




Member: System Emails

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# 1. Welcome to MyChoice® Accounts

Trigger: New account opened



Hello [[member\_fname]],

Welcome to MyChoice Accounts!

You recently enrolled in one or more MyChoice Accounts through [[companyname]] benefits program. You will receive account updates from this email address. In the meantime, here are some quick tips to start managing your account.

**Your Benefits Website**

You can manage your savings and spending accounts from your benefits portal, [[websiteurl]]. Once logged in, select your name in the right-hand corner and choose **MyChoice Accounts** from the dropdown menu. If you have not logged in to the portal before, you will need to **Register** to set up a username and password. Your case-sensitive Company Key is [[companykey]].

**Your MyChoice Mobile App**

View your MyChoice Accounts on your mobile device. With the MyChoice Mobile App, you can easily manage your accounts whenever you need to, and wherever you are. Simply visit your device's app store and search for **MyChoice Mobile App**. Follow the prompts on the app to get logged in.

## MANAGE MY ACCOUNT

**Manage Your Accounts**

No matter which accounts you have, you can manage them all in the same place. Whether you visit your benefits site or the MyChoice Mobile App, you'll be able to:

- See your account balances in real time
- Upload documentation for reimbursable expenses
- Submit claims for reimbursement

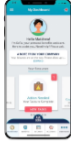
**Set Up Direct Deposit**

To ensure you receive your reimbursement as quickly as possible, we recommend setting up direct deposit right away. Follow the instructions below to get this started.

1. Log in to your benefits portal.
2. Navigate to the **MyChoice Accounts** page:
  - On the web: Look for the piggy bank icon that says **MyChoice Accounts**.
  - In the app: Select the **Accounts** tab at the bottom of the screen.
3. On the MyChoice Accounts page, you can access all your account information. To set up direct deposit, select the **Manage** tab and then choose **Bank Accounts**.
4. Select **+Add Account**
5. Follow the instructions on screen to complete the process.

**Start Using Your Account to Pay for Eligible Expenses**

Eligible expenses, which are determined by the IRS, can differ depending on your account type. To learn more about which expenses are eligible for your account, visit [MyChoice Accounts](#).



**MANAGE YOUR ACCOUNTS ANYTIME, ANYWHERE.**

**mychoice Accounts**

- SUBMIT DOCUMENTATION
- REVIEW TRANSACTIONS AND STATUS
- FILE A CLAIM OR REIMBURSEMENT

## MANAGE MY ACCOUNT

**Questions?**

If you have questions about your MyChoice Accounts, you can ask Sofia<sup>SM</sup>, your virtual benefits assistant. You can find her on your benefits portal or in the MyChoice<sup>®</sup> Mobile App. If she can't answer your question, she will connect you with someone who can.

**Learn More About MyChoice Accounts**

Curious about how MyChoice Accounts can benefit you and your family? Check out the [MyChoice Accounts](#) website to find everything you need to know!


To ensure your privacy is protected, we are unable to include specific benefit details in email communications.

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## 2. New Bank Account

Trigger: Anytime a new bank account is added/changed/etc. for security reasons



mychoice<sup>™</sup>  
Accounts



Hello [[member\_fname]] [[member\_lname]],

**A new bank account was added to your account.**

If you are aware of this recent change, then no action is needed. If you did not recently add a bank account to your account, please review your account and verify that your information is correct.

**Review your account information today:**

1. Log in to your benefits website and select your name in the top right corner of the page.
2. Select **MyChoice Accounts**.
3. Select **Manage > Bank Accounts** from the navigation bar to view linked external accounts.

**MANAGE MY ACCOUNT**

**Link not working?** Follow these steps:



1. Log into [[websiteurl]]
2. If you do not have credentials, follow the prompts to create one.
3. Your company key is: [[companykey]]

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## 3. Bank Account Removal

Trigger: Anytime a bank account is removed



**A bank account linked to your MyChoice Accounts has been deleted.**

If you are aware of this recent change, then no action is needed. If you did not recently change your banking information, please review your account and verify that your information is correct.

