



# Participant Experience

Member Web and MyChoice Mobile App

**mychoice**<sup>®</sup>  
Accounts

# ▶ Benefitsolver and MyChoice Accounts

Member Web Experience





# ▶ Fully integrated online experience

Integrated into Benefitsolver for easy access and a one-wallet benefits experience



The screenshot shows the Acme Benefits Center website. At the top, the logo 'ACME TOTAL WELLBEING' is on the left, and navigation links for 'Home', 'Help', 'Reference Center', and 'Jesse Mays' are on the right. A search bar is also present. Below the navigation is a banner for 'Annual Enrollment is Here!' with a calendar icon showing '43 Days Left' and a 'Continue' button. A breadcrumb trail reads: '> Home > Annual Enrollment > Benefits Information > I Want To... > Benefitsolver Examples'. The main content area features a large blue header: 'Welcome to the Acme Benefits Center'. Below this are several sections: 'Important Reminders' with an 'Action Required' alert for 'Annual Enrollment - In Progress'; 'MyChoice Mobile App' with an 'Access the App' button; 'Welcome, Jesse' with a grid of tiles for 'Profile', 'Benefit Summary', 'Change My Benefits', 'Compare Plans', 'MyChoice Accounts View My Account' (highlighted with a purple border), and 'Benefit Programs'; '2023 Updates' with links for 'Vendor Carrier Changes' and 'Health Assessments & Upcoming Webinars in Q1 2023'; 'Total Compensation'; and 'Reference Center' with links for 'Benefit Guide' and 'Open Enrollment'. At the bottom, there are three more tiles: 'Add My Baby', 'Manage my HSA', and 'Improve My Wellness'.

# MyChoice Accounts Dashboard

ACME TOTAL WELLBEING

Home Help Reference Center Jesse Mays

Type Here to Search

Home Solver Wellness Series I Want To... My Health Benefits Protecting My Income MyChoice Accounts

Dashboard Accounts Investments Claims Manage Statements

Dashboard

What do you want to do today? Select... Get Started

Process for submitting claims

1. Submit Documentation 2. Claim Processed 3. Claim Paid

**Documents should include:**

1. Date the expense was incurred
2. Name of the service provider
3. Description of the service and/or expense
4. Amount of the expense for which you are responsible
5. Patient or Dependent name (if applicable)

**Cancelled checks, credit card receipts, and balance forward statements are NOT acceptable forms of documentation.**

**Processing request statuses:**

- Approved
- Approved Awaiting Funds
- Needs Documentation
- Partially Approved

**Your claim has been paid**

**Account Balances**

2022 - Dependent Care Spending Account DCA	\$128.97
2021 - Dependent Care Spending Account DCA	\$0.00
2023 - LFSA LFSA	\$267.24
2022 - LFSA LFSA	\$0.00
2021 - LFSA LFSA	\$0.00
Health Savings Account HSA	\$1,419.81

- Quick start menu
- View Account Details
- Submit claims
- View claims summary
- Manage Bank Accounts
- Manage Providers (for provider pay)
- Investments
- Balances



# ▶ Individual Account Detail

Access Account Statements  
Investments (HSA)  
Pay Provider or  
Transfer/Reimburse

View and filter transactions

The screenshot displays the ACME Total Wellbeing HSA account detail page. The page includes a navigation menu with options like Home, Annual Enrollment, Benefits Information, and I Want To... A search bar is located in the top right. The main content area shows the HSA - Health Savings Account with a balance of \$960.61. A donut chart indicates the total HSA funds of \$960.00, with a legend for Total Amount Invested and Available Balance. A summary table on the right lists contributions and debits. Below this is a table of account transactions, including a payment to Dr. Smith on 05/03/2022 for \$-1.50, with a progress bar showing the status from Submitted to Paid.

Category	Amount
Prior Contributions	\$1,000.00
2023 Contributions To Date	\$0.00
<b>Total Contributions</b>	<b>\$1,000.00</b>
Prior Debits	\$0.00
2023 Debits To Date	\$0.00
<b>Total Debits</b>	<b>\$0.00</b>
<b>Total HSA Funds</b>	<b>\$960.00</b>
Funds Invested	\$0.00
<b>Available Cash Balance</b>	<b>\$960.61</b>

Date	Transaction	Status	Amount
05/03/2022	Payment to Dr Smith General Medical - Jesse Mays ADJ0012786232	Approved 1.Submitted 2. Processed 3. Paid	\$-1.50

# ▶ Pay a Provider Directly

- Pay your doctor, hospital or other vendor directly from your account
- Upload documentation or receipts
- Members can do this directly in the claim process or add providers under Manage > Providers.

The screenshot shows the ACME Total Wellbeing website interface. At the top, there is a navigation bar with the ACME logo, 'TOTAL WELLBEING', and user options like Home, Help, Reference Center, and Jesse Mays. A search bar is also present. Below the navigation, there are breadcrumb trails: Home > Annual Enrollment > Benefits Information > I Want To... > Benefitsolver Examples, and a secondary trail: Dashboard > Accounts > Claims > Manage > Statements.

The main content area is titled 'Submit Claim'. It features a QR code and text: 'Submitting Claims is Even Easier with the MyChoice Mobile App. Download Now with QR Code'. To the right, there is a section for 'Account Balances' showing a 'Health Savings Account HSA' with a balance of '\$960.61'.

The 'Claim Type' section asks 'Who do you want to pay?' with two options: 'Myself' (Pay yourself back for an expense you have already paid) and 'Provider' (Pay a provider directly for an expense you have not yet paid). The 'Provider' option is selected.

The 'Payment' section has two radio buttons: 'Existing Provider' (selected) and 'New Provider'. Below this is a 'Select Provider \*' dropdown menu with 'Select...' as the current selection. The 'Payment Type' section has two radio buttons: 'One Time Payment' (selected) and 'Recurring Schedule Payment' (This will create a recurring schedule that you can manage on an ongoing basis and is the best option if you will need reimbursed for this expense regularly).

At the bottom, there are fields for 'Amount \*' (with a '\$' symbol), 'Who is this expense for?' (dropdown menu showing 'Jesse Mays'), 'Service Start Date \*' (calendar icon), and 'Service End Date \*' (calendar icon).

# Claims > Submit Claim

## Submit Claim



Submitting Claims is Even Easier with the MyChoice Mobile App.

Download Now with QR Code

### Claim Type

#### Who do you want to pay?

Myself

Pay yourself back for an expense you have already paid

Provider

Pay a provider directly for an expense you have not yet paid

### Reimbursement

#### Reimbursement Type

One Time Reimbursement

Recurring Schedule Reimbursement

This will create a recurring schedule that you can manage on an ongoing basis and is the best option if you will need reimbursed for this expense regularly.

#### Amount \*

\$

#### Are you requesting reimbursement for a service or a purchase?

Service

Ex: doctor visits, chiropractor appointments, childcare expenses.

Purchase

Ex: buying contacts, medicine, pharmacy items, or insurance premiums.

#### Provider (Optional)

#### Who is this expense for?

### Account Balances

2022 - Dependent Care Spending Account DCA	\$128.97
2021 - Dependent Care Spending Account DCA	\$0.00
2023 - LFSA LFSA	\$267.24
2022 - LFSA LFSA	\$0.00
2021 - LFSA LFSA	\$0.00
Health Savings Account HSA	\$1,419.81

## Supporting Documentation

### Document should include:

1. Date the expense was incurred
2. Name of the service provider
3. Description of the service and/or expense
4. Amount of the expense for which you are responsible
5. Patient or Dependent name (if applicable)

**⚠ Canceled checks, credit card receipts, and balance forward statements are NOT acceptable forms of documentation.**



Drop your files here

or

Allowed file formats:  
.png,.pdf,.jpg,.jpeg,.gif  
Max allowed size for file: 20 MB

## Required Agreement

I certify that this expense has not been reimbursed by any other means.

Payments may be fulfilled by a Third Party

- Dynamic fields display based on responses.
- Upload documentation & Submit



# ▶ Claims > Claim Summary

- Shows all claims, transfers, and card transactions in process
- Claims on a recurring schedule
- Claims history
- Edit claims
- Search function
- Filter by claim types

Dashboard Accounts **Claims** Manage Statements

Claim Summary \$ Submit Claim

In Process Recurring Schedule History

Type to search All Claim Types All Payees

Date	Transaction	Status	Amount
05/06/2022	Payment to Dr Smith General Medical - Jesse Mays Transaction ID : 7710059	Approved 1.Submitted 2. Processed 3. Paid	\$1.50
05/05/2022	Payment to Target Pharmacy General Prescription - Jesse Mays Transaction ID : 7696072	Approved 1.Submitted 2. Processed 3. Paid	\$37.89

Showing 2 of 2

# ▶ MyChoice Accounts Investments (HSA)

- Self-directed investment tools embedded into the MyChoice Accounts member web

ACMECOMPANY

Home Message Center Reference Center Jeannie Doe

MyChoice Accounts Dashboard Accounts Investments Claims Manage

### Initial Funding Amount

Move money from your HSA to your investment account in a few easy steps.

Available HSA Balance to Invest  
**\$5,820.93**

Your current HSA Balance is \$6,820.93. You are required to maintain a minimum balance of \$1,000 in your HSA.

Risk Disclosure: Investing in securities involves risk of loss that HSA investors should be prepared to bear. No investment process is free of risk; no strategy or risk management technique can guarantee returns or eliminate risk in any market environment. Past performance is not a guarantee of future results. The value of investments, as well as any investment income, is not guaranteed and can fluctuate based on market conditions. Diversification does not assure a profit or protect against loss.

Cancel Next

© 1999-2022 Businessolver Privacy Policy | Browser Requirements

english español français

Hi, Jeannie

## Investment Management Report

Prepared for HSA RIA Businessolver  
As of 9/30/2022

Sentinel Benefits & FINANCIAL GROUP

Fund (Ticker)	Added To Plan	Fund Score	Overall MStar Rating	Avg Annual Total Returns (%Rank)					Inception (Date)	Std. Dev.		Sharpe		Exp%
				YTD	1 Year	3 Year	5 Year	10 Year		3 Yr	5 Yr	3 Yr	5 Yr	
<b>Short Government (84 Funds)</b>														
Vanguard Short-Term Treasury ETF(VGSH)		N/A	★★★★	-4.54	-5.11	-0.58	0.49	0.52	0.68 (11/19/09)	1.74	-0.67			0.04
Bloomberg Government 1-5 Yr TR USD				-6.33	-7.03	-1.04	0.36	0.59		2.45	2.22	-0.66	-0.37	
Category Average				-5.63	-6.24	-1.13	0.14	0.27		2.11	1.87	-0.80	-0.56	0.64/0.79
<b>Short-Term Bond (603 Funds)</b>														
Vanguard Short-Term Bond ETF(BSV)		N/A	★★★	-6.60	-7.29	-0.94	0.51	0.81	2.08 (4/3/07)	2.43	-0.62			0.04
Bloomberg US Govt/Credit 1-5 Yr TR USD				-6.62	-7.29	-0.90	0.55	0.88		2.44	2.19	-0.61	-0.28	
Category Average				-6.35	-6.80	-0.61	0.66	0.94		3.62	2.93	-0.39	-0.22	0.67/0.86
<b>Intermediate Core Bond (467 Funds)</b>														
iShares Core US Aggregate Bond ETF(AGG)		N/A	★★★	-14.50	-14.58	-3.29	-0.31	0.85	2.90 (9/22/03)	5.34	-0.71			0.03
Bloomberg US Agg Bond TR USD				-14.61	-14.60	-3.26	-0.27	0.89		5.36	4.77	-0.70	-0.28	
Category Average				-14.67	-14.86	-3.22	-0.40	0.77		5.55	4.84	-0.67	-0.31	0.59/0.91
<b>Global Bond-USD Hedged (133 Funds)</b>														
Vanguard Total International Bond ETF(BNDX)		N/A	★★★★	-12.85	-13.02	-4.16	0.03		1.66 (5/31/13)	5.04	-0.93			0.07
Vanguard Total World Bond ETF(BNDW)		N/A	★★★	-13.70	-13.76	-3.71			-0.34 (9/4/18)	5.22	-0.81			0.06
Bloomberg Global Aggregate TR Hdq USD				-12.09	-12.05	-3.07	0.32	1.69		4.49	4.03	-0.80	-0.20	
Category Average				-13.67	-13.98	-3.62	-0.24	1.02		5.97	4.91	-0.73	-0.31	0.74/1.06
<b>Large Value (1,268 Funds)</b>														
Vanguard Value ETF(VTV)		N/A	★★★★★	-14.58	-6.61	6.14	7.06	10.49	7.74 (1/26/04)	19.14	0.37			0.04
Russell 1000 Value TR USD				-17.75	-11.36	4.36	5.29	9.17		20.45	18.09	0.28	0.31	
Category Average				-16.64	-9.64	5.27	5.75	8.98		20.59	18.30	0.32	0.34	0.91/1.52
<b>Large Blend (1,437 Funds)</b>														
iShares Core S&P 500 ETF(IVV)		N/A	★★★★	-23.88	-15.50	8.13	9.20	11.66	6.07 (5/15/00)	20.30	0.45			0.03
Vanguard Total Stock Market ETF(VTI)		N/A	★★★★	-24.87	-18.00	7.58	8.55	11.33	7.26 (5/24/01)	20.97	0.42			0.03
S&P 500 TR USD				-23.87	-15.47	8.16	9.24	11.70		20.30	18.07	0.45	0.51	
Category Average				-23.28	-15.83	6.77	7.74	10.38		20.32	18.19	0.39	0.44	0.80/1.03

**Legend:** ▶ Recommended Addition ▶ See Notes for Change Detail  
Recommended Removal

FundScore: Superior (9-10) Acceptable (5-8.75) Watch (<5) N/A: No FundScore

Performance data provided represents past performance and is not indicative of future results. Investment return and principal value will fluctuate so that shares, when redeemed, may be worth more or less than their original cost. Performance returns for periods of less than one year are not annualized. Current performance may be lower or higher than the performance data shown. PLEASE REFER TO THE DISCLOSURE PAGE ATTACHED AT THE END OF THIS REPORT FOR ADDITIONAL IMPORTANT DISCLOSURE. THIS REPORT CANNOT BE SHOWN OR PROVIDED WITHOUT THE ATTACHED DISCLOSURE PAGE.

