

WEX HEALTH CLOUD CONSUMER PORTAL QUICKSTART GUIDE



SOUTHERN CALIFORNIA PIPE TRADES HEALTH & WELFARE FUND Health Reimbursement Arrangement (HRA)

Welcome to your SCPT Health & Welfare Fund HRA Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Health Reimbursement Account (HRA). It enables you to:

- File a claim online
- Upload receipts and track expenses
- View account balance
- View your account activity, claims history and payment (reimbursement) history
- Report a lost/stolen Card and request a new one
- Update your personal profile information
- Change your login ID and/or password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:

1. Work from sections within the Home Page, or
2. Hover over or click on the four tabs at the top.

HOW DO I LOG ON TO HOME PAGE?

1. Go to <https://scptac.lh1ondemand.com>
2. Username is the participant's first initial, last name and zip code, plus 0000 (no spaces).
3. Password is the participant's first initial, last name and last 4 digits of SSN (no spaces).
4. Click **Login**.
5. Once logged in, it is recommended that the participant change his/her username and/or password.

The **Home Page** is easy to navigate:

- Easily access the **Available Balance** and **"I Want To"** sections to work with your accounts right away.
- The **I Want To**...section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to your Accounts, Investments, and Profile.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Recent Transaction** section displays the last 3 transactions on your account(s).
- The **Quick View** section graphically displays some of your key account information.

You can also hover over the tabs at the top of the page.

The screenshot shows the login interface for the Southern California Pipe Trades Health & Welfare Fund. At the top left is the SCPTAC logo, followed by the text "SOUTHERN CALIFORNIA PIPE TRADES HEALTH & WELFARE FUND" and "Health Reimbursement Arrangement (HRA)". Below this is a "Login" section with two columns: "Existing Users" and "New User?". The "Existing Users" column has a "Username" input field, a "Forgot Username?" link, a "Remember Me" checkbox, and a "Next" button. The "New User?" column has the text "New users can create a new account to get started." and a "Get Started" button. At the bottom, there is a "Contact Us" link and a copyright notice: "© WEX Health Inc. 2004-2022. All rights reserved. Powered by WEX Health".

The screenshot shows the home page of the Southern California Pipe Trades Health & Welfare Fund. At the top left is the SCPTAC logo, followed by the text "SOUTHERN CALIFORNIA PIPE TRADES HEALTH & WELFARE FUND" and "Health Reimbursement Arrangement (HRA)". Below this is a navigation bar with tabs: "Home" (selected), "Accounts", "Tools & Support", and "Message Center". The main content area is divided into sections: "I Want To:" with a "Reimburse Myself" button; "Accounts" with a table of "SCPT HRA BENEFITS"; and "Tasks" with a notification icon. The "SCPT HRA BENEFITS" table has the following data:

SCPT HRA BENEFITS	AVAILABLE
SCPT Health Fund HRA	\$135.63

HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.
2. For all Account Activity, click on the **Accounts** tab from the Home Page to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under “Eligible Amount” to view enrollment detail.

NOTE: You can see election details by clicking to expand the line item for each account.