**TO REVIEW YOUR ACCOUNT INFORMATION:**

1. Log in to your benefits website and select your name in the top right corner of the page
2. Select **MyChoice Accounts**
3. Select **Manage > Bank Accounts** from the navigation bar to view banking details

**MANAGE MY ACCOUNT**

**Link not working?** Follow these steps:

1. Log into [[websiteurl]]
2. If you do not have credentials, follow the prompts to create one.
3. Your company key is: [[companykey]]


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## 4. New Card Requested

Trigger: Member or someone on behalf of member requests an additional debit card



**mychoice™**  
Accounts

**This email is to inform you that a new dependent debit card was requested for your MyChoice Account(s).**

If you are aware of this recent request, then no action is needed. If you did not recently request to add a dependent card to your account, please review your account and verify that your information is correct.

**TO REVIEW YOUR ACCOUNT INFORMATION:**

1. Log in to your [benefits website](#) and select your name in the top right corner of the page
2. Select **MyChoice Accounts**
3. Select **Manage > Cards** from the navigation bar to view card detail

**Manage My Account**

**Link not working?** Follow these steps:

1. Log into [\[\[websiteurl\]\]](#)
2. If you do not have credentials, follow the prompts to create one.
3. Your company key is: [\[\[companykey\]\]](#)

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## 5. Card needs documentation

Trigger: Member has swiped debit card, but is missing documentation or needs additional documentation to substantiate the claim



Hello [[member\_fname]],

We require further information from you regarding your recent MyChoice Accounts debit card transaction.

**\*ACTION REQUIRED\***

Please review the transaction information below and submit documentation.

**Transaction ID:** [[Request.requestNum]]

**Date of Service/Purchase:** [[Request.dateOfServiceStart]]

**Amount of Service/Purchase:** [[Request.amount]]

**To review your account information:**

1. Log in to your benefits portal or the MyChoice Mobile App and navigate to the **MyChoice Accounts** page.
  - o **On the web:** Look for the piggy bank icon that says **MyChoice Accounts**.
  - o **On the app:** Select the **Accounts** tab at the bottom of the screen.
2. Select **Claims > Claim Summary** from navigation bar.
3. Select the **Action Required** tab.
4. Provide the required documentation for the transaction identified above.

**Please note:** If you do not provide supporting documentation for the transaction within 90 days, your account may be suspended according to IRS regulations. You will then be required to repay your account for the amount of the transaction to avoid further penalties.

### MANAGE MY ACCOUNT



**MANAGE YOUR ACCOUNTS ANYTIME, ANYWHERE.**

**mychoice**  
Accounts

- SUBMIT DOCUMENTATION
- REVIEW TRANSACTIONS AND STATUS
- FILE A CLAIM OR REIMBURSEMENT

### Questions?

If you have questions about your MyChoice Accounts, you can ask Sofia<sup>SM</sup>, your virtual benefits assistant. You can find her on your benefits portal or in the MyChoice<sup>®</sup> Mobile App. If she can't answer your question, she will connect you with someone who can.

### Learn More About MyChoice Accounts

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## 6. Card swipe declined

Trigger: Member has swiped card and the card was declined (can be for various reasons)



Hello [[member\_fname]],

We saw that you tried to use your MyChoice Accounts card and it didn't go through.

Please review your recent transactions on MyChoice Accounts for a more detailed reason for denial.


**To review your account information:**

1. Log in to your benefits portal or the MyChoice Mobile App and navigate to the **MyChoice Accounts** page.
  - o **On the web:** Look for the piggy bank icon that says **MyChoice Accounts**.
  - o **On the app:** Select the **Accounts** tab at the bottom of the screen.
2. Select **Claims > Claim Summary** from navigation bar.
3. Select the **History** tab.
4. Look for a transaction with a status of **Ineligible** to review denied transactions.

