



# MyAmeriflex Portal Guide

Streamline the out-of-pocket expense reimbursement process and give 24-hour access to Benefit Convenience Card information.



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## Getting Started

The MyAmeriflex Portal can be accessed by visiting the following URL:

<https://ameriflex.wealthcareportal.com/Page/Home>

### Registration

**Step 1:** If this is your first time accessing MyAmeriflex Portal, 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
- ▶ Use your Social Security Number (no dashes) as the Employee ID

Your Benefit Convenience Card (BCC) number can be used in place of your Social Security Number/Employee ID in the registration ID field.

The Employer ID is your group's code: **AMFHOMECA**

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.

The sign-in screen features a lock icon at the top, followed by a confidentiality statement: "We will maintain the confidentiality of your personal information in accordance with our privacy policy." Below this is a "Sign in" heading. A "Username" label is positioned above a text input field. A link "Forgot your Username? Let us help" is located below the input field. A blue button with a checkmark icon and the text "SIGN IN" is positioned below the link. A light blue informational box contains an "i" icon and the text: "To protect your personal information, we collect your password on a separate page." At the bottom, a link "Don't have an account?" is above a blue button with a person icon and the text "REGISTER".

The registration form contains several fields with labels and icons: "Username \*" with a tag icon, "Password \*" with a lock icon, "Confirm Password \*" with a lock icon, "First Name \*" with a person icon, "Initial" with a person icon, "Last Name \*" with a person icon, "Email \*" with an envelope icon, "Employee ID \*" with a person icon, and "Registration ID \*" with a person icon. The "Registration ID" field is a dropdown menu currently showing "Employer ID". A "Password Strength" indicator is located between the "Password" and "Confirm Password" fields. At the bottom, there is a checkbox next to the text "I accept Terms of Use".

## Secure authentication

After the registration form is successfully completed, you will be prompted to complete the secure authentication setup process. This important step helps ensure your account is secure and private.

**Step 1:** Select your security questions. From the list, please select four security questions and provide 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*.

The screenshot shows a web form titled "Register - Secure Authentication". At the top, there is a progress bar with four steps: STEP 1, STEP 2, STEP 3 (highlighted in green), and STEP 4. The form contains the following fields and elements:

- First Name: Test
- Last Name: Account
- Confirm Email \*: jsmith@website.com
- A light blue information box with an 'i' icon: "The email address entered is used for security encryption only. It is not used for solicitation purposes."
- At the bottom, there are two buttons: "CANCEL" (with a close icon) and "NEXT" (with a checkmark icon).

**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 need to enter your username, answer security questions, and enter your password on all subsequent login attempts.

## Navigate your online experience

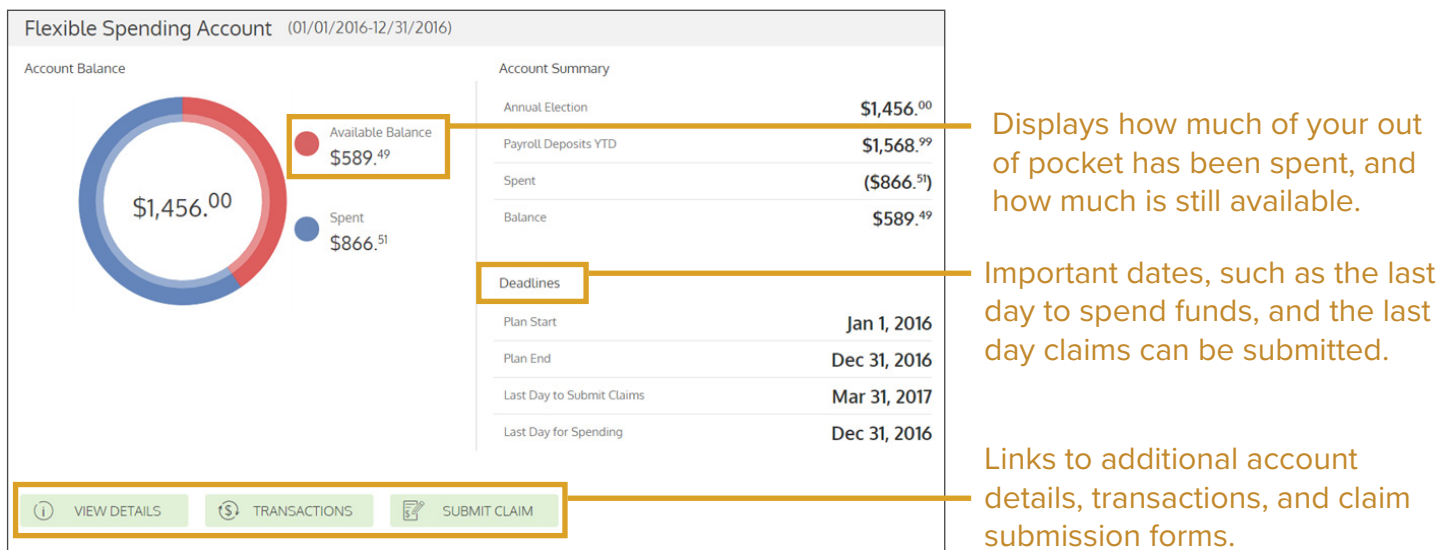
The navigation bar is located atop every page in the portal and gives you instant access to key areas and functions in the portal.



