

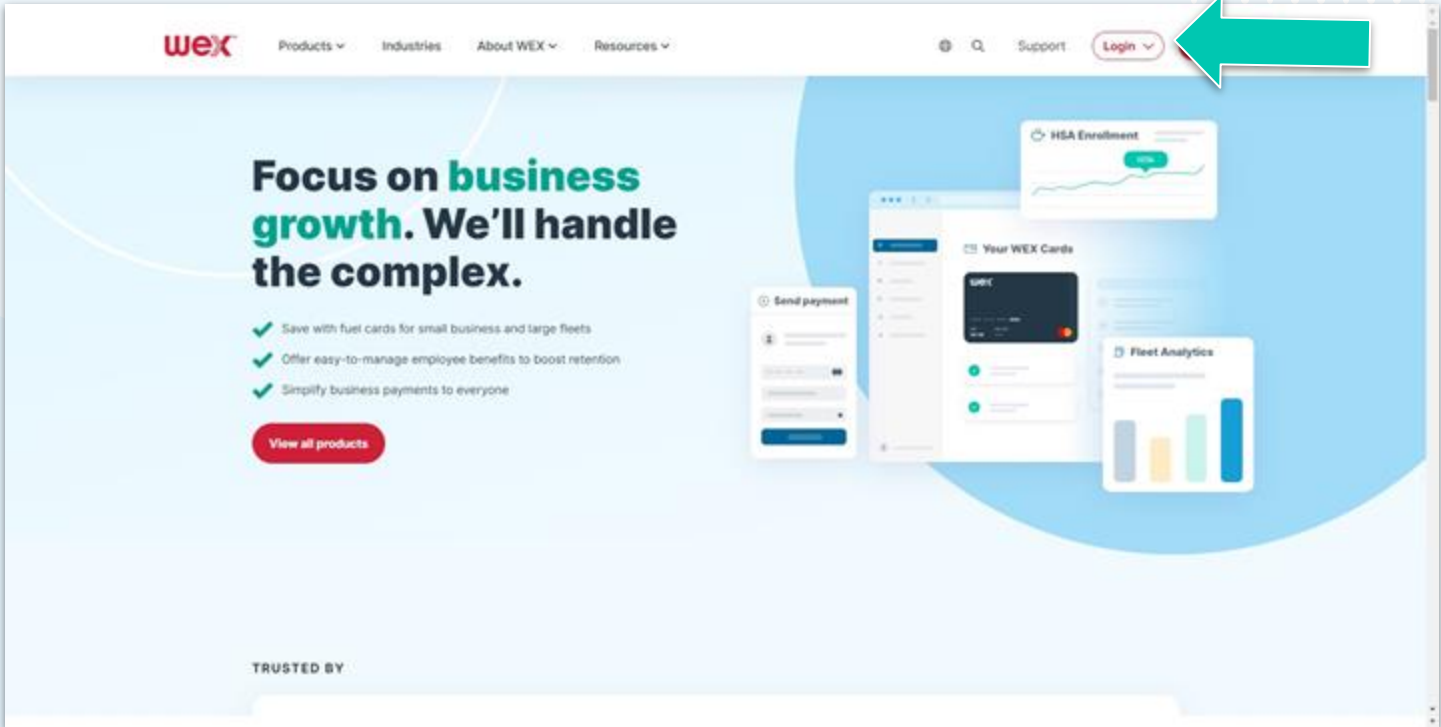


# How to set up your online account

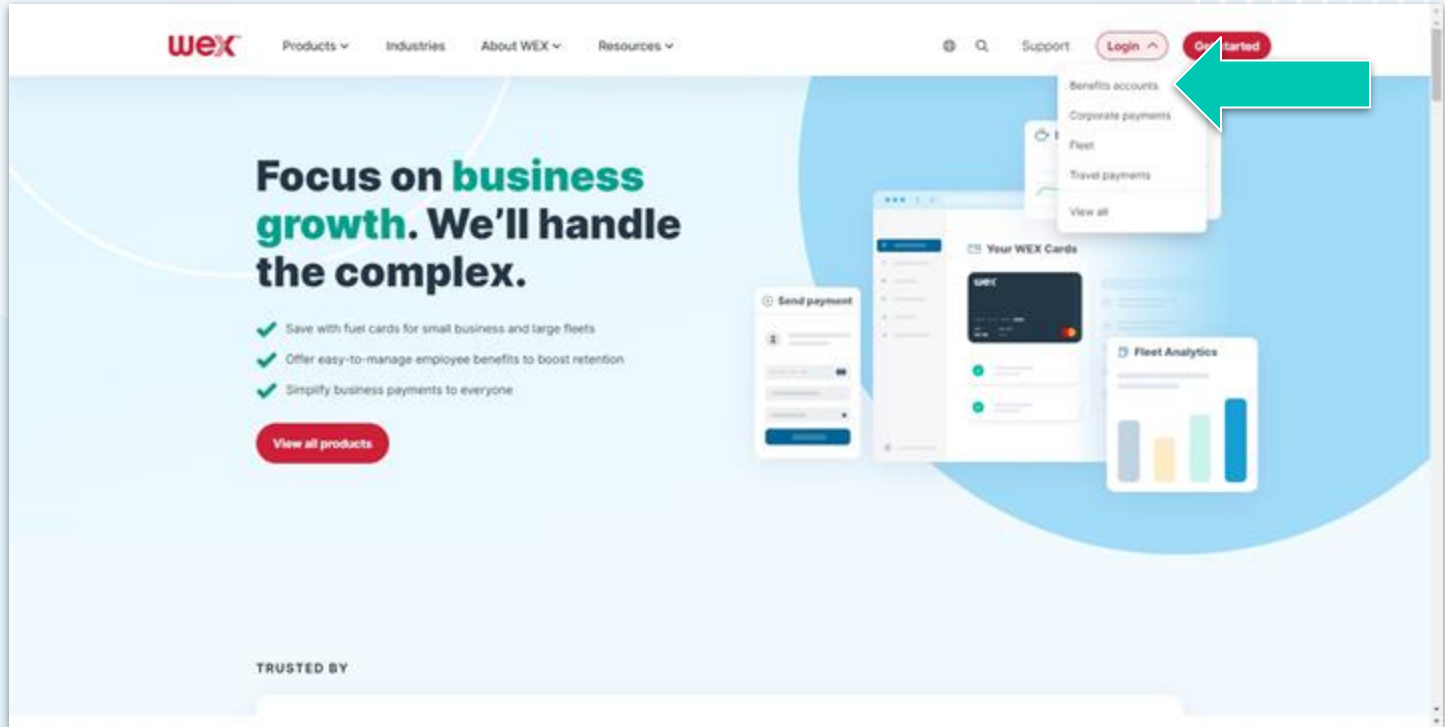
Proprietary & Confidential



# Set up your online account



# Set up your online account



The screenshot displays the WEX website's homepage. At the top, the navigation bar includes the WEX logo, menu items for 'Products', 'Industries', 'About WEX', and 'Resources', a search icon, 'Support', a 'Login' button with a dropdown arrow, and a prominent red 'Get started' button. A red arrow points to the 'Get started' button. Below the navigation, the main content area features the headline 'Focus on business growth. We'll handle the complex.' followed by three bullet points: 'Save with fuel cards for small business and large fleets', 'Offer easy-to-manage employee benefits to boost retention', and 'Simplify business payments to everyone'. A red 'View all products' button is positioned below these points. On the right side, there are several overlapping mockups of the WEX mobile application interface, including screens for 'Send payment', 'Your WEX Cards', and 'Fleet Analytics'. A dropdown menu is open from the 'Login' button, listing options: 'Benefits accounts', 'Corporate payments', 'Fleet', 'Travel payments', and 'View all'.