You should also review the Action Required tab to ensure any outstanding transactions are addressed to avoid future transactions using your card to be declined.

**Please note:** If you believe the transaction was denied in error, you can submit documentation, such as a receipt, as a manual claim for reimbursement, and we will review it further. You can upload your documentation online or via the app.

**MANAGE MY ACCOUNT**



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## 7. Payment Request Received

Trigger: a reimbursement/claim request has been submitted. Acknowledgment.



Hello `[[member_fname]]`,


We have received a request for payment from your MyChoice Account. If you are aware of this request, then no action is needed. If you did not recently request to be paid from your account, please review your account information and verify that your information is correct.

**To review your account information:**

1. Log in to your benefits portal or the MyChoice Mobile App and navigate to the **MyChoice Accounts** page.
  - o **On the web:** Look for the piggy bank icon that says **MyChoice Accounts**.
  - o **On the app:** Select the **Accounts** tab at the bottom of the screen.
2. Select **Claims > Claim Summary** from navigation bar.
3. Select the **Action Required** tab.
4. Look for a transaction with a status of **Documentation Received** to review transaction details.

If the payment request was made in error, you can cancel the transaction directly on the transaction details page.

**MANAGE MY ACCOUNT**



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**mychoice** Accounts

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## 8. Request Approved Notice

Trigger: Submitted request or claim has been approved and reimbursement has been triggered.



Hello [[member\_fname]] [[member\_lname]],

**We wanted to let you know that we recently approved a request for payment from your account.**

If you are aware of this recent request, then no action is needed. If you did not recently request to be paid from your account, please review your account information and verify that your information is correct.

You will receive a separate notice when your payment is sent.

**How to Review Your Account**

1. Log in to your benefits website and select your name in the top right corner of the page.
2. Select **MyChoice Accounts**.
3. From this page, you can review all recent MyChoice Accounts transactions.

**MANAGE MY ACCOUNT**

**Link not working?** Follow these steps:


1. Log into [[websiteurl]]
2. If you do not have credentials, follow the prompts to create one.
3. Your company key is: [[companykey]]

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## 9. Payment Sent

Trigger: Member reimbursement request has been approved and payment is on the way.




Hello [[member\_fname]],

Good news! We recently sent a payment from your MyChoice Account. If you are aware of this recent request, then no action is needed on your part. If you did not recently request to be paid from your account, please review your account information and verify that your information is correct.

**To review your account information:**

1. Log in to your benefits portal or the MyChoice Mobile App and navigate to the **MyChoice Accounts** page.
  - o **On the web:** Look for the piggy bank icon that says **MyChoice Accounts**.
  - o **On the app:** Select the **Accounts** tab at the bottom of the screen.
2. Select **Claims > Claim Summary** from navigation bar.
3. Select the **Action Required** tab.
4. Look for a transaction with a status of **Approved** to review transaction details.

**MANAGE MY ACCOUNT**



**MANAGE YOUR ACCOUNTS ANYTIME, ANYWHERE.**

**mychoice Accounts**

- SUBMIT DOCUMENTATION
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**Questions?**

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# 10. Payment Request Denied

Trigger: Member submitted a manual claim and claim has been denied



Hello [[member\_fname]],

We wanted to let you know that your recent MyChoice Accounts request for payment has been denied. To ensure all information was processed appropriately, please review your recent payment request and verify it is accurate. If further information is required to approve your request, please have all documentation available to attach for review.

**Your Recent Request For Payment:**


**Transaction ID:** [[Request.requestNum]]  
**Date of Service/Purchase:** [[Request.dateOfServiceStart]]  
**Amount of Service/Purchase:** [[Request.amount]]

If you feel the request was processed inaccurately, you have 60 days to submit an appeal through the benefits portal or app by clicking Appeal Request under the action dropdown on the Account Activity section of your account. Follow the instructions below to access your account.