- 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 Benefit Convenience Card(s).
- 4. Alerts:** View important account alerts.
- 5. Communication Settings:** Manage your email and SMS text alert settings & preferences.
- 6. User Profile:** View and manage your profile settings.
- 7. Log Out:** End your session.

## Checking your account balance(s)

Navigate to the My Accounts page to access a quick view of your Benefit Convenience Card 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

MyAmeriflex Portal 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 an expense?

**Claim:** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.

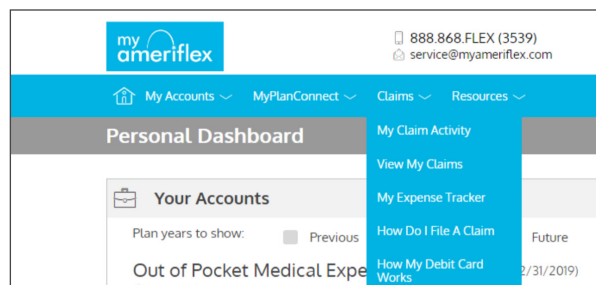
**Expense:** Expenses are used to track and manage your out of pocket eligible medical expenses. Expenses can be manually entered by you, or can also be automatically fed into your profile via electronic data feeds from your insurance carrier. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or at later date.

### Submitting a claim

To enter a claim and request reimbursement, navigate to the add claim page (by clicking submit claim or via the menu bar) 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.

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

**\*\*Tip:** Use the Pay Provider function during the runout period in Jan-Mar 31 every year for prior year's expenses.

The screenshot shows the 'Add Claim' form. It has a title bar 'Add Claim'. Below it, there's a section for 'Required Field' with several input fields: 'Claimant' (dropdown with 'Steve Sample'), 'Reimbursement Method' (dropdown with 'Card'), 'Service Start Date' (date picker), 'Service End Date' (date picker), 'Service Type' (dropdown with '-- Select One --'), 'Claim Amount' (text input with '\$ 0.00'), and a checkbox 'Would you like to submit this as a recurring payment?' with 'Yes' and 'No' options. Below these are 'Provider Name' (text input), 'Comments' (text area), and 'Upload Receipt' (text input with a 'BROWSE' button). At the bottom, there's a 'DRAG & DROP your receipts here' area with a plus icon. At the very bottom, there are 'SUBMIT' and 'CANCEL' buttons.

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.

## Adding an expense for future payment

To enter an expense, open the *add expense for future payment* page and complete the form. Be sure to include the information below with your EOB.

### ► Amount your provider charged:

Full amount billed for services provider.

### ► Insurance allowed amount:

The maximum amount your health insurance plan will pay for services provided.

### ► Amount covered by insurance:

The amount covered by your health insurance plan.

### ► Amount you paid out-of-

**pocket:** The cost included in the insurance allowed amount that is 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.