# Set up your online account

wex Products Industries About WEX Resources

Support Login Get started

WEX Benefits Login

## WEX Benefits Login

Simply select your account type below and you'll be sent to the login page for your Benefits account.

Looking for your Discovery Benefits Login? Discovery Benefits is now a part of WEXinc and you can log into your account using the links below. Welcome to WEX!

### Participants Accounts

- HSA, FSA, HRA/Wellness & Commuter** >  
Plans offered through your employer
- Non-employer individual HSA** >  
Individual plan you enrolled in directly with WEX, not through your employer
- COBRA, Retiree & Leave of Absence** >  
Benefits continuation through your previous employer or during retirement
- Login Assistance** >

# Set up your online account

**wex**  
BENEFITS

## Login

**Existing User**

Username  [Forgot Username?](#)

Remember Me

**Next**

**Trouble accessing your account?**  
Get [online account assistance](#) to reset your username or password, set up a new account, or contact us if you have additional questions.

???


**New User**

New users can create a new account to get started.

**Get Started**

**GlassesUSA**  
Shop thousands of styles with FSA/HSA dollars  
**\$30 OFF**  
on orders over \$120  
**Shop Now**

# Set up your online account



## Verify User

20%  
\*Required

Complete the information below to verify your identity.

First Name\*

Last Name\*

Zip Code\*

Identification Number (select one)