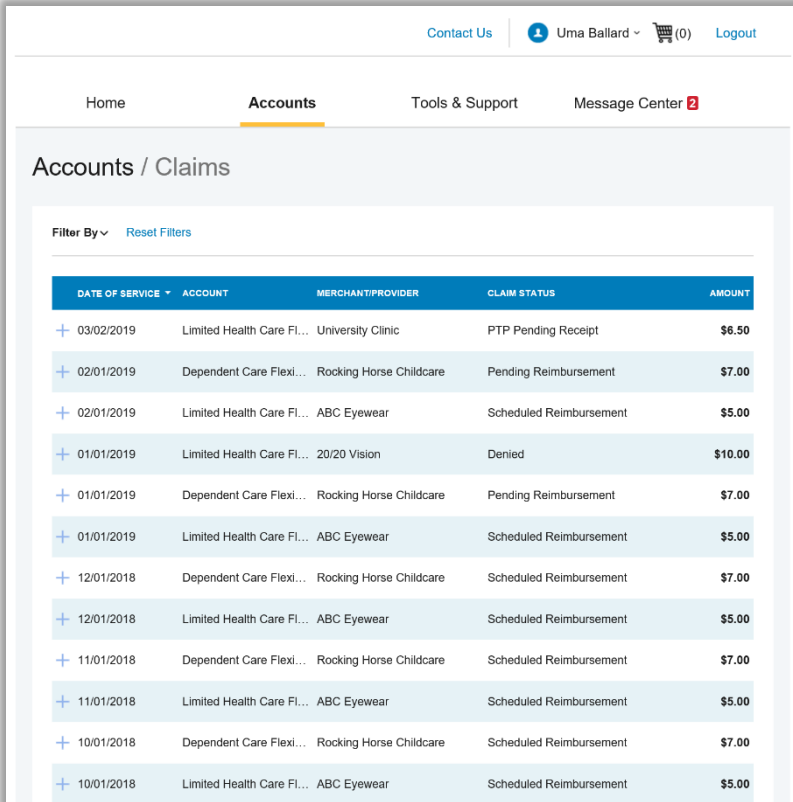
The screenshot shows the SCPTAC Health & Welfare Fund Account Summary page. At the top left is the SCPTAC logo, a stylized 'S' and 'C' in red and blue. To its right is the text 'SOUTHERN CALIFORNIA PIPE TRADES HEALTH & WELFARE FUND' and 'Health Reimbursement Arrangement (HRA)'. Below the logo is a navigation bar with 'Home', 'Accounts' (highlighted with a yellow underline), 'Tools & Support', and 'Message Center'. The main heading is 'Accounts / Account Summary'. A message box states: 'The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits.' Below this is a section titled 'SCPT HRA Benefits' containing a table with the following data:

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ SCPT Health Fund HRA	-	\$0.00	\$0.00	\$0.00	\$0.00	\$135.63

At the bottom of the table is a link: 'Change Payment Method'.

HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

1. From the **Home Page**, click on the **Accounts Tab**, and then click on the **Claims** link to see your claims history. You can apply filters from the top of the screen. You can filter by account type, claim status or receipt status.
2. By clicking on the line of the claim, you can expand the data to display additional claim details.

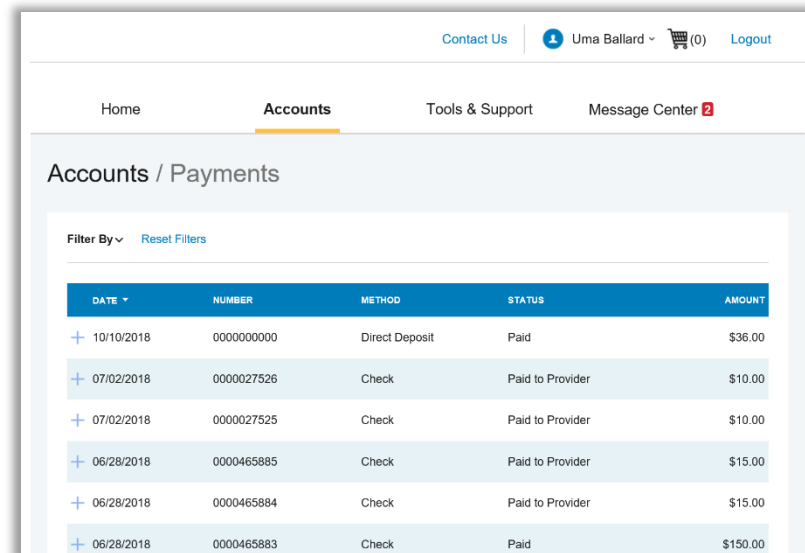


The screenshot shows the 'Accounts / Claims' page in a web application. At the top right, there are links for 'Contact Us', a user profile for 'Uma Ballard', a shopping cart icon with '(0)', and a 'Logout' link. Below this is a navigation bar with 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. The main content area is titled 'Accounts / Claims' and includes a 'Filter By' dropdown and a 'Reset Filters' link. The table below lists various claims with their details.

