



ASURE SOFTWARE



# Asure Wealthcare

Simplify your healthcare finances with convenience, online access to your tax-advantaged benefit account

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## Getting started

The Asure Wealthcare can be accessed by visiting the following URL:

- <https://asuresoftware.wealthcareportal.com>

### Registration

- **Step 1:** If this is your first time accessing Asure Wealthcare, click the *register* button atop the right corner of the home screen.
- **Step 2:** Complete the registration form (as shown in the image on the lower right).
  - Choose a username & password
  - Enter your demographic information
  - Obtain your *employee ID* and *employer ID* from .

If you already have a benefit debit card, the debit card number can be used in place of the *employer ID* in the *registration ID* field.

Before clicking *register*, be sure to view and accept the terms of use.

- **Step 3:** Click *register*. The process may take a few seconds. Do not click your browser's back button or refresh the page.

### Secure authentication

The next phase of registration involves setting up your secure authentication. This important step helps ensure your account is secure and private.

After the registration form is successfully completed, you will be prompted to complete the secure authentication setup process.

- **Step 1.** Select your security questions. From the list, please select four security questions and private your answers. These questions will be randomly asked during subsequent logins to ensure security. When finished, click *next*.
- **Step 2.** Verify your email address.

On the next page, you will be prompted to verify your email. Click *next*.

Register - Secure Authentication

STEP 1 > STEP 2 > **STEP 3** > STEP 4

First Name: Test

Last Name: Account

Confirm Email \*

*The email address entered is used for security encryption only. It is not used for solicitation purposes.*

- **Step 3.** Submit setup information. On the next page, you'll be asked to verify the information you entered during the secure authentication process. After you've reviewed and confirmed the accuracy of this information, click *submit setup information*.

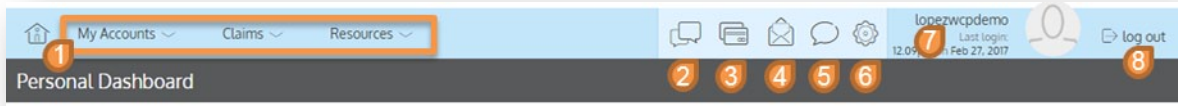
A confirmation page will display the successful completion of your registration.

### Your first login

Once registered, you will be able to enter your username, answer security questions, and enter your password on all subsequent login attempts.

## Navigating your online experience

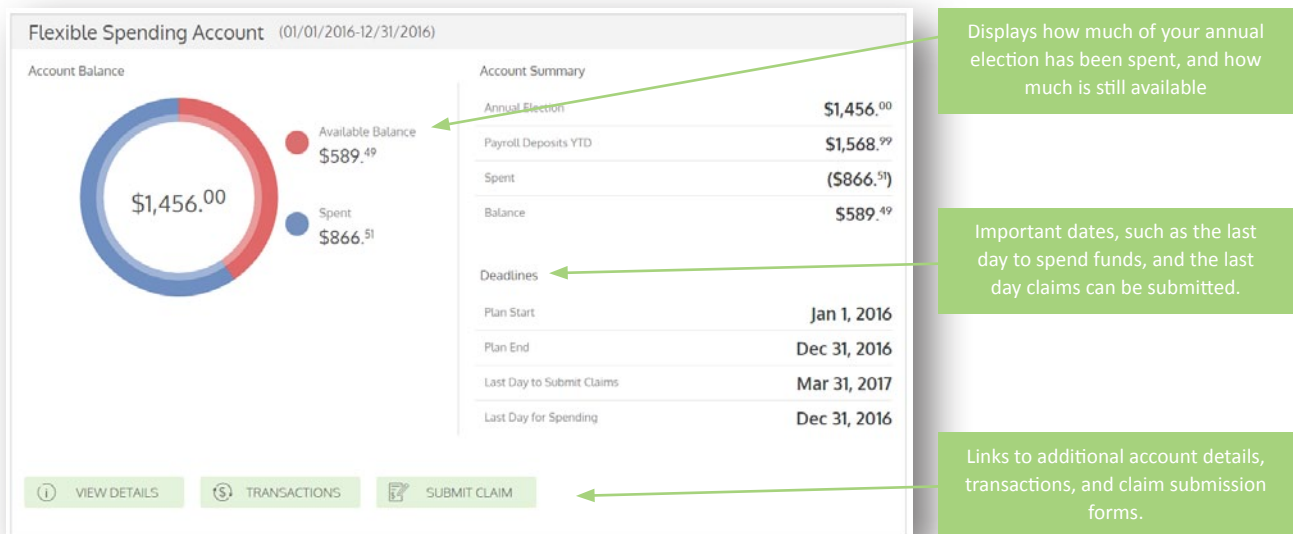
The navigation bar gives you instant access to the key areas and function in the portal. The navigation bar is located atop every page in the portal