Page 1 of 4

Select the graphic for the full fund line-up

# ▶ MyChoice Accounts Investments (HSA)

ACMECOMPANY

Home Message Center Reference Center Jesse Fuentes

Home My Health My Finances My Security

Dashboard Accounts Investments Manage Statements

Health Savings Account \$0.00

Investments Transact

Health Savings Account

Self-Directed  
XXXXXX0003

Investment Value <b>\$0.00</b> Value as of 8:34 AM January 9, 2024	Account Cash Balance <b>\$3,000.00</b> <a href="#">Go to Account</a>	Available to Invest <b>\$2,000.00</b> You are required to keep a minimum \$1,000 cash balance
--	--	---

Portfolio Allocations

Name	Symbol	Quantity	Value
There are no portfolio allocations to show			

Amount Invested: \$0.00

- Modern, flexible investment model using ETFs rather than mutual funds
- Real-time trading

ACMECOMPANY

Home Message Center Reference Center Jesse Fuentes

Dashboard Accounts Investments Manage Statements

### Select Your Investment Funds

Please choose and enter the amount you wish to invest into each fund

Available HSA Balance to Invest: \$2,000.00

Fund	Price	Dollar Amount
<b>BNDX</b> Vanguard Total International Bond ETF <a href="#">Additional Info</a>	\$49.125	\$ 150.00
<b>BNDW</b> Vanguard Total World Bond <a href="#">Additional Info</a>	\$68.965	\$ 0.00
<b>AGG</b> iShares Core US Aggregate Bond ETF <a href="#">Additional Info</a>	\$99.06	\$ 0.00
<b>VGSH</b> Vanguard Short-Term Treasury <a href="#">Additional Info</a>	\$58.517	\$ 0.00
<b>BSV</b> Vanguard Short-term Bond ETF <a href="#">Additional Info</a>	\$77.235	\$ 150.00
<b>VTI</b> Vanguard Total Stock Market ETF <a href="#">Additional Info</a>	\$237.02	\$ 0.00
<b>VUG</b> Vanguard Growth ETF <a href="#">Additional Info</a>	\$312.867	\$ 0.00
<b>VTV</b> Vanguard Value ETF <a href="#">Additional Info</a>	\$149.14	\$ 0.00



# ▶ Manage > Cards

Dashboard Accounts ▾ Investments ▾ Claims ▾ **Manage ▾** Statements ▾

**Manage Cards**

Bank Accounts






Providers

### Manage Cards

#### MyChoice Accounts Card

✓ FSA2024, ✓ HSA

[+ Add Cardholder](#)

	<b>Matthew Jones</b> ••••0090Exp. 02/29 ✓ Active	
	<b>Jennie Jones</b> ••••0074Exp. 02/29 ✓ Active	
	<b>Millie Jones</b> ••••0082Exp. 10/28 ✓ Active	

- Reissue Card
- Report Card Lost or Stolen
- Lock Card

# ▶ Manage > Bank Accounts (direct deposit)

Dashboard Accounts ▾ Investments Claims ▾ Manage ▾ Statements ▾

Bank Accounts + Add Account

Checking  
\*\*\*\*7893  
✓ Verified ☑ Primary Account

# ▶ Manage > Providers

Dashboard Accounts ▾ Investments Claims ▾ Manage ▾ Statements ▾

Providers + Add Provider

- Metrolina Eye Associates  
630 Comfort Lane, Suite E NC 28112
- Rock Hill Schools  
386 E. Black Street PO Drawer 10072 SC 29731

- Add Recurring Payments
- Edit
- Delete



# ▶ Statements: FSA + HRA

- Real-time balance information
- Account transactions
- Claim status tracker
- Claim history
- Recurring schedule
- Available in member web or mobile app

Dashboard Accounts Investments Claims Manage Statements

DCA - 2022 - Dependent Care Spending Account \$ 128.97

DCA - 2021 - Dependent Care Spending Account \$ 0.00

**LFSA - 2023 - LFSA \$ 267.24**

LFSA - 2022 - LFSA \$ 0.00

LFSA - 2021 - LFSA \$ 0.00

HSA - Health Savings Account \$ 1,159.81

**LFSA - 2023 - LFSA** [\\$ Submit Claim](#)

Total Reimbursements \$2,432.76

Available Balance \$267.24

Elected Amount \$2,700.00

Total Reimbursements YTD \$2,432.76

Available Balance \$267.24

Annual Elected Amount \$2,700.00

Account Transactions

Type to search All Transaction Types All Status

Date	Transaction	Status	Amount
04/21/2023	Employee Contribution ACC0020566032	Posted	\$112.50
04/16/2023	Card Purchase at ACL*SAMSClubCONTA CTS Optometrists (8043) - Shelley Jones ADJ0021376713	Approved	-\$170.94
04/07/2023	Employee Contribution ACC0020149247	Posted	\$112.50
03/24/2023	Employee Contribution ACC0019669004	Posted	\$112.50
03/10/2023	Employee Contribution ACC0019264685	Posted	\$112.50
02/24/2023	Employee Contribution ACC0018813617	Posted	\$112.50
02/09/2023	Card Purchase at JACKSON ORTHODONTICS Dentists - Shelley Jones ADJ0019005875	Approved	-\$2,261.82

Claim Summary

In Progress Recurring Schedule History

10/31/2023

Expense Reimbursement to Megan Pierce -\$80.00

Medical Office Visit - Megan Pierce

Transaction ID: 123456789

request received Recurring Claim

Payment to First Choice Dental Group -\$29.00

Dental Teeth Cleaning - Morgan Pierce

Transaction ID: 123456789

request received

9/1/2023

Payment to New Horizon Academy -\$450.00

Dependent Care Child Care - Morgan Pierce

Transaction ID: 123456789

Approved

8/1/2023

Payment to True Roots Chiropractic \$100.00

Chiropractors - Megan Pierce

Transaction ID: 123456789

Approved

# ▶ Statement Menu: HSA Only

HSA Members

The screenshot displays the mychoice Accounts website interface. At the top, there is a navigation bar with 'Home', 'Benefits Information', and 'I Want To...'. Below this is a secondary navigation bar with 'Dashboard', 'Accounts', 'Investments', 'Claims', 'Manage', and 'Statements'. The 'Statements' menu is highlighted with an orange box, and its dropdown options are visible: 'Account Statements', 'Tax Statements', 'Investment Statement', 'Investment Trade Confirmation', and 'Statement Preferences'. The main content area is divided into three sections: a 'Dashboard' section with a 'What do you want to do today?' prompt and a 'Select...' dropdown; a 'Process for submitting claims' section with a three-step flowchart (1. Submit Documentation, 2. Claim Processed, 3. Claim Paid) and detailed instructions for each step; and an 'Account Balances' section with a table showing balances for 2024-LFSA, 2023-LFSA, and Health Savings Account.

Home > Benefits Information > I Want To...

Dashboard Accounts Investments Claims Manage Statements

Account Statements  
Tax Statements  
Investment Statement  
Investment Trade Confirmation  
Statement Preferences

### Dashboard

What do you want to do today?

### Process for submitting claims

1. Submit Documentation      2. Claim Processed      3. Claim Paid

**Documents should include:**

1. Date the expense was incurred
2. Name of the service provider
3. Description of the service and/or expense
4. Amount of the expense for which you are responsible
5. Patient or Dependent name (if applicable)

**Cancelled checks, credit card**

**Processing request statuses:**

- Approved
- Approved Awaiting Funds
- Needs Documentation
- Partially Approved

**Your claim has been paid**

### Account Balances

2024 - LFSA LFSA	\$0.00
2023 - LFSA LFSA	\$0.00
<b>Health Savings Account</b> HSA	<b>\$879.96</b>

# Account Statements: HSA

View

Account Statements - qtrly

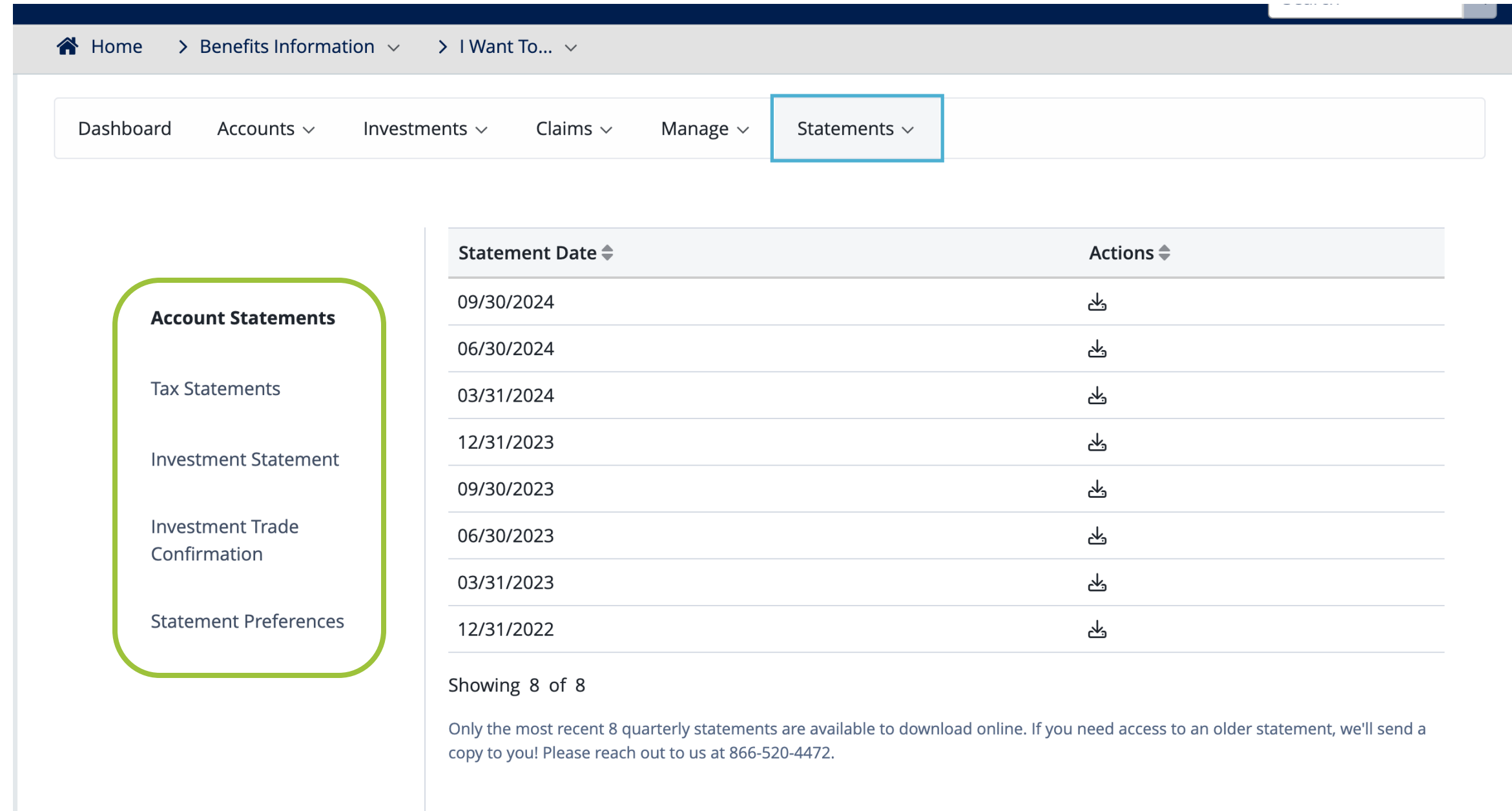
Tax Statements – Jan/May

Investment Statement - monthly

Trade Confirmation – per trade

Statement Preferences

Download as PDF on demand



Statement Date	Actions
09/30/2024	Download
06/30/2024	Download
03/31/2024	Download
12/31/2023	Download
09/30/2023	Download
06/30/2023	Download
03/31/2023	Download
12/31/2022	Download

Showing 8 of 8

Only the most recent 8 quarterly statements are available to download online. If you need access to an older statement, we'll send a copy to you! Please reach out to us at 866-520-4472.