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 03/02/2019	Limited Health Care Fl...	University Clinic	PTP Pending Receipt	\$6.50
+ 02/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 02/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 01/01/2019	Limited Health Care Fl...	20/20 Vision	Denied	\$10.00
+ 01/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 01/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 12/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 12/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 11/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 11/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 10/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 10/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.
2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.

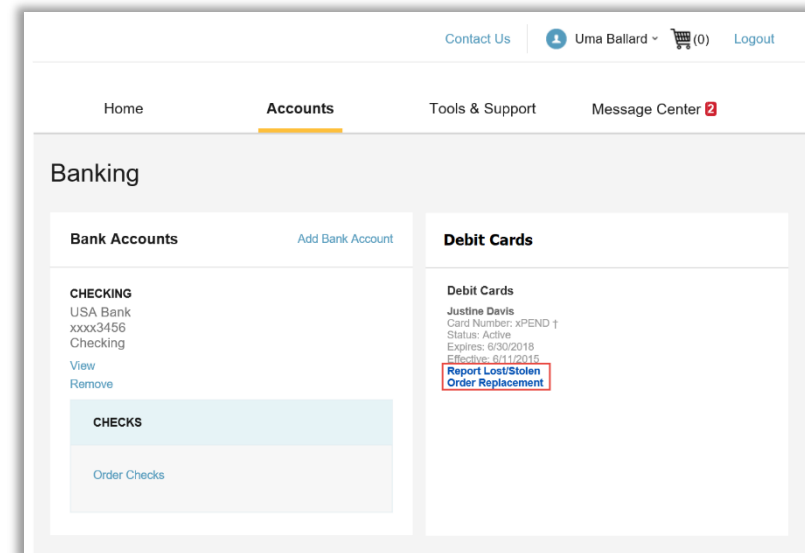


The screenshot shows the 'Accounts / Payments' page. At the top, there are navigation links for 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center' with a notification icon. Below the navigation is a 'Filter By' dropdown and a 'Reset Filters' link. The main content is a table with the following data:

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 10/10/2018	0000000000	Direct Deposit	Paid	\$36.00
+ 07/02/2018	0000027526	Check	Paid to Provider	\$10.00
+ 07/02/2018	0000027525	Check	Paid to Provider	\$10.00
+ 06/28/2018	0000465885	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465884	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465883	Check	Paid	\$150.00

HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.




The screenshot shows the 'Banking' page. At the top, there are navigation links for 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center' with a notification icon. Below the navigation is a 'Bank Accounts' section with an 'Add Bank Account' link. Under 'Bank Accounts', there is a 'CHECKING' section for 'USA Bank' with card number 'xxxx3456' and a 'CHECKS' section with an 'Order Checks' link. To the right is a 'Debit Cards' section for 'Justine Davis' with card number 'xPEND 1', status 'Active', expiration '6/30/2018', and effective date '6/11/2015'. A red box highlights the 'Report Lost/Stolen' and 'Order Replacement' links.

HOW DO I UPDATE MY PERSONAL PROFILE?


1. From the **Home Page**, under the **Accounts Tab**, you will find links to update profile information including mobile number and email address.
2. Click the **Update Profile** link to update your mobile number and/or email address. Note, these changes will only update your WEX HRA profile and will not update any other records with the Fund Office.
3. Complete your changes in the form.
4. Click **Submit**.

Profile / Update Profile

Contact Information *Required

Mobile Number *  () -

Your mobile number will be used only for the purpose of servicing your benefit plan account. This information will not be used for any solicitations.

Time Zone *  (UTC-08:00) Pacific Time (US & Canada) ▾

Email Address

Confirm Email Address

By providing an email address, you will receive communications electronically about your benefits in lieu of paper documents. Your email address will not be shared or used for any other purpose.