**To review your account information:**

1. Log in to your benefits portal or the MyChoice Mobile App and navigate to the **MyChoice Accounts** page.
  - o **On the web:** Look for the piggy bank icon that says **MyChoice Accounts**.
  - o **On the app:** Select the **Accounts** tab at the bottom of the screen.
2. Select **Claims > Claim Summary** from navigation bar.
3. Select the **Action Required** tab.
4. Look for the transaction noted above to review additional details.

**MANAGE MY ACCOUNT**



**MANAGE YOUR ACCOUNTS ANYTIME, ANYWHERE.**

**mychoice** Accounts

- SUBMIT DOCUMENTATION
- REVIEW TRANSACTIONS AND STATUS
- FILE A CLAIM OR REIMBURSEMENT

### Disagree with this decision?

If you feel the request was denied inaccurately, you have 60 days from the date of the denial to submit an appeal. Should you have specific questions on the appeal process, please reference the appeal policy. Appeals can be submitted via email, fax, or mail.

**Email:** [claims@mychoiceaccounts.com](mailto:claims@mychoiceaccounts.com)

**Fax:** 855-883-8542

**USPS Mail:** MyChoice Accounts, MSC 345475, PO Box 105168, Atlanta, GA 30348-5168

When submitting your appeal, please be sure to include all necessary information, including any reference to the eligibility of your expense(s), as stated in the appeal policy, to ensure a complete review of your appeal.

Please attach copies of documents that support your claim, such as a physician's letter of medical necessity, Explanation of Benefit (EOB) from your insurance plan, and/or detailed statements from your provider. If you choose, you may also submit information such as operative reports, medical records or other medical details that support your claim.

### Questions?

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# 11. Debit Card Locked

Trigger: Member has locked their card [security alert]



**Hello! We received your request to lock the debit card associated with your MyChoice Accounts.**

If you are aware of this recent change, then no action is needed. If you did not recently request to lock a card linked to your account, please review your account and verify that your information is correct.

**PLEASE NOTE: When the account holder's debit card is locked, all subsequent cards and dependent cards will be placed under locked status as well.**

**TO REVIEW YOUR ACCOUNT INFORMATION:**

1. Log in to your benefits website and select your name in the top right corner of the page
2. Select **MyChoice Accounts**
3. Select **Manage > Cards** from the navigation bar to view card details

**MANAGE MY ACCOUNT**

**Link not working?** Follow these steps:

1. Log into [[websiteurl]]
2. If you do not have credentials, follow the prompts to create one.
3. Your company key is: [[companykey]]


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# 12. Debit Card Reported Lost/Stolen

Trigger: Typically when member reports card lost/stolen, but in case of fraud, alerts member that card has been reported [security alert]



**This email is to inform you that a debit card associated with your MyChoice Accounts was recently reported lost or stolen.**

If you are aware of this recent change, then no action is needed. If you did not recently report a card lost or stolen, please review your account and verify that your information is correct.

**PLEASE NOTE: When the account holder's debit card is locked, all subsequent cards and dependent cards will be placed under locked status as well.**

**TO REVIEW YOUR ACCOUNT INFORMATION:**

1. Log in to your benefits website and select your name in the top right corner of the page
2. Select **MyChoice Accounts**
3. Select **Manage > Cards** from the navigation bar to view card details

**MANAGE MY ACCOUNT**

**Link not working?** Follow these steps:

1. Log into [[websiteurl]]
2. If you do not have credentials, follow the prompts to create one.
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# 13. Account Suspended

Trigger: Suspended account due to unsubstantiated claim, based on client-level timings



Dear [[member\_fname]],

Your MyChoice Account has been suspended because we were unable to verify a card swipe. You will be unable to use your card to access available funds in this account until you have either provided supporting documentation or repaid your account for the outstanding amount.