# ▶ Statements: HSA

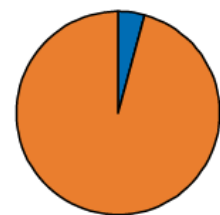
Members may review their transactions in real time from their HSA account page or download a PDF statement like this one. >



### Account Information

Account Registration  
MATTHEW JONES  
100 MAIN STREET  
ROCK HILL SC 29730-3331

### Fair Market Value as of December 31, 2023



Your Allocation	
Deposit Account <sup>1</sup>	\$1,097.45
Investment Account(s) <sup>3</sup>	\$24,767.48
<b>Fair Market Value</b>	<b>\$25,864.93</b>

### For Your Information

<sup>1</sup> Funds in this account are insured by the FDIC to the maximum permitted by law

<sup>3</sup> NOT FDIC INSURED / NO BANK GUARANTEE / MAY LOSE VALUE  
This is an aggregate of your HSA Saver Account and your Self-Directed Investment Account. Securities in your Self-Directed Investment Account are offered through UMB Financial Services, Inc., a registered broker/dealer and member FINRA (www.finra.org), SIPC and not by UMB Bank, n.a.

Self-Directed Investment balance reflects the balance at the time this statement was created and may vary from actual investment balance. Self-Directed Investment activity is not included. See your investment statement for most current balance and activity. That statement will be delivered separately.

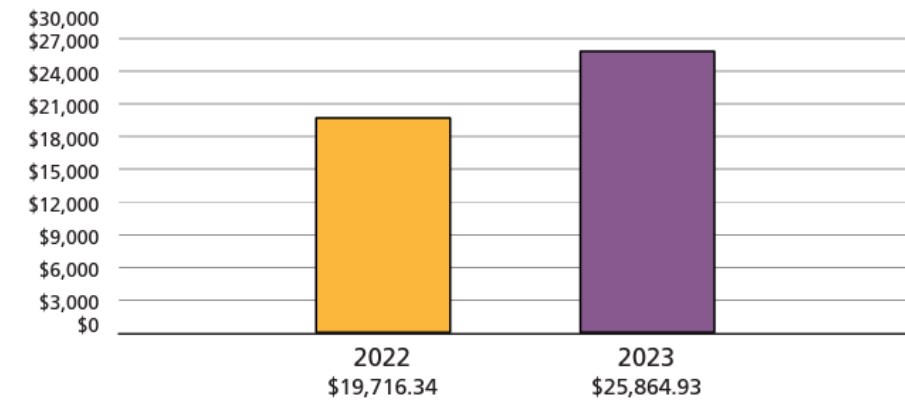
### Your Healthcare Account Statement

October 1, 2023 through December 31, 2023  
Account Number 2223334445

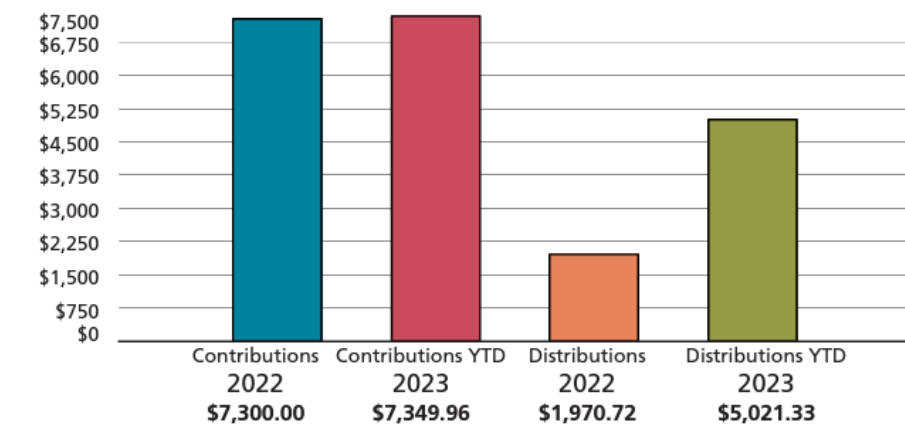
### Contact Information:

866-520-4472

### Fair Market Value



### Contributions & Distributions

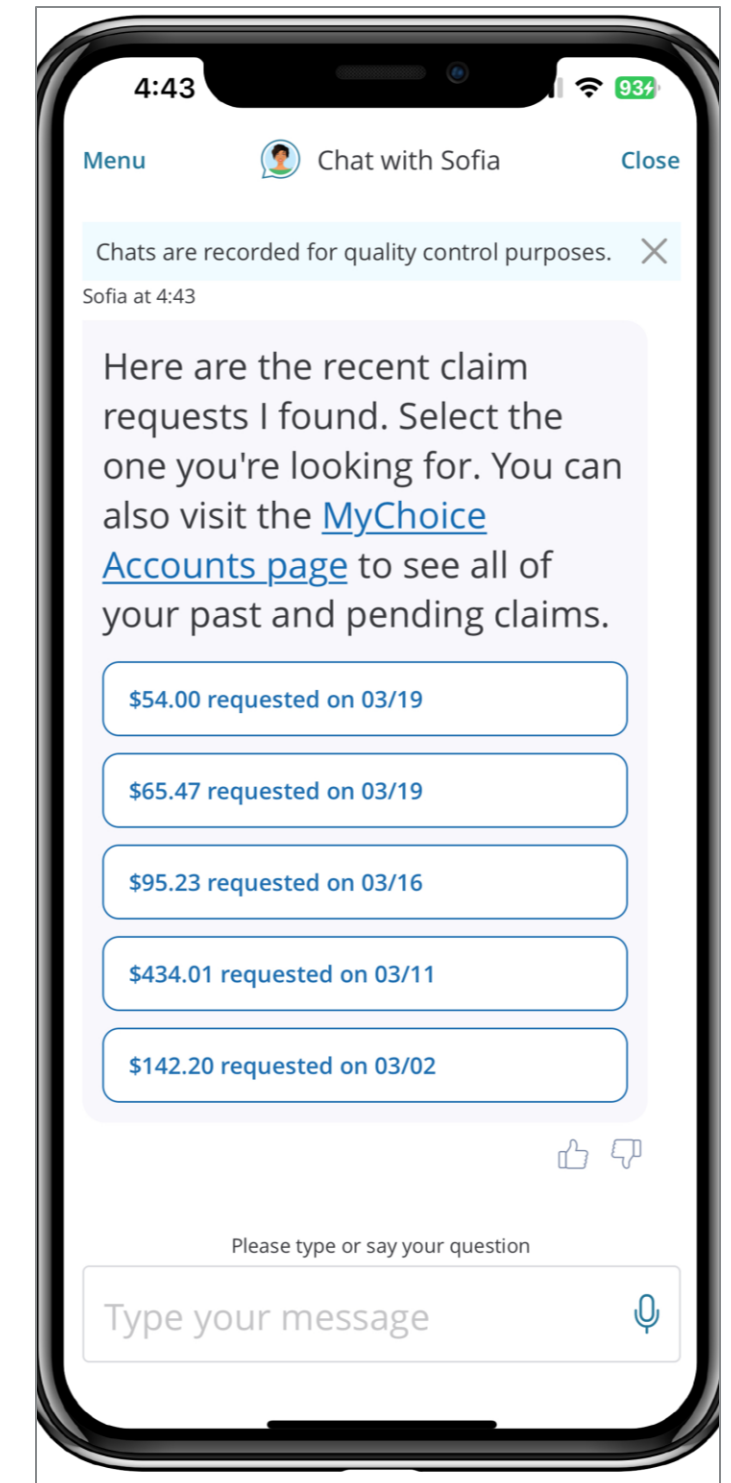
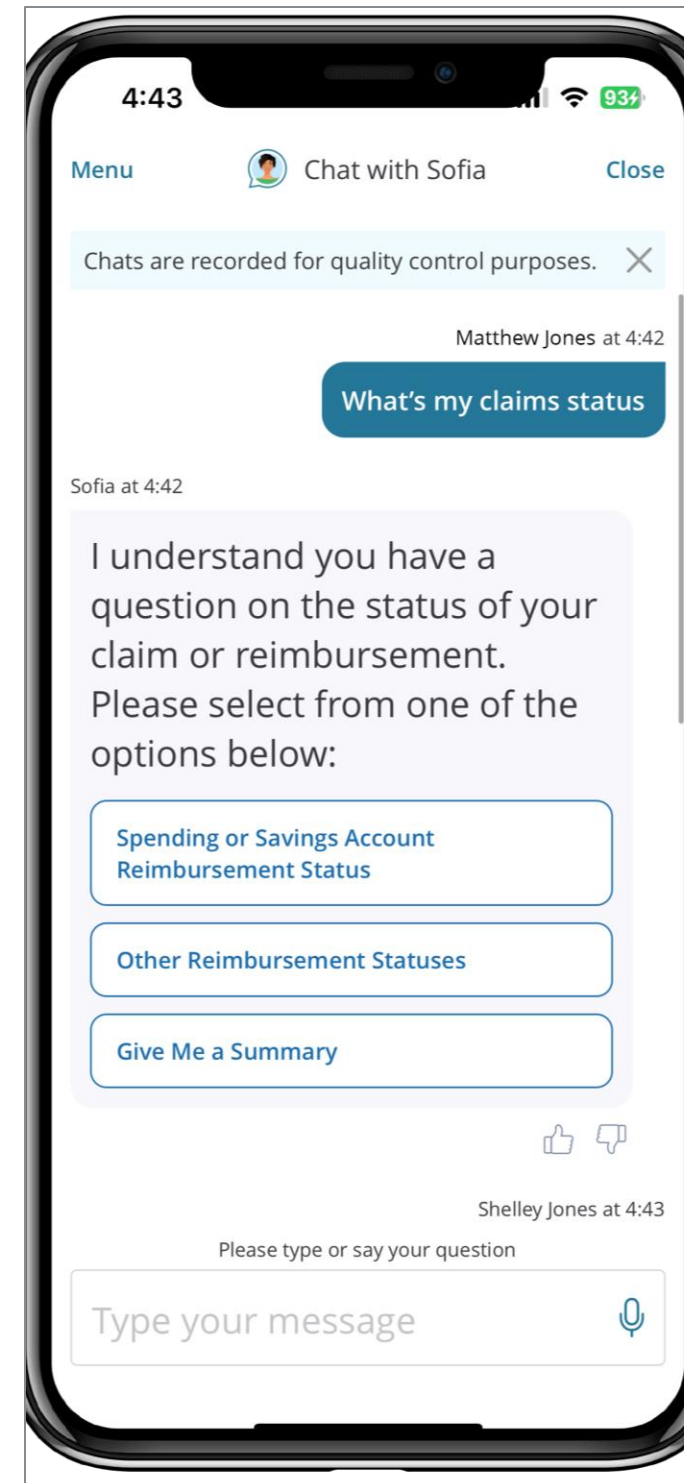
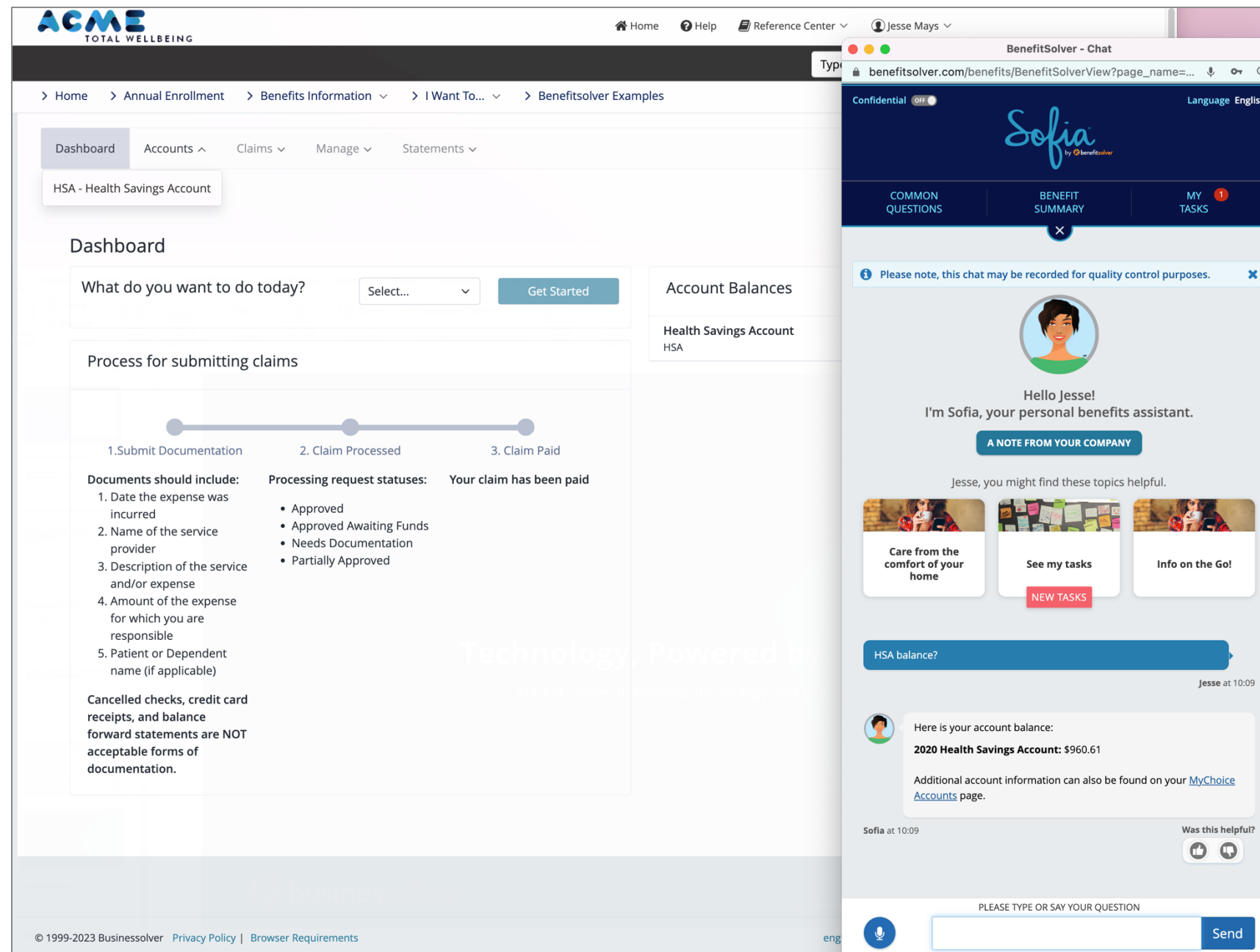