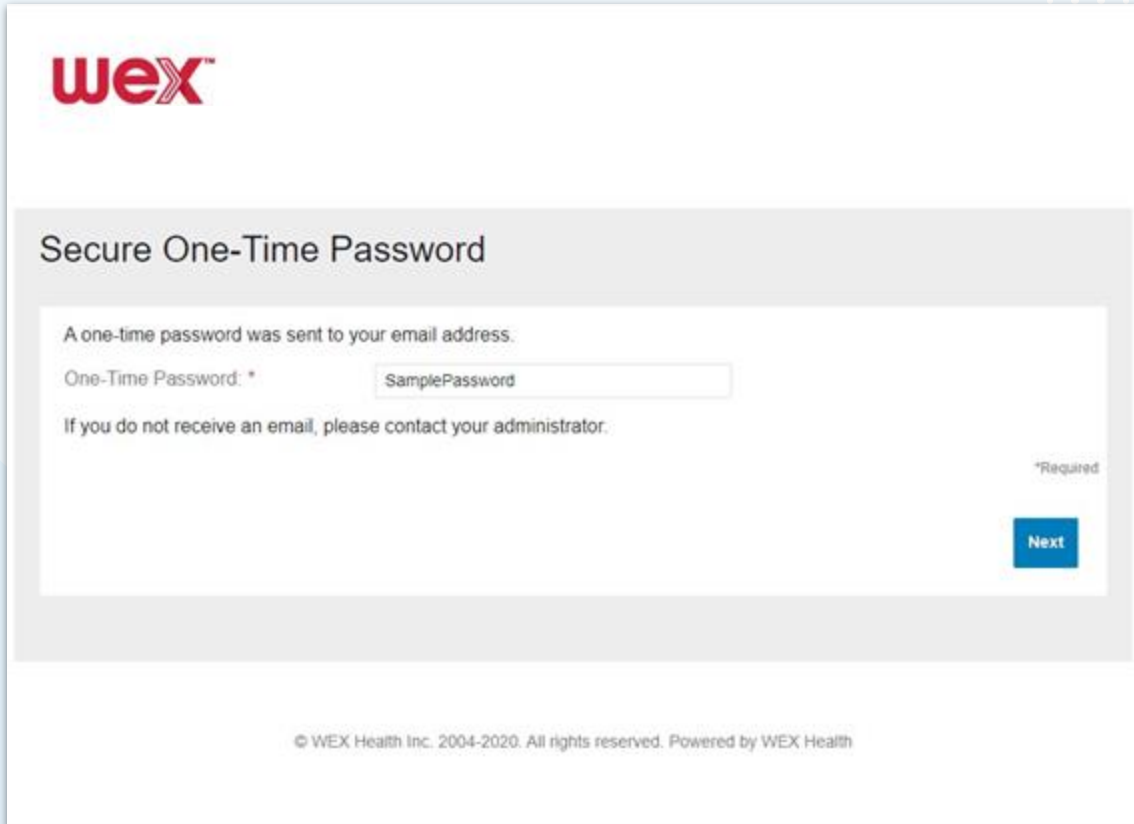
SSN\*  -  -

OR

Employee ID\*

Cancel Next

# Set up your online account



The screenshot shows a web page for WEX. At the top left is the WEX logo. Below it is a grey header with the text "Secure One-Time Password". The main content area is white and contains the following text: "A one-time password was sent to your email address." Below this is a label "One-Time Password: \*" followed by a text input field containing "SamplePassword". Underneath the input field is the text "If you do not receive an email, please contact your administrator." To the right of the input field is a small asterisk with the text "\*Required". At the bottom right of the form is a blue button labeled "Next". At the very bottom of the page is the copyright notice: "© WEX Health Inc. 2004-2020. All rights reserved. Powered by WEX Health".

wex

## Secure One-Time Password

A one-time password was sent to your email address.

One-Time Password: \*


If you do not receive an email, please contact your administrator.

\*Required

Next

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# Set up your online account