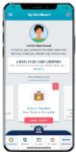
**\*ACTION REQUIRED\***

Please review your outstanding transactions and either submit the needed documentation or repay your account for the outstanding amount to reinstate your account.

**To review your account information:**

1. Log in to your benefits portal or the MyChoice Mobile App and navigate to the **MyChoice Accounts** page.
  - o **On the web:** Look for the piggy bank icon that says **MyChoice Accounts**.
  - o **On the app:** Select the **Accounts** tab at the bottom of the screen.
2. Select **Claims > Claim Summary** from navigation bar.
3. Select the **Action Required** tab.
4. Look for all transactions with a status of **Outstanding**.

**MANAGE MY ACCOUNT**



**MANAGE YOUR ACCOUNTS ANYTIME, ANYWHERE.**

**mychoice** Accounts

- SUBMIT DOCUMENTATION
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### Cannot provide the required documentation?

If you are unable to provide the required documentation, you will need to repay your account in order to reinstate your account. You have three options to repay your account:

1. Submit a new claim for other eligible expenses incurred in the same plan year that the outstanding transaction occurred (and not previously reimbursed) to offset the outstanding balance. If you choose to submit a new claim, upload your documentation by clicking **Submit Claim**. You will need to provide documentation to support the claim such as a provider-issued itemized receipt or explanation-of-benefits from your insurance provider.
2. Mail a check for the outstanding amount. Please include the transaction ID on the check memo line. Checks can be mailed to:

Businessolver  
PO Box 870747  
Kansas City, MO 64187-0747

### Questions?

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# 14. Account Reinstated

Trigger: Member with a suspended account has satisfied claim documentation or repaid account



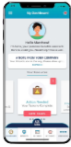
Dear [[member\_fname]],

Your MyChoice Account has been unsuspended. You can resume using your account and the associated Visa debit card for account-eligible expenses and/or purchases.

To review your account information, log in to your benefits portal or the MyChoice Mobile App and navigate to the **MyChoice Accounts** page.

- **On the web:** Look for the piggy bank icon that says **MyChoice Accounts**.
- **On the app:** Select the **Accounts** tab at the bottom of the screen.

**MANAGE MY ACCOUNT**



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# 15. Claim Needs Documentation

Trigger: Member has submitted a manual claim, claim has been reviewed, and is missing documentation or needs additional documentation



mychoice™  
Accounts

Hello [[member\_fname]],

We wanted to let you know that we require further documentation from you regarding your recent MyChoice Accounts payment request.

Please refer to the information below to identify which request for payment requires further documentation:

**Transaction ID:** [[Request.requestNum]]  
**Date of Service/Purchase:** [[Request.dateOfServiceStart]]  
**Amount of Service/Purchase:** [[Request.amount]]

**\*ACTION REQUIRED\***


Please review the above payment request and submit documentation that contains the following:

- Date service or expense was incurred
- Amount
- Service provided
- Name and address of the provider or merchant
- Name of person who incurred the service or expense

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  - **On the app:** Select the **Accounts** tab at the bottom of the screen.
2. Select **Claims > Claim Summary** from navigation bar.
3. Select the **Action Needed** tab.
4. Look for the transaction identified above and use the **Upload Documentation** button to add a supporting document to the claim, such as a receipt or an explanation-of-benefits from your insurance provider.