072273 2/3

page 3 of 5

# ▶ AI Assistant, Sofia knows MyChoice Accounts

Members may access Sofia 24/7 through the member web and get more details on their accounts quickly...in 52 languages and via voice or type-to-chat.



# ▶ Member Web Demo Video

The screenshot displays the mychoice Accounts member web interface. At the top, there is a navigation bar with links for Home, Message Center, Help, Reference Center, and a user profile for Matthew Johnson. A search bar is located on the right side of the navigation bar. Below the navigation bar, there is a breadcrumb trail: Home > Annual Enrollment > New Hire > Benefits Information > I Want To... > Benefitsolver Examples. The main content area is titled "Dashboard" and includes a sub-navigation menu with options: Dashboard, Accounts, Investments, Claims, Manage, and Statements. The dashboard features a "What do you want to do today?" section with a "Select..." dropdown menu and a "Get Started" button. The dropdown menu is open, showing options: Submit Claims, View Claim St..., View Recurrin..., Manage Provi..., Transfer Funds, and Get Statements. Below this is a "Process for submitting claims" section with a three-step flowchart: 1. Submit Documentation, 2. Claim Processing, and 3. Claim Paid. Under each step, there are detailed instructions and lists of statuses. The "Account Balances" section is highlighted with a green dashed border and contains a table of account balances. At the bottom of the dashboard, there is a footer with copyright information, language options (english, español, français), and a chatbot icon labeled "Hi, I'm Sofial".

Home Message Center Help Reference Center Matthew Johnson

Type Here to Search

> Home > Annual Enrollment > New Hire > Benefits Information > I Want To... > Benefitsolver Examples

Dashboard Accounts Investments Claims Manage Statements

### Dashboard

What do you want to do today?

Select... Get Started

Submit Claims  
View Claim St...  
View Recurrin...  
Manage Provi...  
Transfer Funds  
Get Statements

#### Process for submitting claims

1. Submit Documentation 2. Claim Processing 3. Claim Paid

**Documents should include:**

1. Date the expense was incurred
2. Name of the service provider
3. Description of the service and/or expense
4. Amount of the expense for which you are responsible
5. Patient or Dependent name (if applicable)

**Cancelled checks, credit card receipts, and balance forward statements are NOT acceptable forms of documentation.**

**Processing request statuses:**

- Approved
- Approved Awaiting Funds
- Needs Documentation
- Partially Approved

**Your claim has been paid**

#### Account Balances

2023 - Dependent Care FSA DCA	\$208.33
Medical Travel Reimbursement ESP	\$0.00
Lifestyle Account FIT	\$0.00
2023 - Limited Purpose FSA 2022 LFSA	\$2,300.00
Health Savings Account HSA	\$156.71
Tuition Assistance TUI	\$0.00

© 1999-2023 Businessolver Privacy Policy | Browser Requirements english español français

Hi, I'm Sofial

# ▶ MyChoice Mobile App

Mobile Participant Experience





# ▶ MyChoice Mobile App

The MyChoice Mobile App is the best place for members to manage ALL their benefits, including their accounts.

It's easy to upload a photo for documentation or submit an HSA transfer in moments... Or check their balance on the go.

This app is for all of Benefitsolver, so there's just one app to manage.

- Store and send ID cards
- Ask Sofia questions
- Initiate enrollment
- Verify benefits



## REQUEST PAYMENT

*(Flexible Spending Accounts, Commuter Parking or Health Reimbursement Accounts)*

To request payment/reimbursement, follow the instructions on the screen and fill in all required fields. If you have a question about whether a product or service is eligible for reimbursement, review your Eligible Expense Guide located in the Reference Center, review [IRS Publication 502](#), or review our [online eligible expense list](#).

### Request Reimbursement

*FSA or HRA*

**Online:** Use the [Submit Claim](#) button on any screen or navigate to [Claims > Submit Claim](#). Follow the instructions on the screen and fill in all required fields.

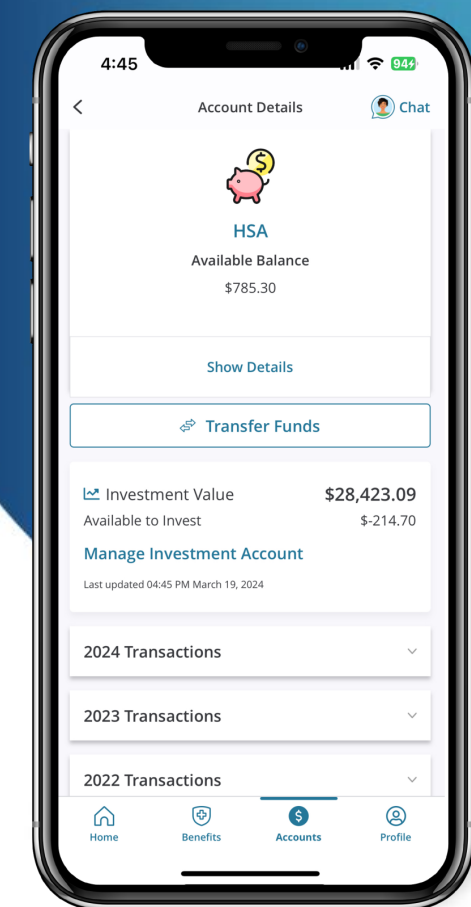
**Mobile:** Select [Accounts](#) and then tap [Submit Claim](#) and complete all required fields.

### Pay a Provider

**Online:** If you want to use your account balance to pay a provider directly, select [Claims > Submit Claim](#), then select [Care Provider](#) on the claims submission experience under claim type "Who do you want to pay?"