## Create Account

**Personal Information** \*Required

Name\*  MI

Birth Date\*

Home Address\*   
  United States    
  Address Line 2

Mailing Address\*   
  Same as Home Address



# Set up your online account

**wex**

## Create Account

**Contact Information** \*Required

Email Address\*

Confirm Email Address\*

Alternate Email Address

Confirm Alternate Email Address

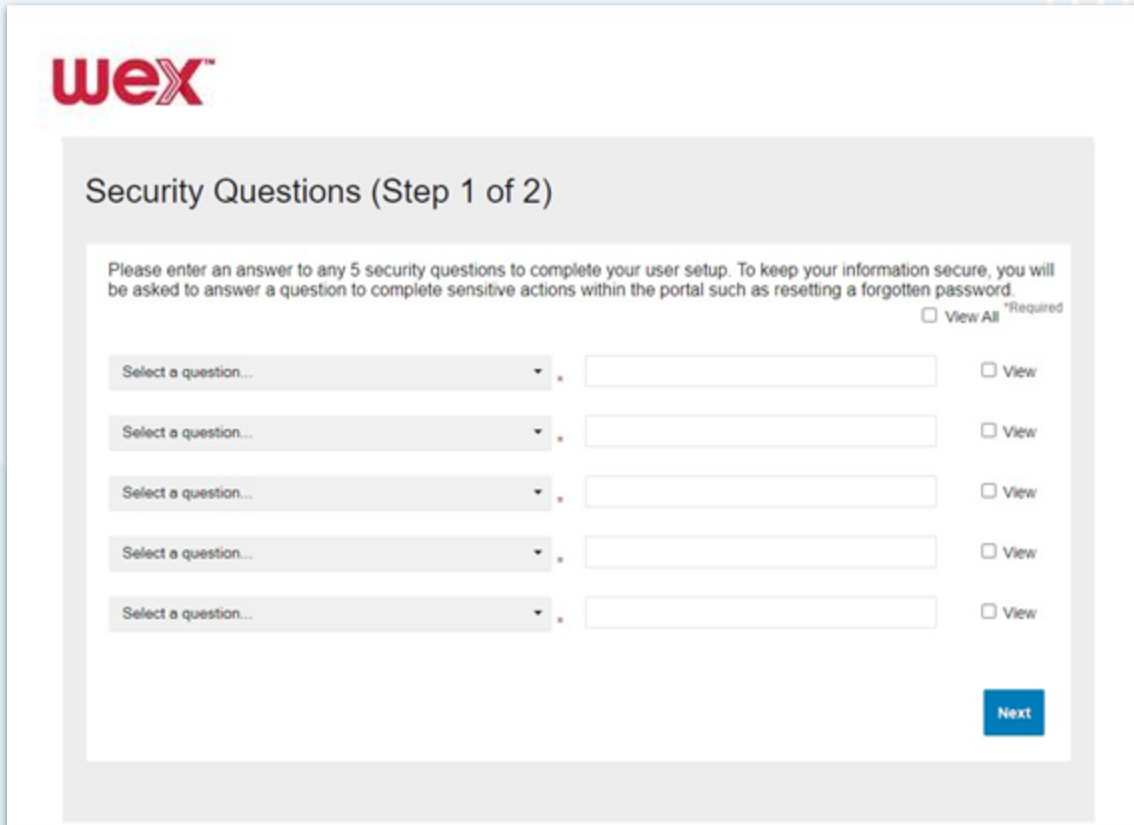
Mobile Number (  )  -

Mobile Carrier

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 ⓘ

# Set up your online account



The screenshot shows the WEX logo in the top left corner. Below it is the heading "Security Questions (Step 1 of 2)". A paragraph of instructions reads: "Please enter an answer to any 5 security questions to complete your user setup. To keep your information secure, you will be asked to answer a question to complete sensitive actions within the portal such as resetting a forgotten password." To the right of this text is a checkbox labeled "View All" with a superscripted "Required" next to it. Below the instructions are five rows, each consisting of a dropdown menu with the text "Select a question...", a text input field, and a "View" checkbox. At the bottom right of the form area is a blue "Next" button.

# Set up your online account



## Change Username and Password (Step 2 of 2)

\*Required

Please change your login information.

Username\*

Your username may contain alphanumeric characters and any of the following special characters: period (.), at sign (@), underscore (\_), and dash (-).

New Password\*

Your password must contain at least ten characters, one upper case letter, one number and one special character. Special characters supported are ! @ # \$ % & \* ? . The letters in your password are case sensitive. Your password cannot be a previous password.

Confirm Password\*

Submit

# Set up your online account

**Go mobile!**

Add a phone number to your account to receive text alerts, and get our app for easy benefits access.