1. **Page menus.** Hover over the menu name to view a list of available pages.
2. **Contact us.** Send us a message.
3. **Cards.** Access and manage your debit card(s).
4. **Alerts.** View important account alerts.
5. **Messages.** Important claim, reimbursement, and reminder messages.
6. **Communication settings.** Manage your email and SMS text alert settings & preferences
7. **User profile.** View and manage your profile settings
8. **Log out.** End your session.

## Checking your account balance(s)

Navigate to the *benefit account summary* page to access a quick view of your account balance(s). Each of your accounts displays in its own box, and provides at-a-glance details regarding your balance, funds spent, and important dates.



## Submitting expenses and filing claims

Asure Wealthcare allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

What is the difference between a claim and expense?

- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or at a later date.

### Submitting a claim

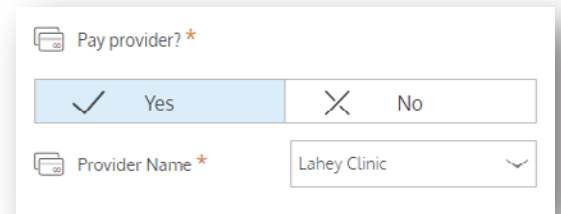
To enter a claim and request reimbursement, open the *submit claim* page and complete the form. Be sure to upload a receipt image if you have one. You can click *browse* to navigate to the file, or you can drag and drop from your computer. Click *submit* to send the request for processing.

The screenshot shows the 'Submit Claim' form with the following fields and options:

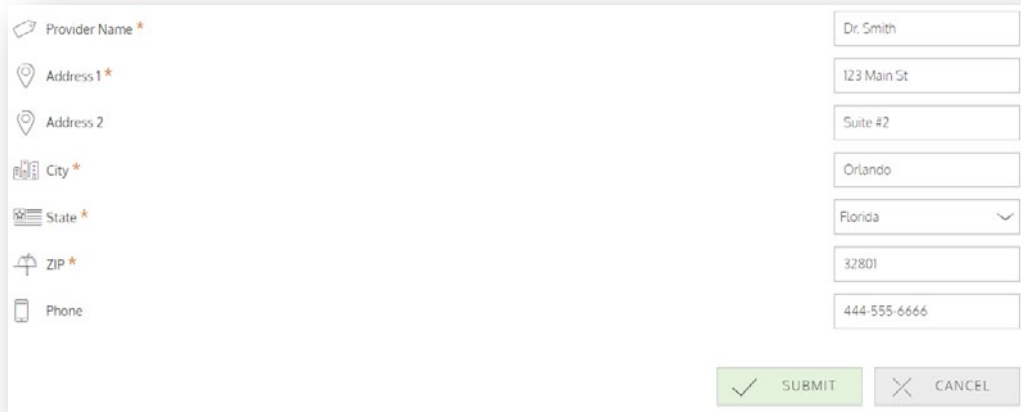
- Claim Amount \***: Text input field containing '\$ 50.00'.
- Service Start Date \***: Date picker showing 'Feb 24, 2017'.
- Service End Date \***: Date picker showing 'Feb 24, 2017'.
- Claimant**: Dropdown menu showing 'NewApp Two'.
- Reimbursement Method**: Dropdown menu showing 'Check'.
- Pay provider? \***: Radio button group with 'Yes' (checked) and 'No' (unchecked).
- Account Type**: Dropdown menu showing 'Flexible Spending Account'.
- Provider Name**: Text input field.
- Comments**: Text area.
- Upload Receipt**: Text input field with a 'BROWSE' button.
- DRAG & DROP**: A dashed box with the text 'your receipts here' and a trash icon.
- Receipt.PNG**: A small thumbnail image of a receipt.
- SUBMIT**: Green button with a checkmark icon.
- CANCEL**: Grey button with an 'X' icon.