## 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	<b>Claim</b> Date of Service: Oct 26, 2016 <a href="#">REQUEST REIMBURSEMENT</a>
Approved/Paid/Submitted		
(\$32.99)	Paid	<b>Claim</b> Date of Service: Nov 4, 2016 Date of Transaction: Nov 9, 2016
(\$43.99)	Paid	<b>Claim</b> Date of Service: Nov 3, 2016 Date of Transaction: Nov 9, 2016
(\$54.00)	Paid	<b>Claim</b> Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016
(\$8.00)	Paid	<b>Claim</b> Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016
\$100.00	Submitted	<b>Claim</b> Date of Service: Oct 26, 2016 <a href="#">ADD RECEIPT</a>
Page 1 of 1		
Denied		
\$34.00	Denied	<b>Claim</b> Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016

## Resolving pending debit card transactions

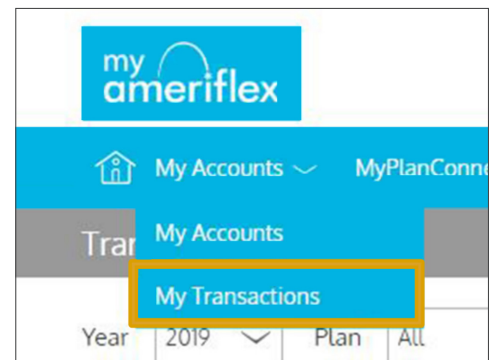
If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

**Step 1:** Navigate to the *transactions* page.

**Step 2:** Locate 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.

Our claims team will review the documentation you've submitted and update the transaction accordingly.



my  
ameriflex

888.868.FLEX (3539)  
service@myameriflex.com

My Accounts

MyPlanConnect

Claims

Resources

Jane Doe  
Last login:  
2:31pm on May 13, 2019

0

log out

Transactions

Year2019PlanAllTypeAll

EXPORT TO EXCEL

Which transactions do you want to see? Select here

☒ Approved/Posted

☒ Pending/Processing

☒ Authorized

☒ Denied

SEARCH FOR TRANSACTIONS

PRINT TRANSACTIONS

(\$6,000.00)