Mobile Number: ( 555 ) 555 - 5555

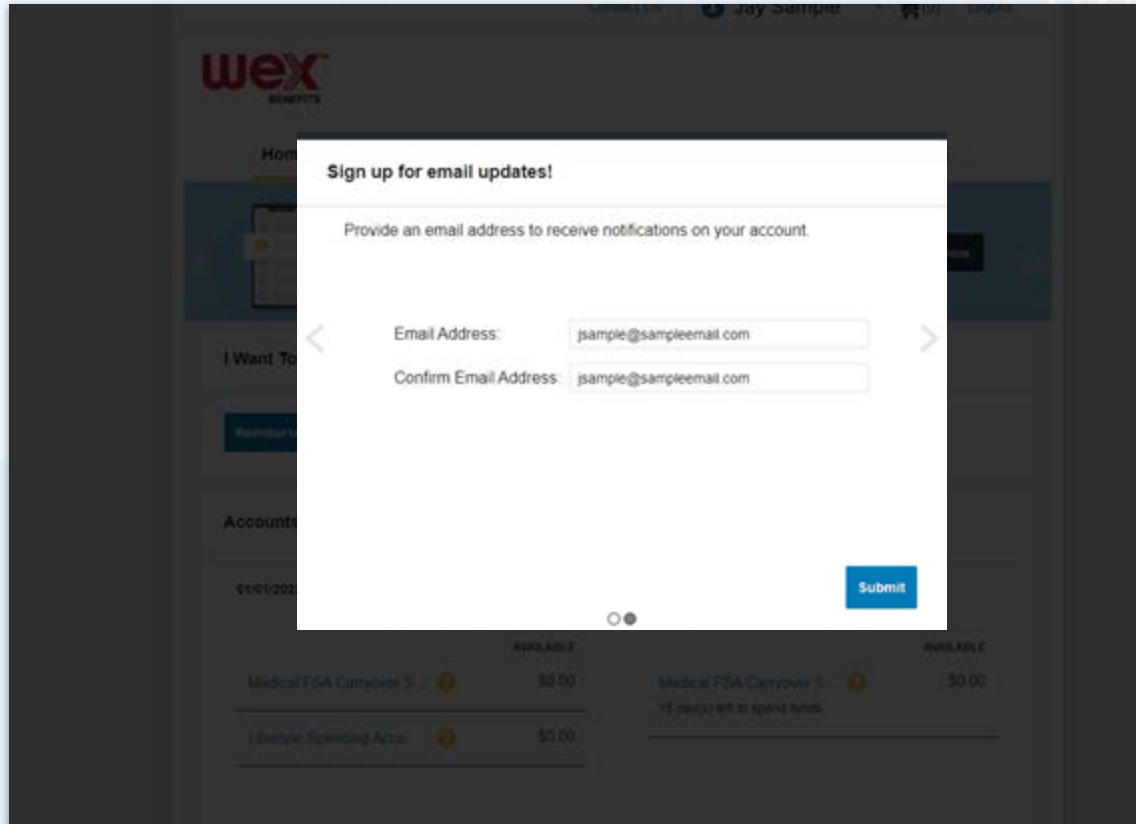
Mobile Carrier: Your Carrier

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: Select a Time Zone

Submit

# Set up your online account



**Sign up for email updates!**

Provide an email address to receive notifications on your account.

Email Address:

Confirm Email Address:

Medical FSA Carryover 5.00 \$0.00 AVAILABLE  
Lifestyle Spending Acct 5.00 \$0.00 AVAILABLE

# How to reset your password in your online account

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# Password Reset

## Login


**Existing User**

Username  [Forgot Username?](#)

Remember Me

**Next**

**Trouble accessing your account?**  
Get [online account assistance](#) to reset your username or password, set up a new account, or contact us if you have additional questions.



# Password Reset

## Login


**Existing User**

Username [Change Account?](#)

Password  [Forgot Password?](#)

[Login](#)

**Trouble accessing your account?**  
Get [online account assistance](#) to reset your username or password, set up a new account, or contact us if you have additional questions.




A teal arrow points from the 'Forgot Password?' link to the 'Trouble accessing your account?' section.



# Password Reset

## Request Password Reset

 20%

Enter your username, last name and last 4 digits of your SSN. \*Required

Username \*

Last Name \*

Last 4 Digits of Your SSN \*

[Next](#)

# Password Reset

## Verify Your Identity




40%

Your protection is important to us. We need to take some extra steps to verify your identity. Please confirm how you would like to proceed:

- Text Message** (\*\*) \*\*\*-0000  
Text messaging rates may apply.  
View our [privacy policy](#) and [terms of service](#).  
1 message per attempt.
- Email** sS\*\*\*@\*\*\*.com
- Alternate Email** sS\*\*\*@\*\*\*.com

# Password Reset

## Verify Your Identity

 50%

A passcode was sent to your mobile number: (\*\*\* ) \*\*\*-0000 \*Required

Verification passcode: \*   View

If you did not receive the text message, or your passcode has expired, click on the link below to resend the passcode or contact your administrator.

[Resend passcode](#)

# Password Reset

## Verify Your Identity

60%

Your protection is important to us. We need to take some extra steps to verify your identity. Please confirm how you would like to proceed:

- Security Questions**
- Last 6 digits of primary account holder's benefits debit card

Next

# Password Reset

## Update Password

80%

**Enter your new password** \*Required

New Password\*


Your password must contain at least eight characters, one upper case letter, one number and one special character. Special characters supported are ! @ # \$ % & \* ?. The letters in your password are case sensitive. Your password cannot be a previous password.