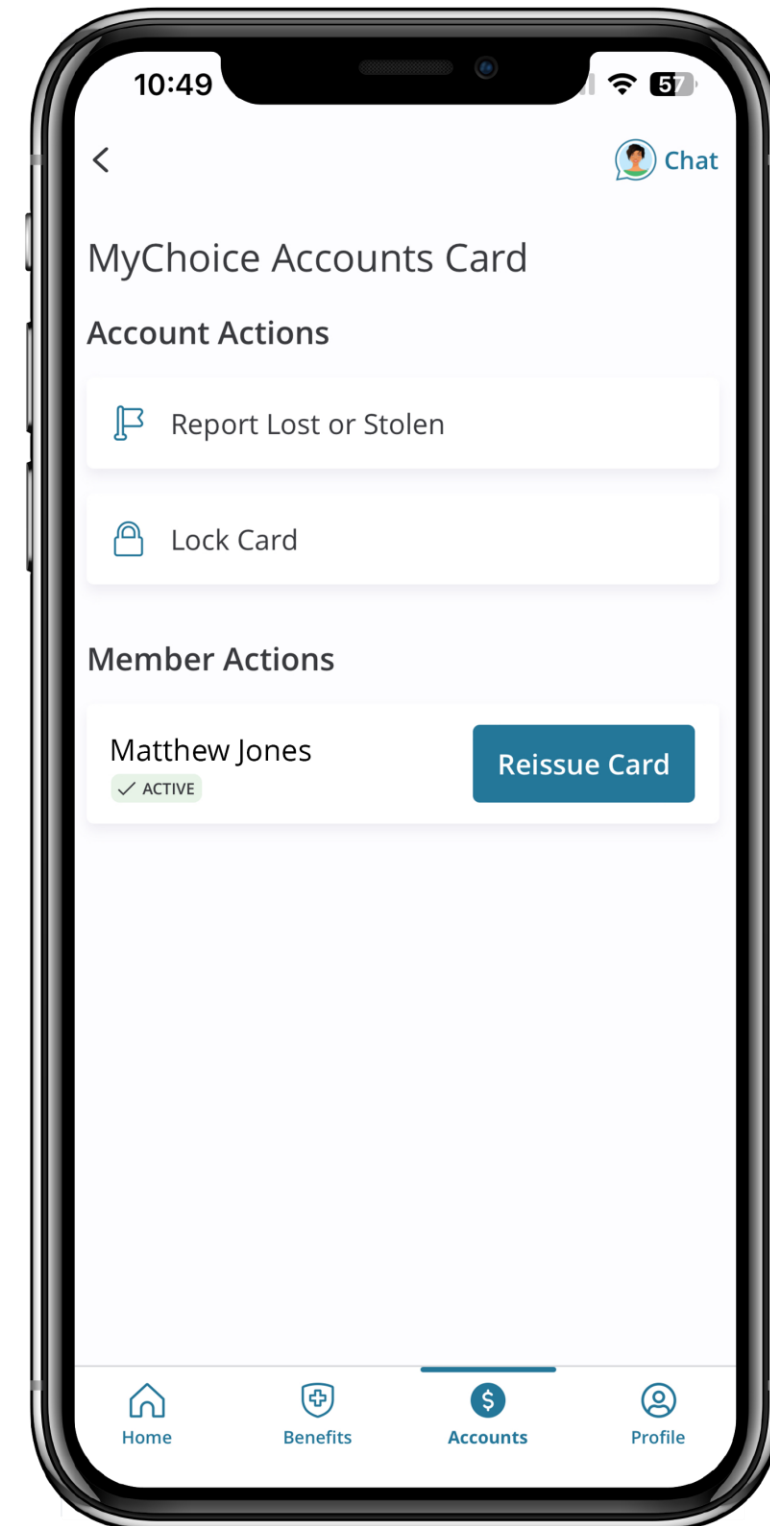
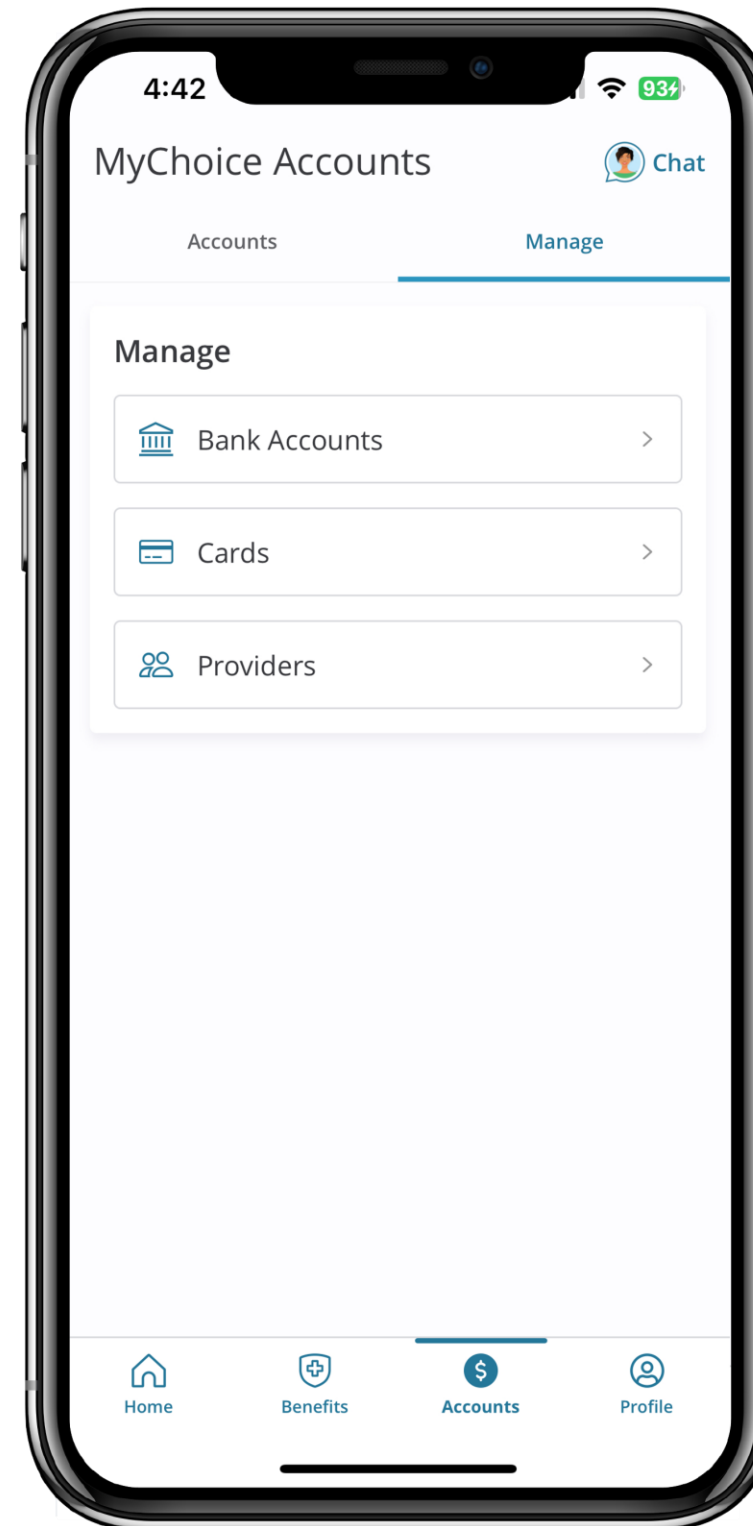
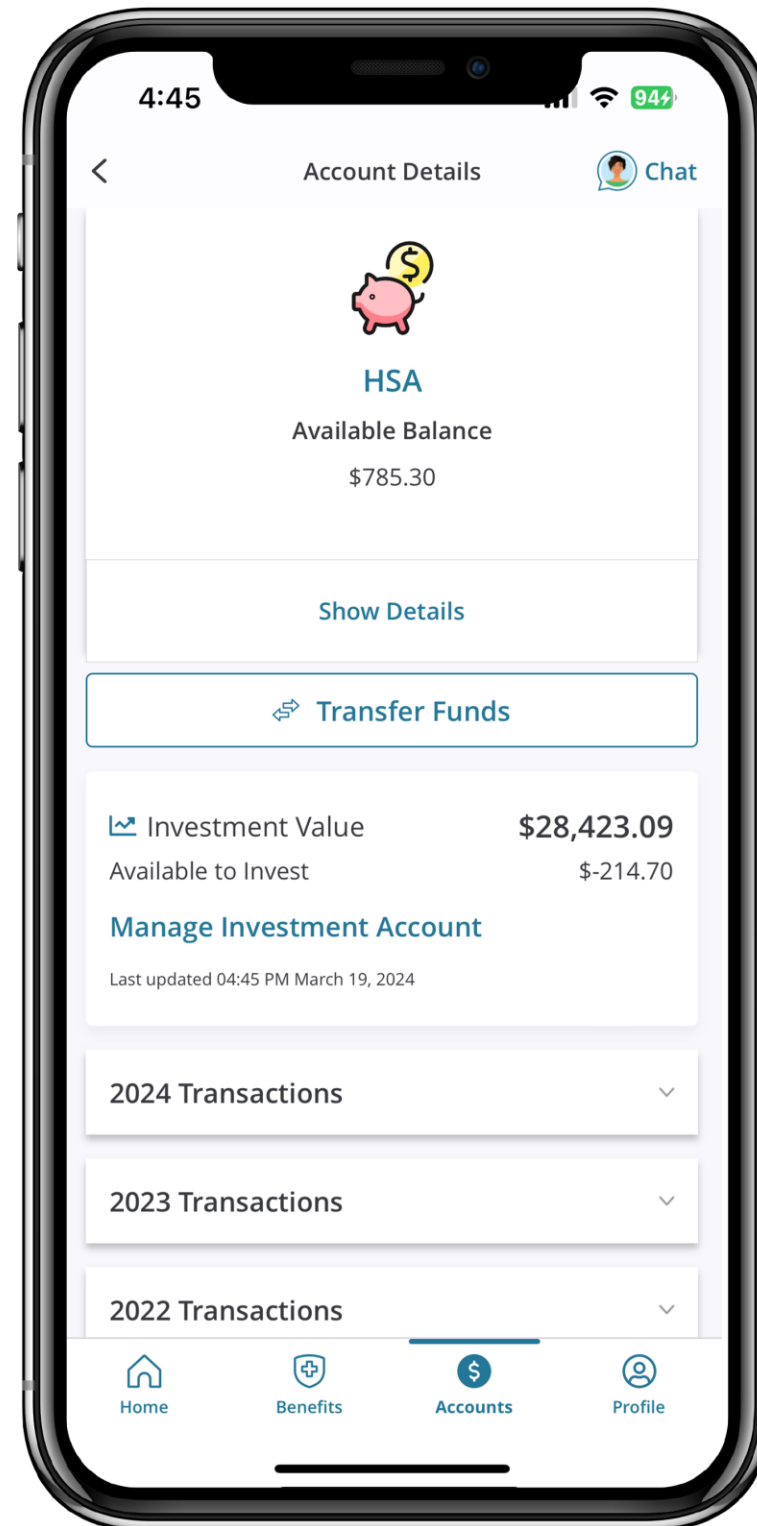
You can select the provider name and indicate the date for the payment and additional details of service. Then, you can upload any required documentation and submit the expense for payment. MyChoice Accounts will manage the payment based on your settings.

**Mobile:** Select [Accounts](#) and tap the [Manage](#) tab. Tap the [Providers](#) tile to add a new provider or edit an existing provider.



# ▶ MyChoice Mobile App

The MyChoice Mobile App offers complete parity with the online experience. Members may perform all functions related to their saving/spending account in the app.



# ▶ MyChoice Mobile App Claims

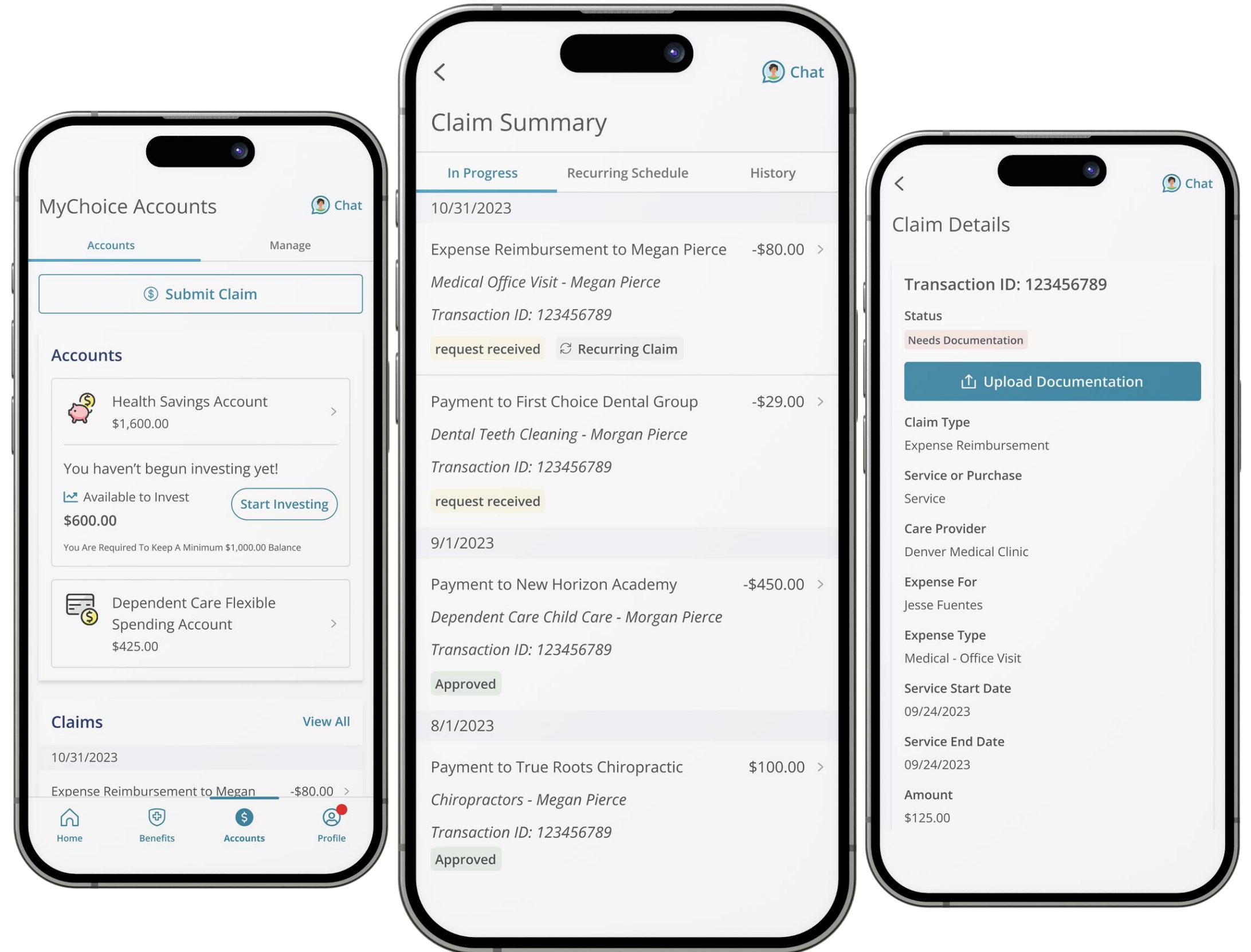
▶ Log in to the app, select **Submit Claim** and follow the prompts.