Date Of Service

Description

Claimant

Account Type

Plan Start Date

Plan End Date

Premium Reimbursement Account Approved

Feb 22, 2019

Payroll Deposit

Jane Doe

PRM

Jan 1, 2014

Dec 31, 2099

Deposit Payroll Deposit

Feb 22, 2019

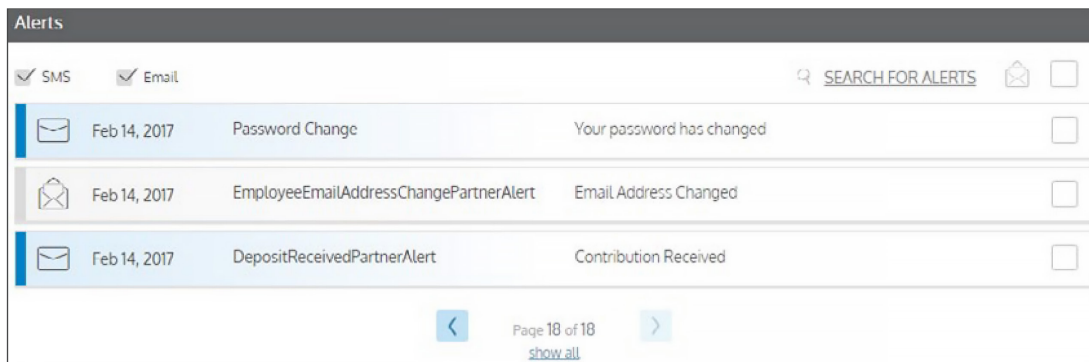
PRINT



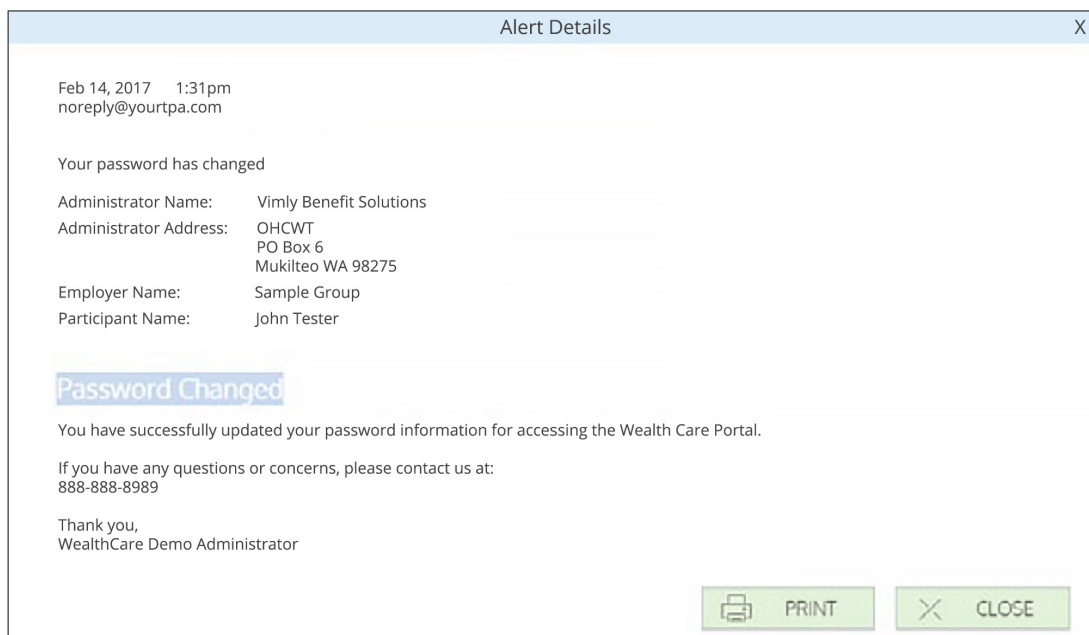
## Viewing and managing alerts & messages



The bell icon in the navigation bar indicates when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts 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 communication types.



Click on an individual message to see the full text:



## Changing your alert preferences

You can change whether you receive certain alert 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.

The envelope icon in the navigation bar indicates when you have unread messages awaiting review. These messages include copies of manual claim letters, receipt notification letters, and reimbursement letters. Similar to alerts, you can simply click any message item to see the letter text in full.

A screenshot of the 'Assigned Notifications' settings page. The page is divided into two main sections. The left section, titled 'Assigned Notifications', contains a table with columns for 'mobile', 'email', 'both', and 'none'. It lists various alert types such as 'Account Balance Alert', 'Account Deductible Met', 'Billing Address Change', 'Card Mailed', 'Card Transaction Approved', 'Card Transaction Denied', 'Completed HSA Payment Notice', 'Deposit Received', 'Enrollee Welcome Email', 'Failed HSA Payment Notice', 'Manual Claim Entered', 'Password Change', and 'Year End Reminder'. Each alert type has four radio buttons corresponding to the delivery methods. The right section contains fields for 'Email Address' (with a value 'email@email.com') and 'Phone Registration Status' (with a value '11234567891' and status 'Pending'). A 'SAVE' button is at the bottom left of the left section. A small information box on the right side of the phone registration status provides instructions on how to complete the registration process.A screenshot of the 'Messages' page. At the top, there are checkboxes for 'Unread' and 'Read', and a search bar labeled 'SEARCH FOR MESSAGES'. Below this is a list of messages. The first message is dated 'May 1, 2018' and is a 'Pending Letter'. The second message is dated 'Apr 17, 2018' and is a 'Pending Letter'. The third message is dated 'Apr 17, 2018' and is a 'Denial Letter'. Each message has a checkbox on the right. At the bottom, there are navigation arrows and a page indicator 'Page 1 of 1'.

**If you have any questions, you can contact the Ameriflex Participant Services team:**

**Monday - Friday, 8:30 a.m. - 8:00 p.m. (ET)**

**Phone**

888.868.FLEX (3539)

**Email**

[service@myameriflex.com](mailto:service@myameriflex.com)

**Chat**

[myameriflex.com](https://myameriflex.com)