Confirm Password\*

**Next**

# Password Reset

## Password Reset Results



100%

Your password has been changed.

Login

The image shows a user interface for password reset results. It features a title 'Password Reset Results', a green progress bar at 100%, a confirmation message 'Your password has been changed.', and a blue 'Login' button.

# Password Reset

## Login


**Existing User**

Username  [Forgot Username?](#)

Remember Me

**Next**

**Trouble accessing your account?**  
Get [online account assistance](#) to reset your username or password, set up a new account, or contact us if you have additional questions.





# Navigate your online account



Proprietary & Confidential





# Navigate your online account

Contact Us | Hakeem Langley

**wex**  
BENEFITS

Home Accounts Videos & Forms Message Center 14

**Shop for HSA + FSA eligible items in one place**  
Save \$ on personal care items, OTC medications, first aid, face masks, and more!

Start shopping

I Want To:

Get Help Reimburse Myself Send Payment Contribute to HSA View Investments

Manage My Expenses

## Select your name

along the bar at the top of the screen to open your profile menu

# Profile Menu

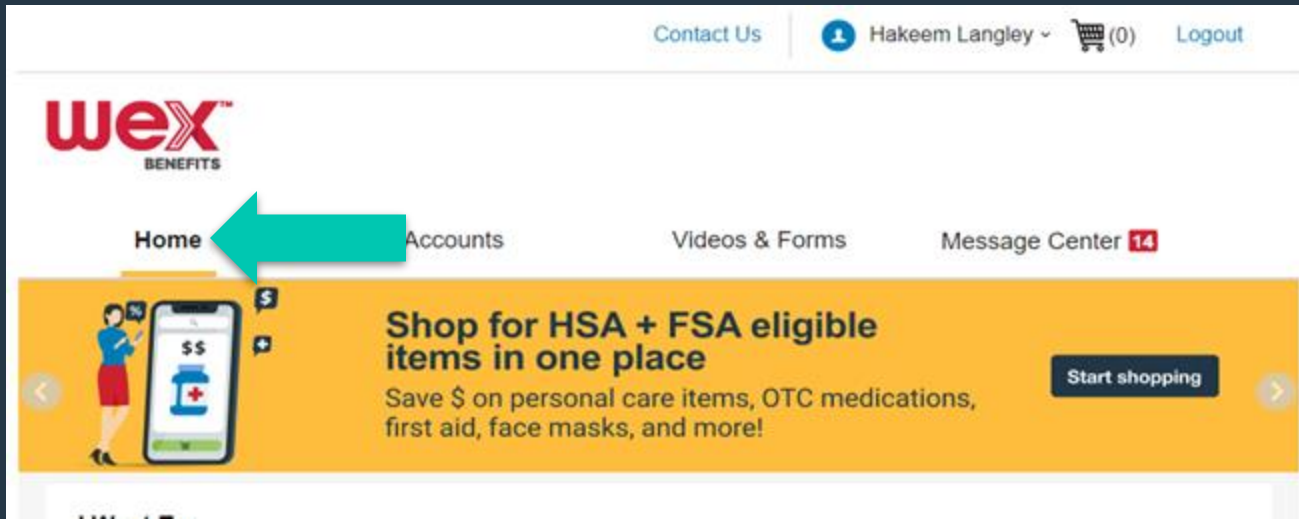
- **Review** personal information
- **Add** dependents, authorized representatives, and direct deposit information
- **Order** additional or replacement WEX benefits debit cards
- **Update** login information