▶ Fill in the details:

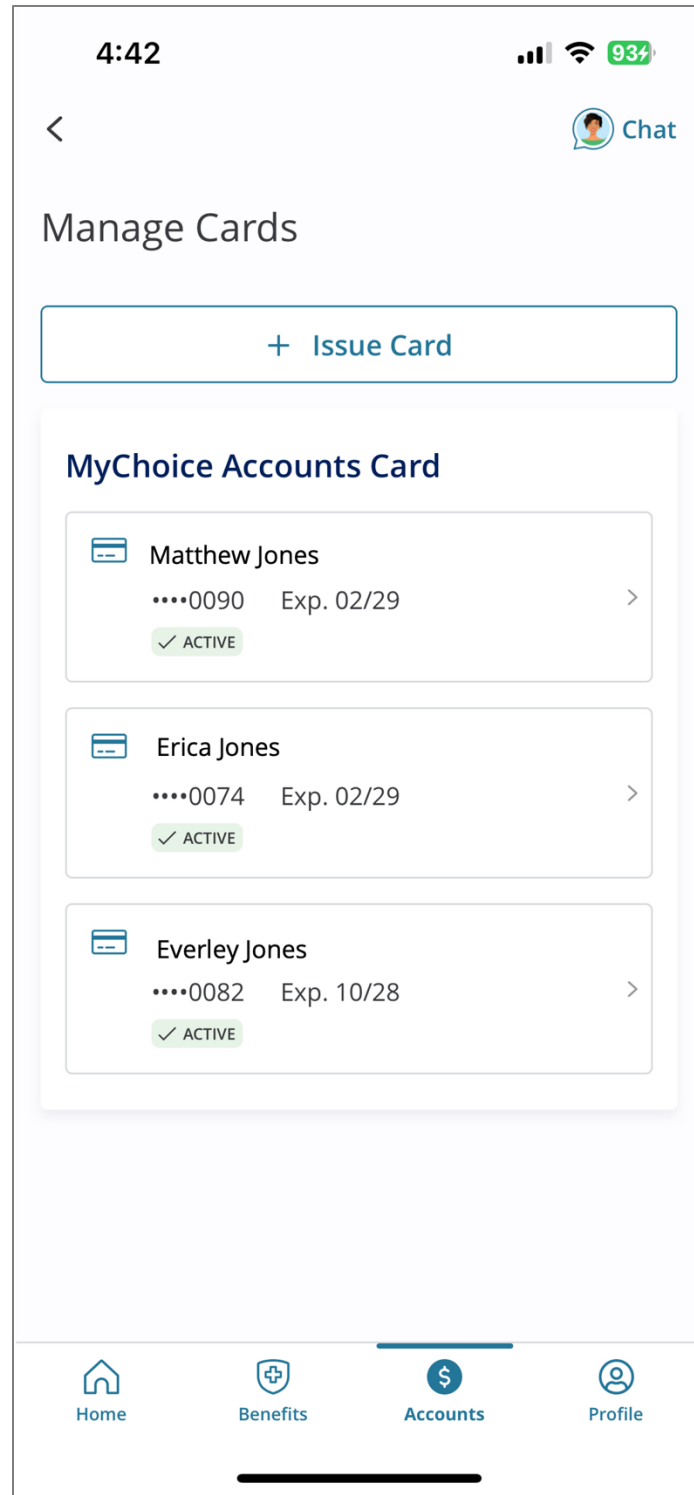
- Receipt image (*use device camera*)
- Date of service
- Category
- Service
- Amount requested

▶ Select **Review Claim**.

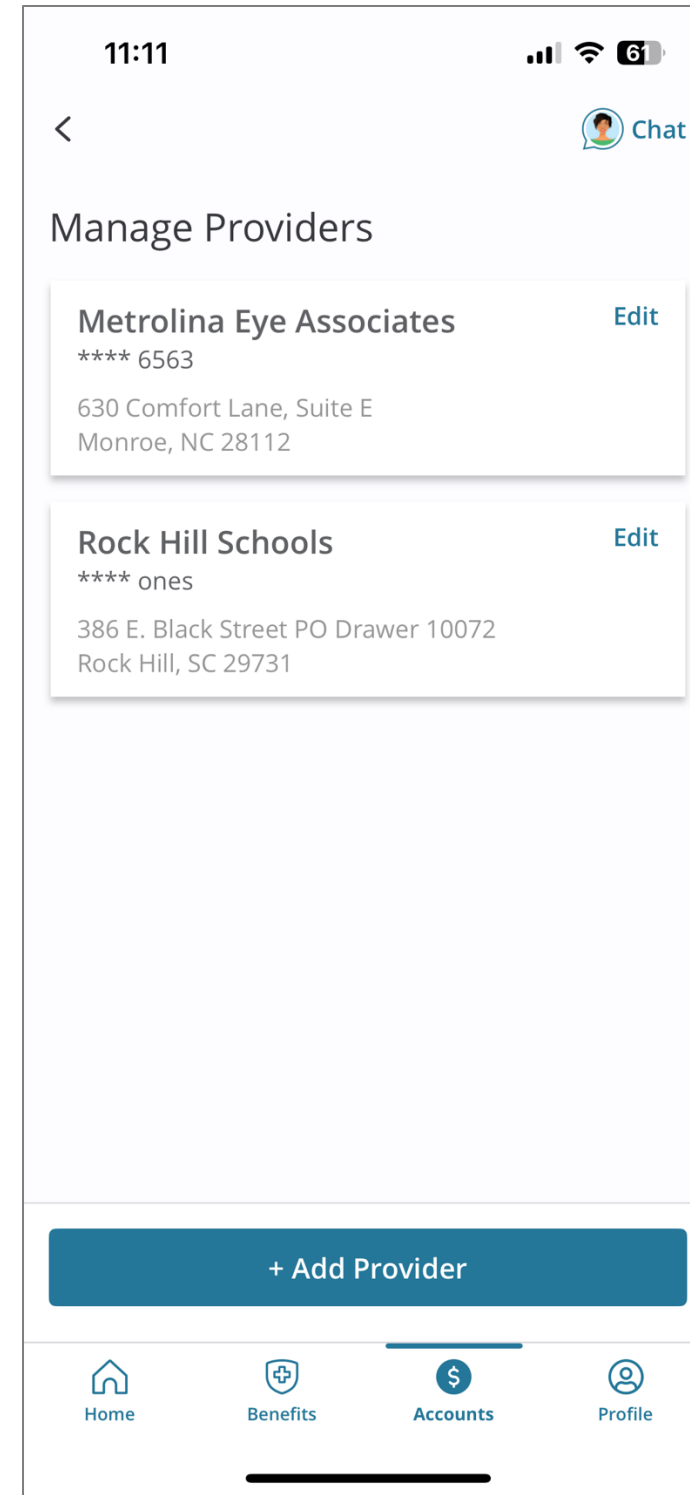
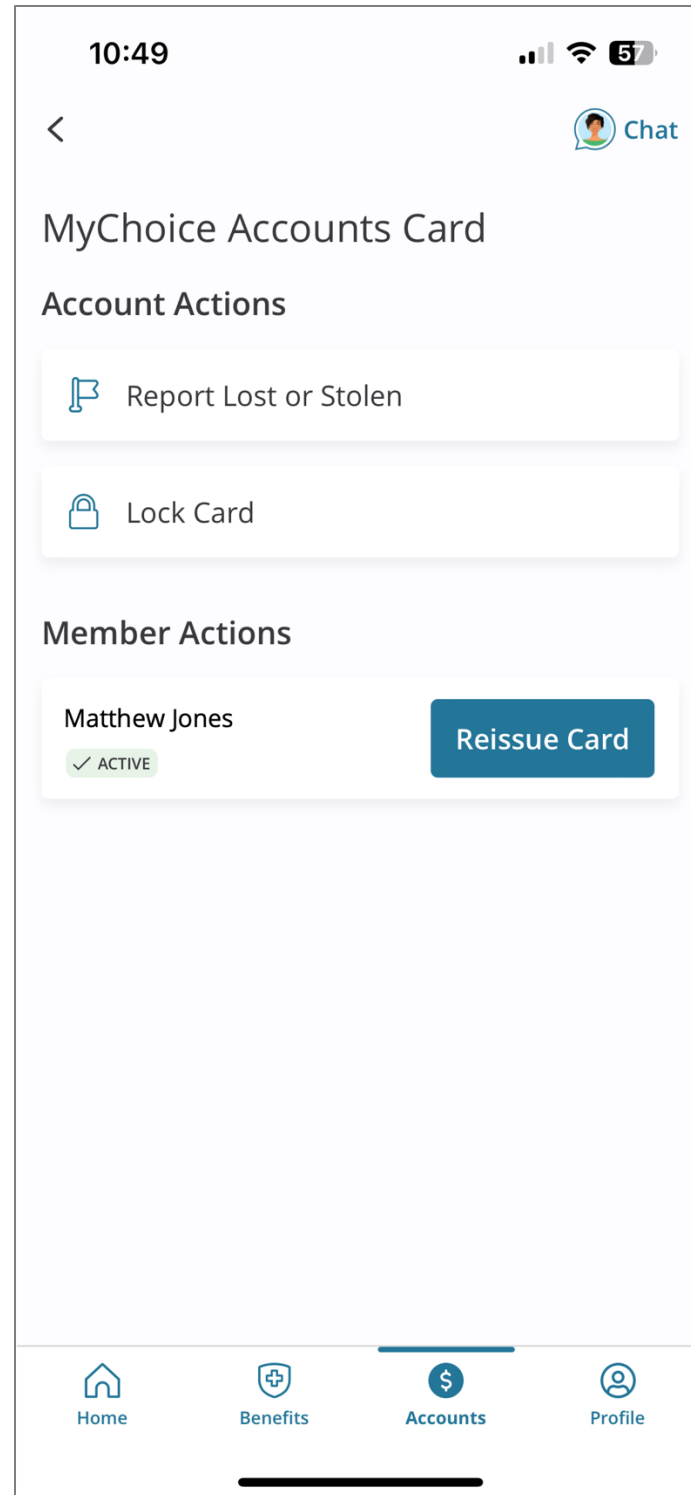
Reimbursement will usually occur within 2-5 business days.



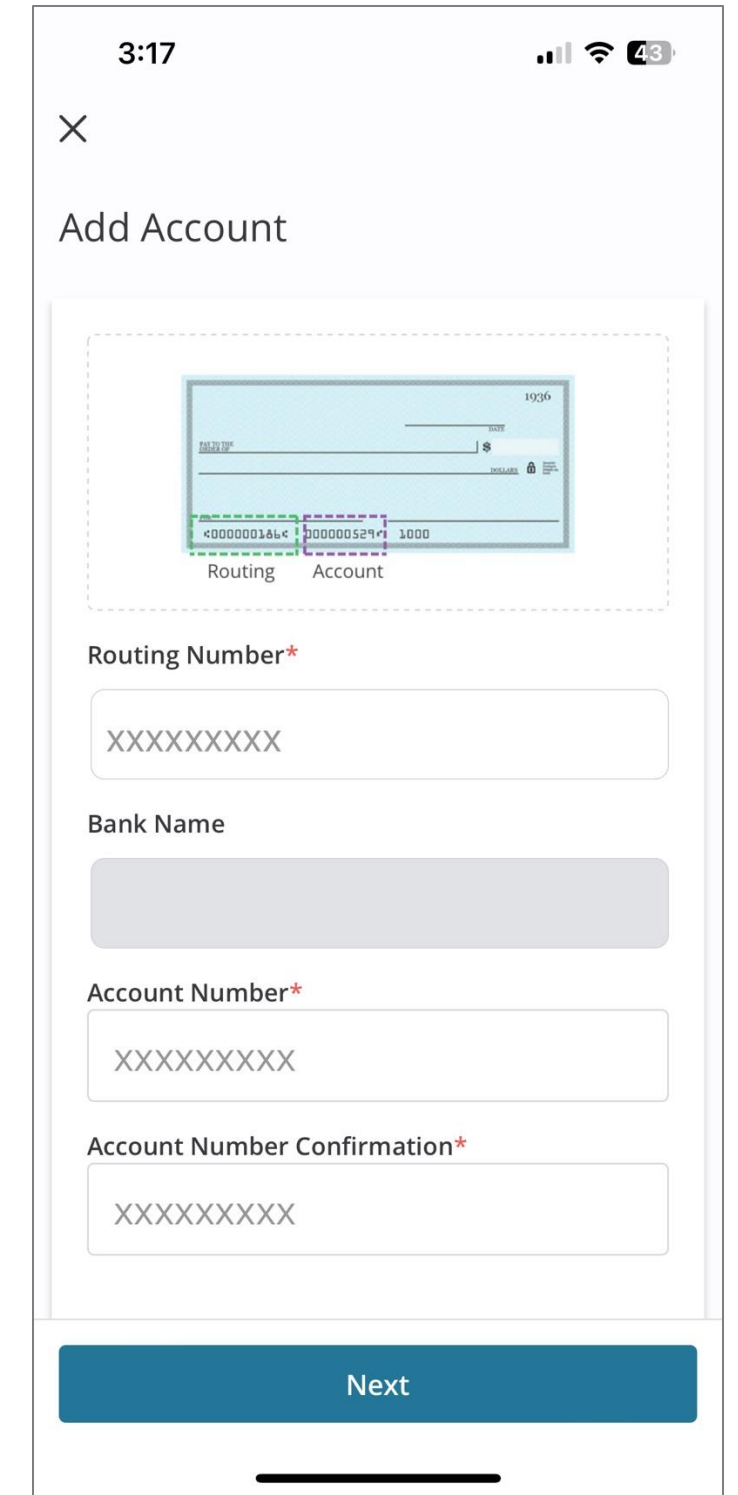
# ▶ Manage: Cards, Providers, Bank Account