**MANAGE MY ACCOUNT**



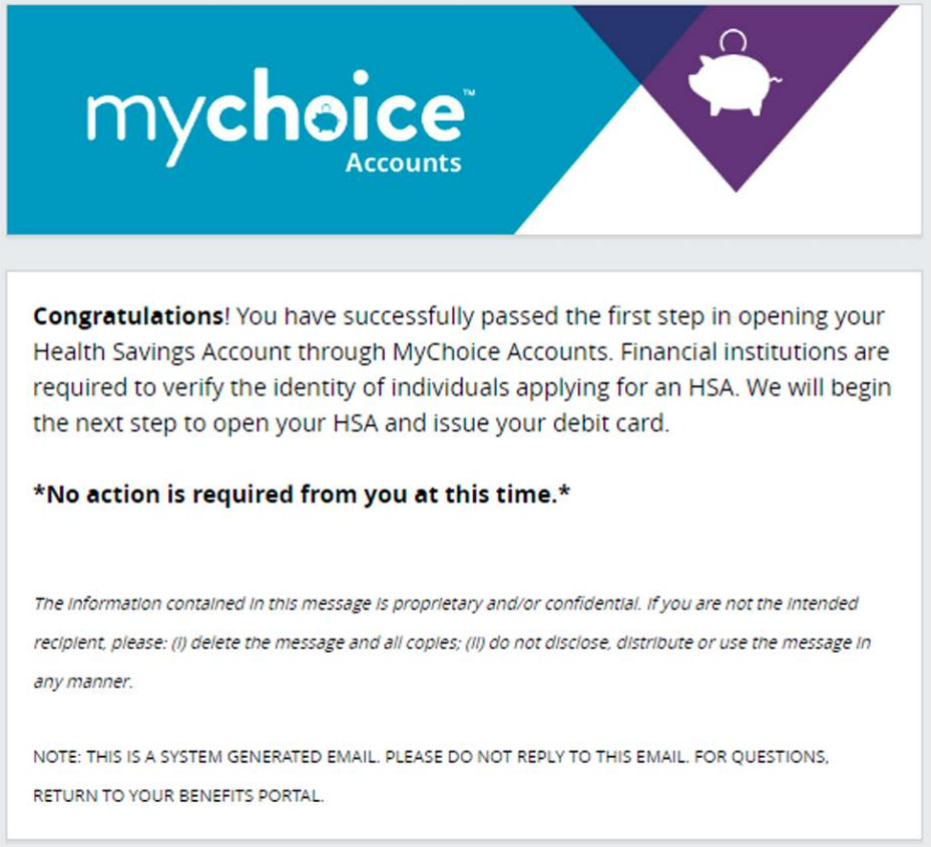
**MANAGE YOUR ACCOUNTS ANYTIME, ANYWHERE.**

mychoice™  
Accounts

- SUBMIT DOCUMENTATION
- REVIEW TRANSACTIONS AND STATUS
- FILE A CLAIM OR REIMBURSEMENT


# 16. CIP Approval Notice

Trigger: Member has enrolled in an HSA, and has passed CIP to open their account.



## 17. CIP Failure Notice

Trigger: Member has enrolled in an HSA, but information is not sufficient to pass CIP initially (additional notices sent from UMB. See the [CIP Process document](#) for more details).



**Hello! We are currently processing your enrollment for your Health Savings Account.**

**\*ACTION REQUIRED\***

To complete the enrollment in your Health Savings Account, please provide copies of the following documents:

1. A copy of your state-issued driver's license, state-issued ID or passport to confirm your date of birth.
2. A copy of your Social Security card to confirm your Social Security number.

Please note, if we do not receive the documentation necessary to validate your identity, your HSA will not be established. Financial institutions are required to verify the identity of individuals applying for an HSA.

Please send documentation using one of the secure methods below:

**Email:**  
[hsa.cipsupport@umb.com](mailto:hsa.cipsupport@umb.com)  
(If you would like to request a secure email connection, please email that request prior to sending your documentation. A secure email will be sent for your use.)

**Mail:**  
UMB Healthcare Services  
PO Box 419226  
Attn: CIP UPDATE (MS: 1020502)  
Kansas City, MO 64141-6226

*The information contained in this message is proprietary and/or confidential. If you are not the intended recipient, please: (I) delete the message and all copies; (II) do not disclose, distribute or use the message in any manner*

NOTE: THIS IS A SYSTEM GENERATED EMAIL. PLEASE DO NOT REPLY TO THIS EMAIL. FOR QUESTIONS, RETURN TO YOUR BENEFITS PORTAL.