Alternate Email Address

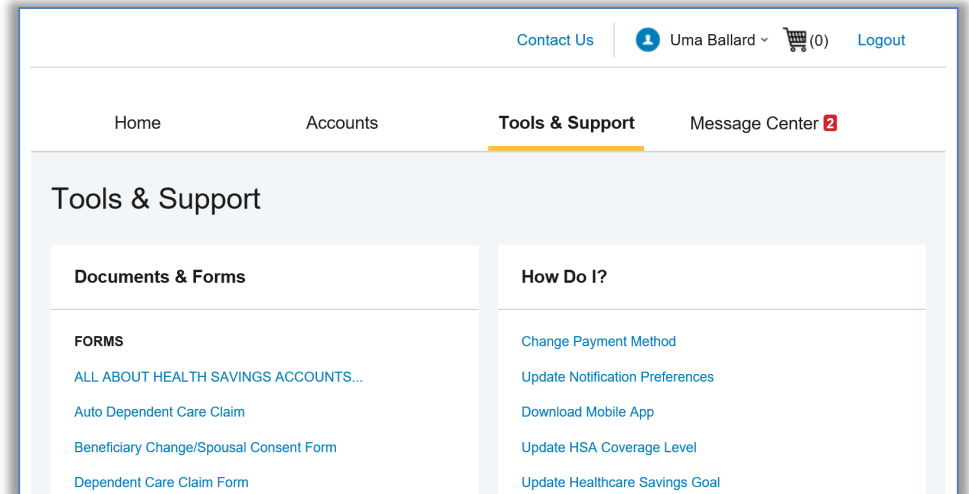
Confirm Alternate Email Address

By providing an alternate email address, you will have one more option to keep your account secure. Your alternate email address will not be shared or used for any other purpose.

HOW DO I GET MY REIMBURSEMENT FASTER?

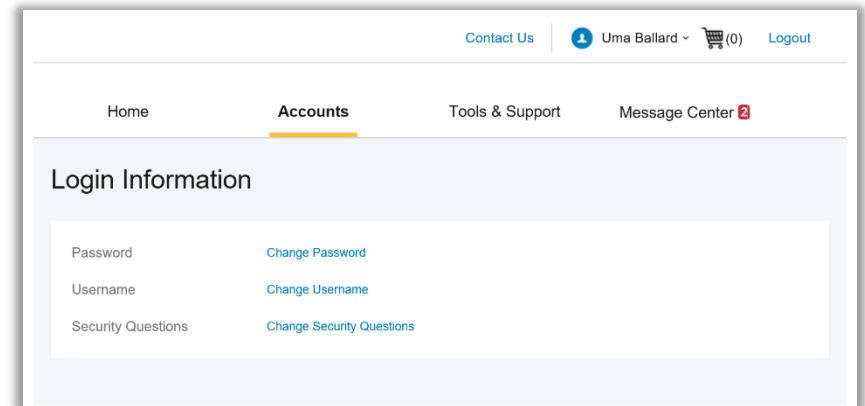
The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit setup online.

1. From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the “**How Do I**” section
2. Select **Update** for the appropriate plans. Update the secondary reimbursement method to **Direct Deposit**.
3. Enter your bank account information and click **Submit**.
4. The **Payment Method Changed** confirmation displays.
5. There is a bank validation requirement. You will be notified on the portal to look for a small transaction or “micro-deposit” in your designated bank account in the next couple of days to enter online, which will validate your account.



HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow instructions on the screen.
3. Click **Save**.



HOW DO I VIEW OR ACCESS:

...DOCUMENTS & FORMS?

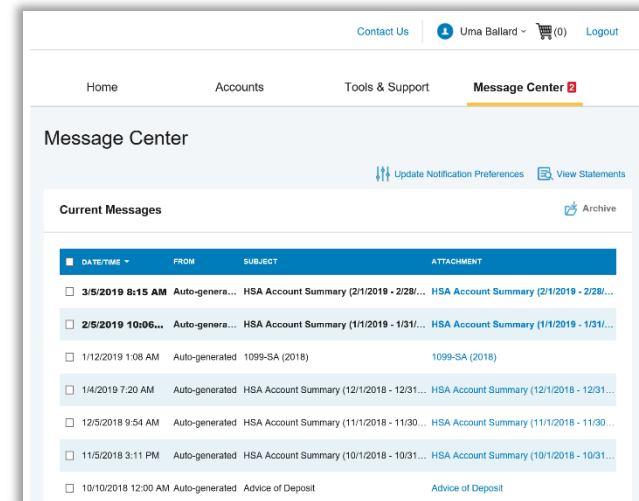
1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

...NOTIFICATIONS?