Manage Cards



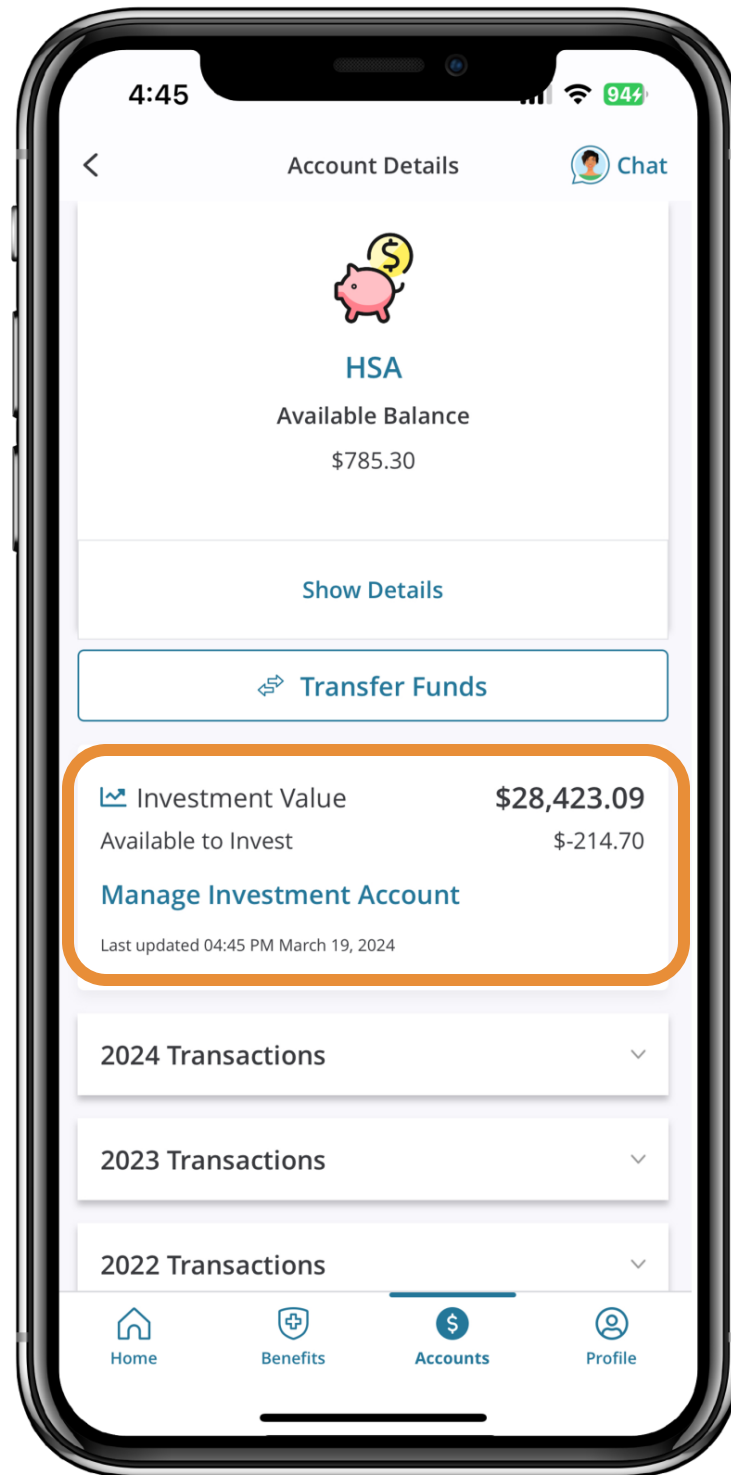
Manage Providers



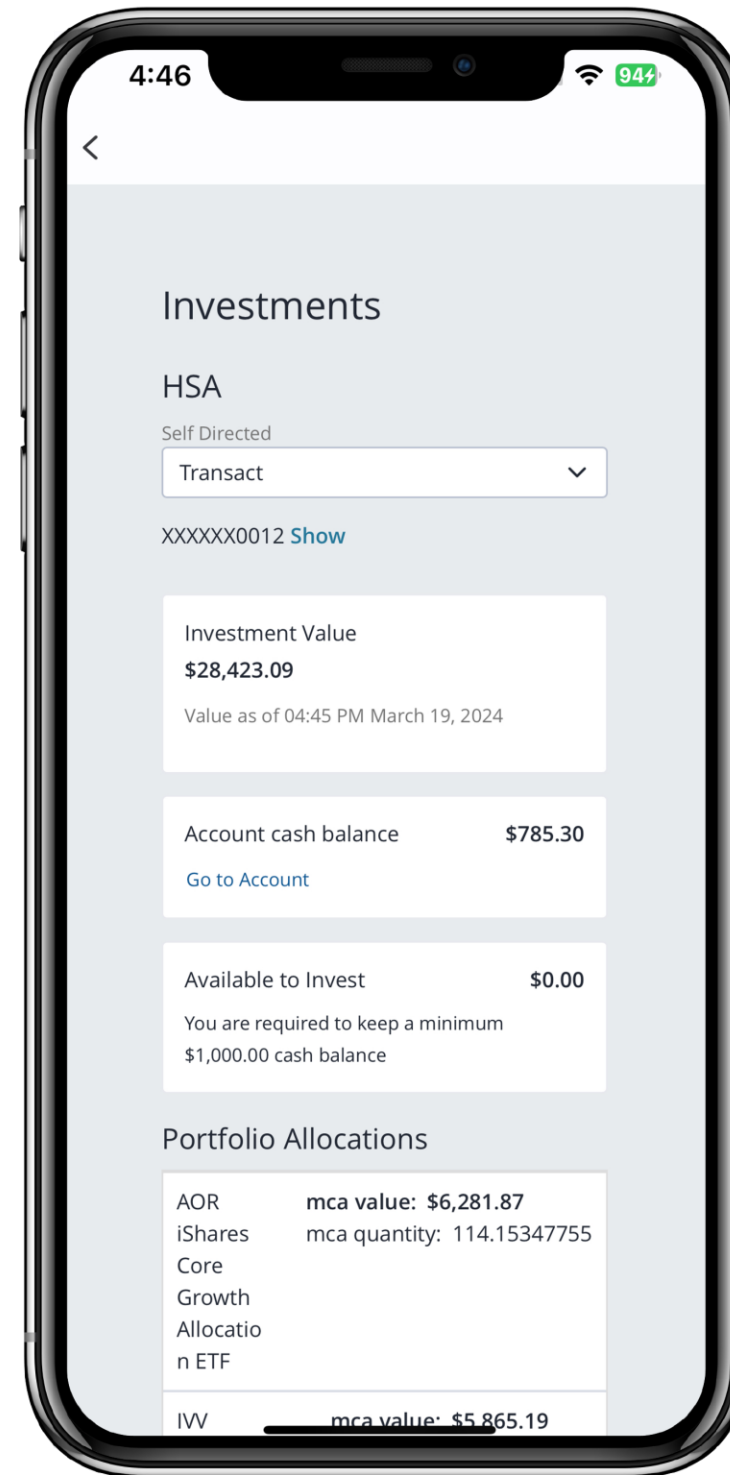
Manage Bank Account



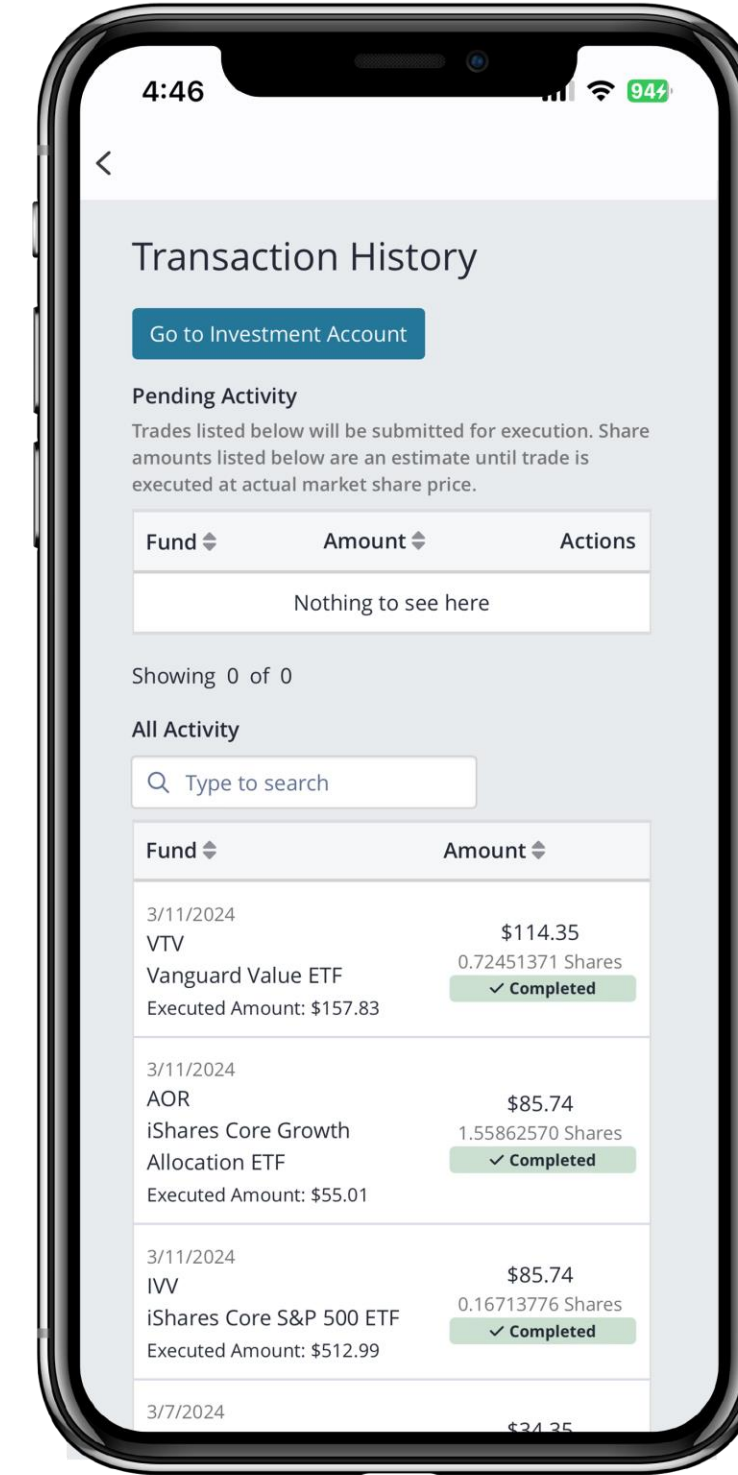
# HSA Investments



HSA Account page



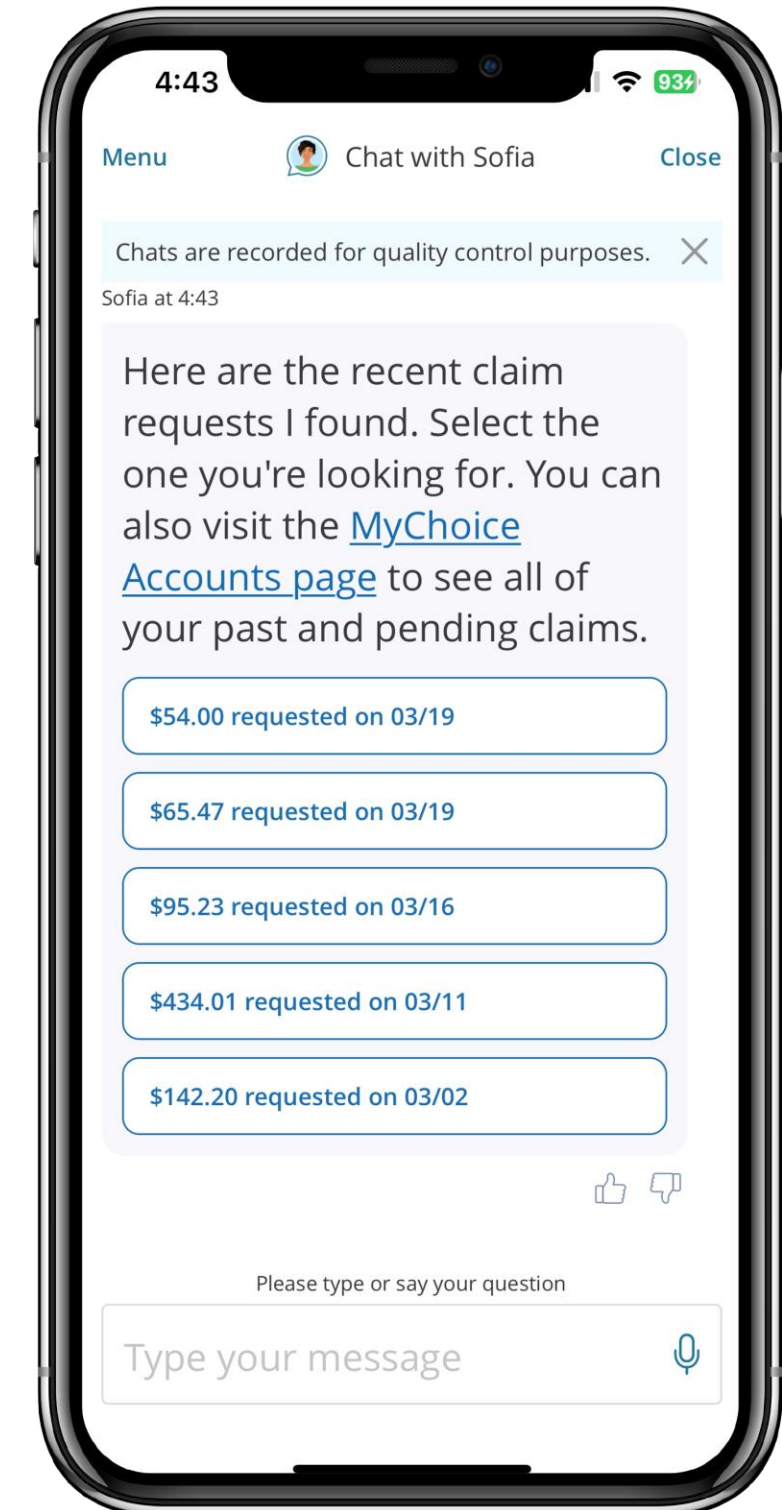
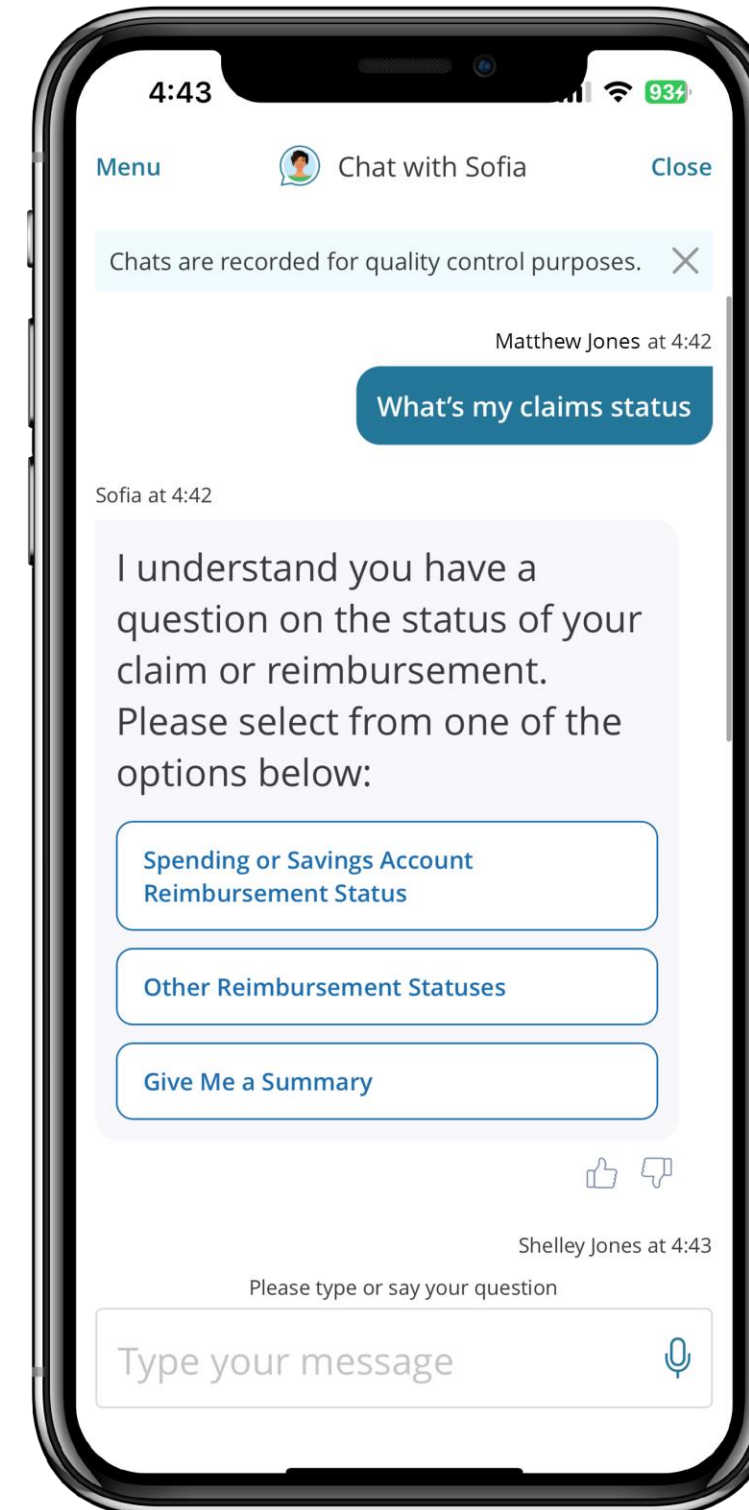
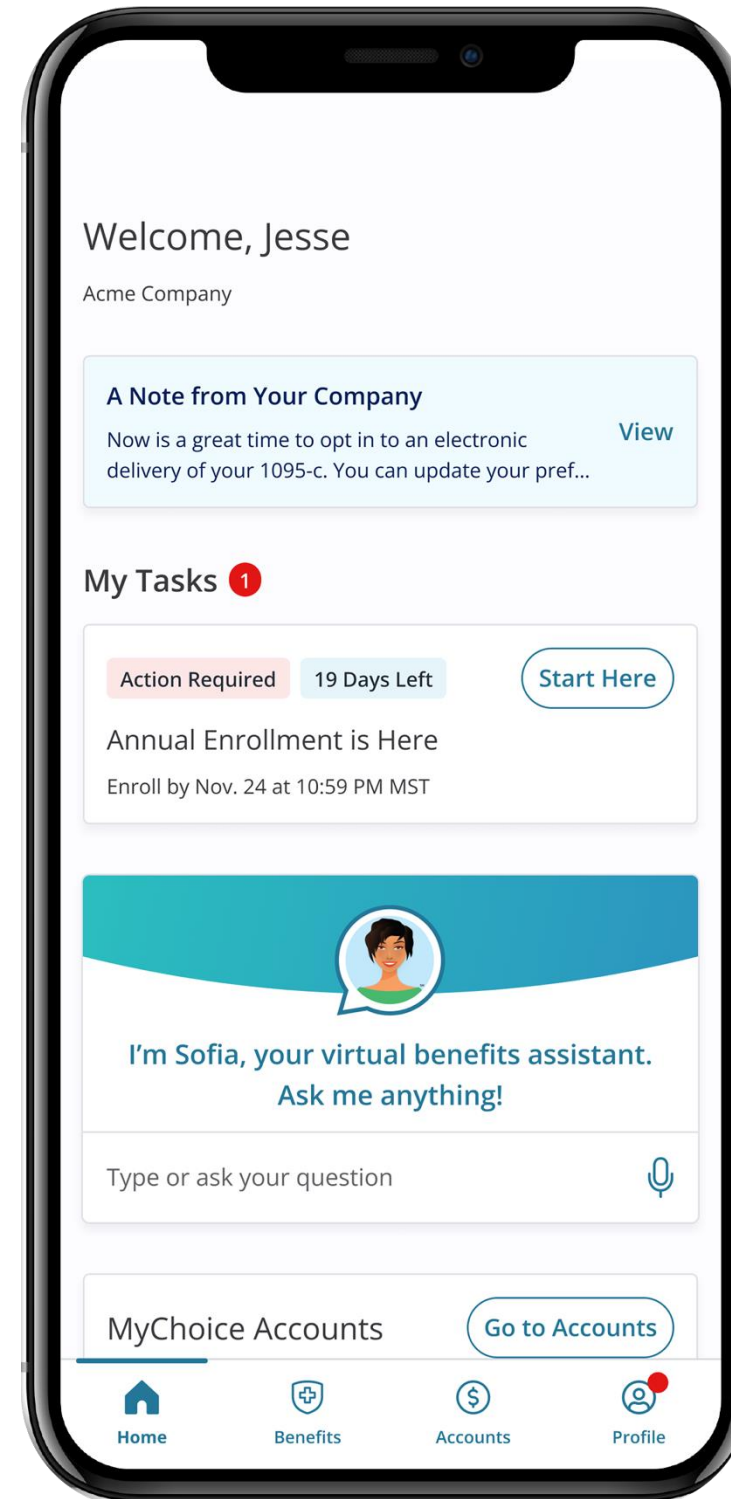
Investment Dashboard



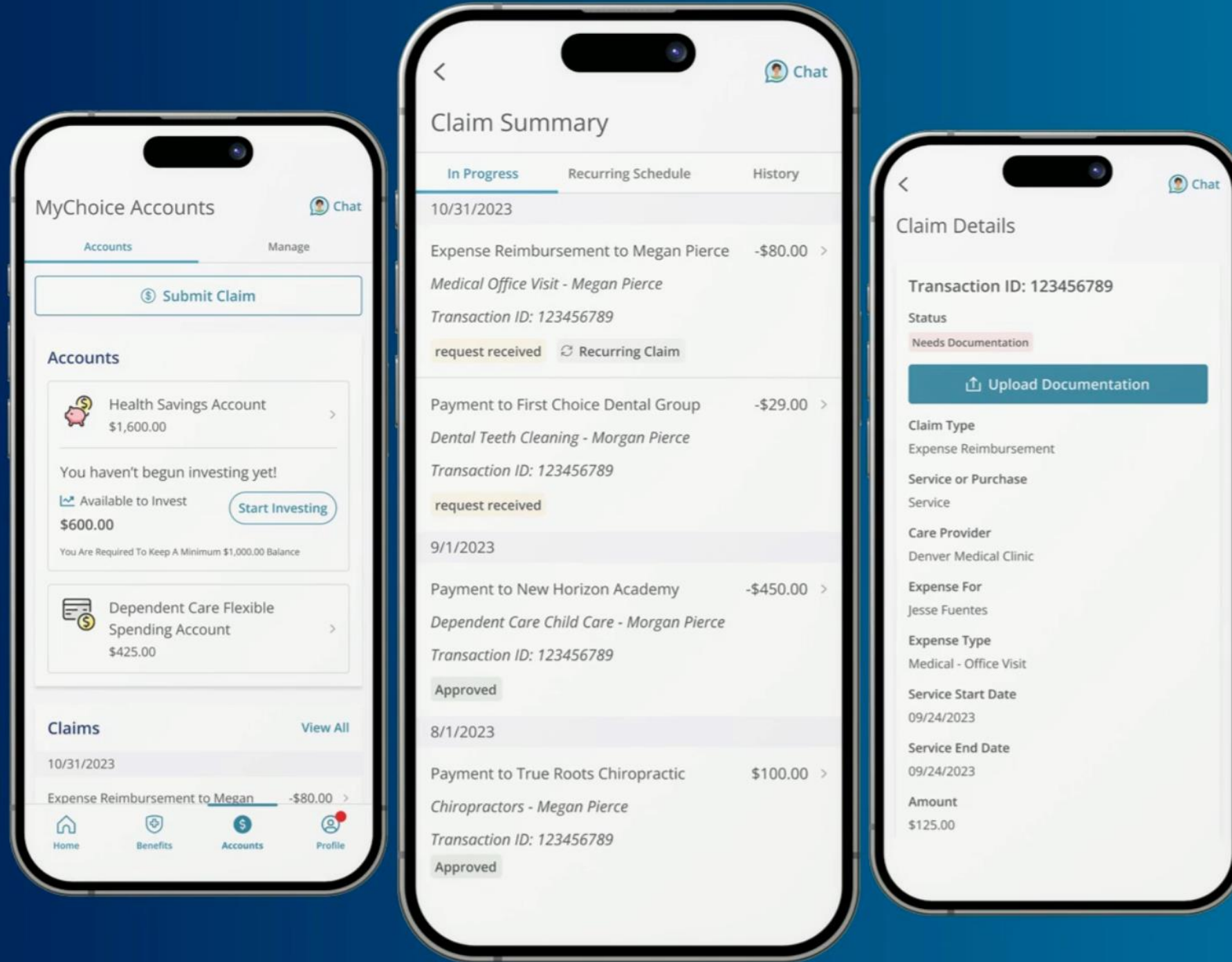
Investment History

# ▶ MyChoice Mobile App AI Support

- ▶ AI-enabled with our live chatbot, Sofia
- ▶ Participants can ask questions and get answers in real time
- ▶ 33% of members use Sofia on nights and weekends to get speedy answers
- ▶ She knows balances, debit card info, claims submission deadlines, last five claims submitted, and more.



# ▶ Video Demo





# Technology, Powered by *People*

Market Leader in Benefits Technology and Innovation