**Send payment to your service provider.** When entering a claim, you can choose to have the reimbursement funds sent directly to you, or you can have payment sent directly to your provider (on your behalf).

If you pay a provider, choose your provider name from the dropdown menu. If you don't see your provider listed, select *add new provider record* to add your provider.



A dialog box titled "Pay provider? \*" with two buttons: "Yes" (checked) and "No". Below it is a "Provider Name \*" dropdown menu showing "Lahey Clinic" with a downward arrow.



A form titled "Provider Name \*" with fields for "Address 1 \*", "Address 2", "City \*", "State \*", "ZIP \*", and "Phone". The fields are filled with: "Dr. Smith", "123 Main St", "Suite #2", "Orlando", "Florida", "32801", and "444-555-6666". At the bottom are "SUBMIT" and "CANCEL" buttons.

### Adding an expense for future payment

Similar to claim submission, to enter an expense, open the *add expense for future payment* page and complete the form. Be sure to include a receipt, if you have one.

- **Billed amount.** Full amount billed for services provider.
- **Insurance allowed amount.** The maximum amount your health insurance plan will pay for services provided.
- **Insurance paid amount.** The amount covered by your health insurance plan.
- **Paid non-reimbursable.** The cost included in the insurance allowed amount that are for ineligible items or services.
- **My responsibility.** Any part of the insurance allowed amount that is not covered by your health insurance plan.
- **Reimbursed from my accounts.** The amount reimbursed from your benefit accounts.
- **My remaining responsibility.** The remaining amount you can submit for reimbursement.

\* - Required Field

Service Start Date \* Feb 24, 2017

Service End Date \* Feb 24, 2017

Claimant \* NewApp Two

Provider Dr. Smith

Description flu shot

Billed Amount \* \$ 200.00

Insurance Allowed Amount \* \$ 175.00

Insurance Paid Amount \* \$ 100.00

Paid Non-Reimbursable \$ 15.00

My Responsibility \$ 75.00

Reimbursed from My Accounts \$ 0.00

My Remaining Responsibility \$ 60.00

Comments

Upload Receipt BROWSE

DRAG & DROP your receipts here

Receipt.PNG

SUBMIT CANCEL

### Viewing claims and expenses

Once entered, claims and expenses can be viewed on the *claims list* page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.

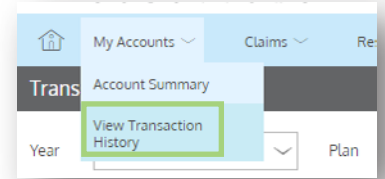
Action Needed			
\$100.00	Eligible for Reimbursement	Claim Date of Service: Oct 26, 2016	REQUEST REIMBURSEMENT
Approved/Paid/Submitted			
(\$32.99)	Paid	Claim Date of Service: Nov 4, 2016 Date of Transaction: Nov 9, 2016	
(\$43.99)	Paid	Claim Date of Service: Nov 3, 2016 Date of Transaction: Nov 9, 2016	
(\$54.00)	Paid	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	
(\$8.00)	Paid	Claim Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016	
\$100.00	Submitted	Claim Date of Service: Oct 26, 2016	ADD RECEIPT
Page 1 of 1			
Denied			
\$34.00	Denied	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	



## Resolving pending debit card transactions

If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

- **Step 1.** Navigate to the *transactions* page.
- **Step 2.** Located the pending transaction (using the search filters)
- **Step 3.** Click to expand the transaction, and click *add receipt* to attach your supporting documentation to the transaction.



We will review the documentation you've submitted and update the transaction accordingly.

Year: 2017 Plan: Dependent Care FSA (Curr) Type: All

Which transactions do you want to see? Select here

☒ Approved/Posted ☒ Pending/Processing ☒ Denied

SEARCH FOR TRANSACTIONS

(\$40. <sup>00</sup> )	Dependent Care FSA Pending	Card	Feb 27, 2017
Date Of Service	Feb 27, 2017	RECEIPTS	ADD RECEIPT
Description	DR. SMITH	No receipts to display.	PRINT
Claimant	NewApp Two		
Account Type	DCA		
Plan Start Date	Jan 1, 2017		
Plan End Date	Dec 31, 2017		
Merchant Name	DR. SMITH		

## Updating your user profile

To access and edit your user profile, click the username hyperlink on the right side of the navigation bar. From this page, you can:

1. Update your phone number and address.
2. Change your password
3. Update your reimbursement method
4. Add a new dependent
5. Update an existing dependent



The image below shows where each item in the list above is located.