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.

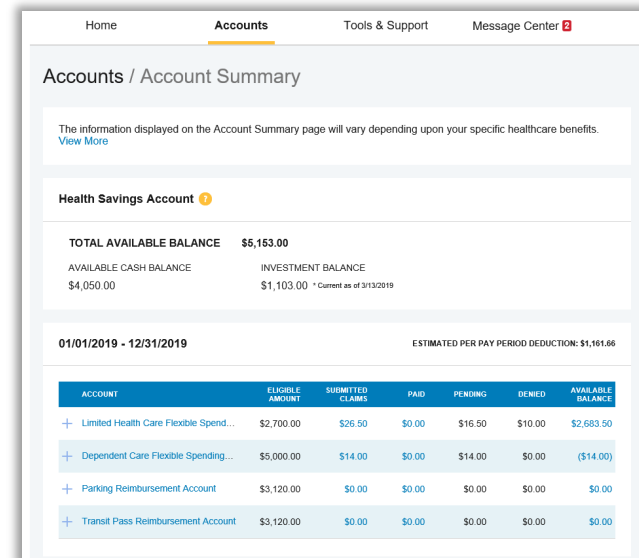
...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts Tab**, you will be directed to the **Account Summary** page
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.
OR from the **Home Page**, under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.



The screenshot shows the Message Center interface. At the top, there are navigation tabs: Home, Accounts, Tools & Support, and Message Center (which is highlighted). Below the tabs, there are links for "Update Notification Preferences" and "View Statements". The main section is titled "Current Messages" and contains a table of messages. Each message row includes a checkbox, a date and time, a "FROM" field (usually "Auto-generated..."), a "SUBJECT" field, and an "ATTACHMENT" field.

DATE/TIME	FROM	SUBJECT	ATTACHMENT
<input type="checkbox"/> 3/5/2019 8:15 AM	Auto-genera...	HSA Account Summary (2/1/2019 - 2/28/...	HSA Account Summary (2/1/2019 - 2/28/...
<input type="checkbox"/> 2/5/2019 10:06...	Auto-genera...	HSA Account Summary (1/1/2019 - 1/31/...	HSA Account Summary (1/1/2019 - 1/31/...
<input type="checkbox"/> 1/12/2019 1:08 AM	Auto-generated	1099-SA (2018)	1099-SA (2018)
<input type="checkbox"/> 1/4/2019 7:20 AM	Auto-generated	HSA Account Summary (12/1/2018 - 12/31/...	HSA Account Summary (12/1/2018 - 12/31/...
<input type="checkbox"/> 12/5/2018 9:54 AM	Auto-generated	HSA Account Summary (11/1/2018 - 11/30/...	HSA Account Summary (11/1/2018 - 11/30/...
<input type="checkbox"/> 11/5/2018 3:11 PM	Auto-generated	HSA Account Summary (10/1/2018 - 10/31/...	HSA Account Summary (10/1/2018 - 10/31/...
<input type="checkbox"/> 10/10/2018 12:00 AM	Auto-generated	Advice of Deposit	Advice of Deposit



The screenshot shows the Accounts / Account Summary page. At the top, there are navigation tabs: Home, Accounts (highlighted), Tools & Support, and Message Center. Below the tabs, there is a section for "Health Savings Account" with a balance of \$5,163.00. Below this, there is a table showing account balances for "TOTAL AVAILABLE BALANCE", "AVAILABLE CASH BALANCE", and "INVESTMENT BALANCE". At the bottom, there is a table showing account activity for the period "01/01/2019 - 12/31/2019".

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

MORE HELPFUL INFORMATION

From the **Home Page**, under the **Tools & Support** tab, you may find links that connect you to helpful information. These links are to the SCPT website which will enable you to manage your healthcare more effectively.