**NewApp Two**

Date of Birth  
Jan 1, 1950

Employee ID  
\*\*\*\*\*P002

Marital Status  
None

Gender  
None

Phone  
555-444-1234

Email Address [edit](#) [delete](#)  
hjones@alegeus.com

Address  
1 Main Street  
Beverly  
MA, 00000  
US

Alternate Address  
40 Elm St  
Orlando  
FL, 32801  
US

Employer  
New Mobile App One

SSN  
XXX-XX-5678

Employee Status  
New

Reimbursement Method  
Direct Deposit

Eastern Bank

Account Number  
\*\*\*\*2356

Routing Number  
\*\*\*\*1798

Checking

**Family Members**

**Spouse NewApp Two** Spouse Or Common Law Spouse

Date of Birth  
Mar 3, 1975

SSN  
\*\*\*\*\*1555

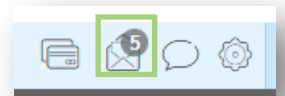
Gender  
None

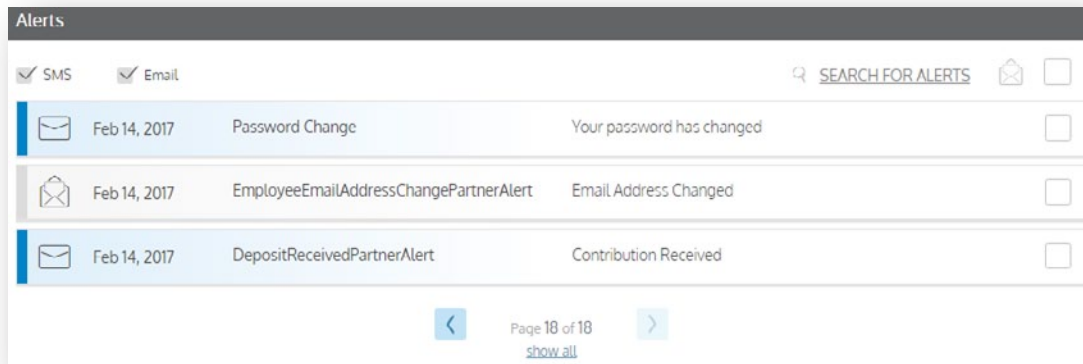
Phone  
None

Address  
1 Main Street  
Beverly, 00000  
US

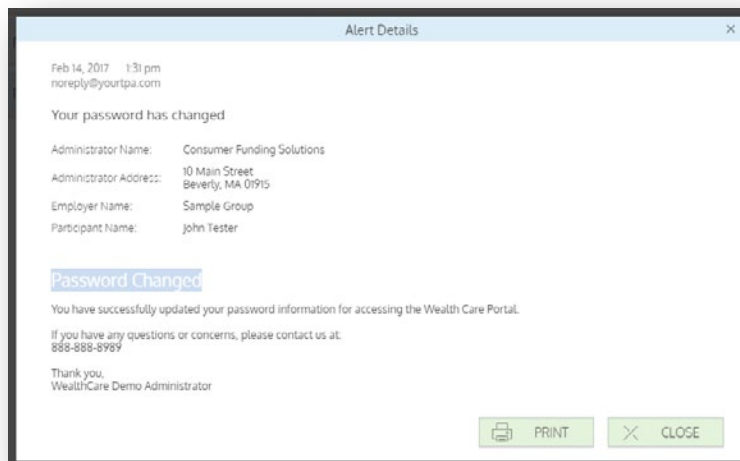
## Viewing and managing alerts & messages

The envelope icon in the navigation bar alerts you to any unread messages awaiting your review. Depending on your communication preferences and your group's setup, these messages could be anything from confirmation of an email address or password change, to notification that a claim you submitted has been received, to an alert that a card transaction was denied, to a wide variety of other messages.





Click on an individual message to see the full text:



### Changing your message preferences

You can change whether or not you receive certain message types, as well as how you receive them from the *communication settings* page. This page can be accessed by clicking the sprocket symbol in the navigation bar.



You may choose, for each alert type, whether you receive it via mobile, email, both, or neither. Click *save* when you are done editing your preferences. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.