The screenshot shows the WEX Benefits website interface. At the top right, there is a navigation bar with "Contact Us", a user profile icon for "Hakeem Langley", a shopping cart icon with "(0)", and a "Logout" link. Below this, the main content area features the WEX BENEFITS logo on the left. In the center, there are navigation tabs for "Home" and "Accounts". A large yellow banner at the bottom of the main content area contains an illustration of a woman with a smartphone and a shopping cart icon, with the text "Shop for items in o" and "Save \$ on pers first aid, face n". On the right side, there is a "Center 14" notification and a "Start shopping" button. A white profile menu is open, displaying the following information: "Consumer Communication ID | 997587712", "Username | HLangley", "Email Address | HLangley@email.com", and "Last Login | 12/19/2022 - Online". Below this, the menu is titled "PROFILE" and lists four options: "Profile Summary", "Banking", "Payment Method", and "Login Information".

# Home Page

This page shows highlights of all your recent activity. These include...

- **I want to** shows possible actions
- **Accounts** shows plans and balances
- **Tasks** shows tasks that may need to be completed
- **Recent transactions** shows recent account activity



The screenshot shows the WEX Benefits Home Page. At the top right, there are links for "Contact Us", a user profile for "Hakeem Langley" with a dropdown arrow, a shopping cart icon with "(0)", and a "Logout" link. The WEX BENEFITS logo is on the left. Below the logo is a navigation bar with "Home", "Accounts", "Videos & Forms", and "Message Center 14". A large teal arrow points to the "Home" link. Below the navigation bar is a yellow promotional banner for shopping HSA + FSA eligible items. The banner features an illustration of a woman with a smartphone showing a pharmacy app, and text that says "Shop for HSA + FSA eligible items in one place" and "Save \$ on personal care items, OTC medications, first aid, face masks, and more!". A "Start shopping" button is on the right. The bottom of the page shows the start of a "WELLNESS" section.

# Home Page

wex™  
BENEFITS

Home Accounts Videos & Forms Message Center 14

Shop for HSA + FSA eligible items in one place

Save \$ on personal care items, OTC medications, first aid, face masks, and more!

Start shopping

I Want To:

Get Help Reimburse Myself Send Payment Contribute to HSA View Investments

Manage My Expenses

The “I Want To” section allows you to:

**File** a claim.

**Manage** expenses and investments.

**Find** answers to questions

# Home Page

The screenshot displays the WEX Home Page interface. At the top, under the heading "I Want To:", there are five blue buttons: "Get Help", "Reimburse Myself", "Send Payment", "Contribute to HSA", and "View Investments". Below these is a larger blue button labeled "Manage My Expenses".

The main content area is divided into two columns. The left column features a "Tasks" section with a red notification icon containing the number "1". A large red arrow points to this section. Below the "Tasks" header, there is a text prompt: "To get your money faster, set up a bank account for direct deposit".

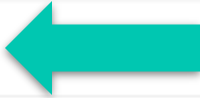
The right column features a "Healthcare Savings Goal" section. It includes a semi-circular progress gauge that is 23% filled with orange. Below the gauge, the text reads "\$4,580 of \$20,000" and "EDIT GOAL".

The “Tasks” section allows you to:

- **Review** actions needed.

# Home Page

## Accounts



### HEALTH SAVINGS ACCOUNT

1/1/2022 - 12/31/2022

	AVAILABLE		AVAILABLE
Cash Account	\$1,050.00	Limited Purpose Flexible... ?	\$2,750.00
Investment Account	\$3,530.21	Health Reimbursement A... ?	\$2,000.00
		Dependent Care Flexible... ?	\$4,900.00
		Transit ?	\$3,240.00
		Parking ?	\$3,240.00

The “Accounts” section allows you to:

- **View** available balances.

# Home Page

Transit  \$3,240.00

Parking  \$3,240.00

## Flu season is just around the corner

Prepare by checking your account balance and stocking up on eligible items if needed.

[Shop for items](#)



## Do you have multiple HSAs?

You have options.

[Read our blog to learn more >>](#)



## Recent Transactions



DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
12/1/2022	Dependent Care	Lillian Langley	DAYCARE	\$100.00	\$

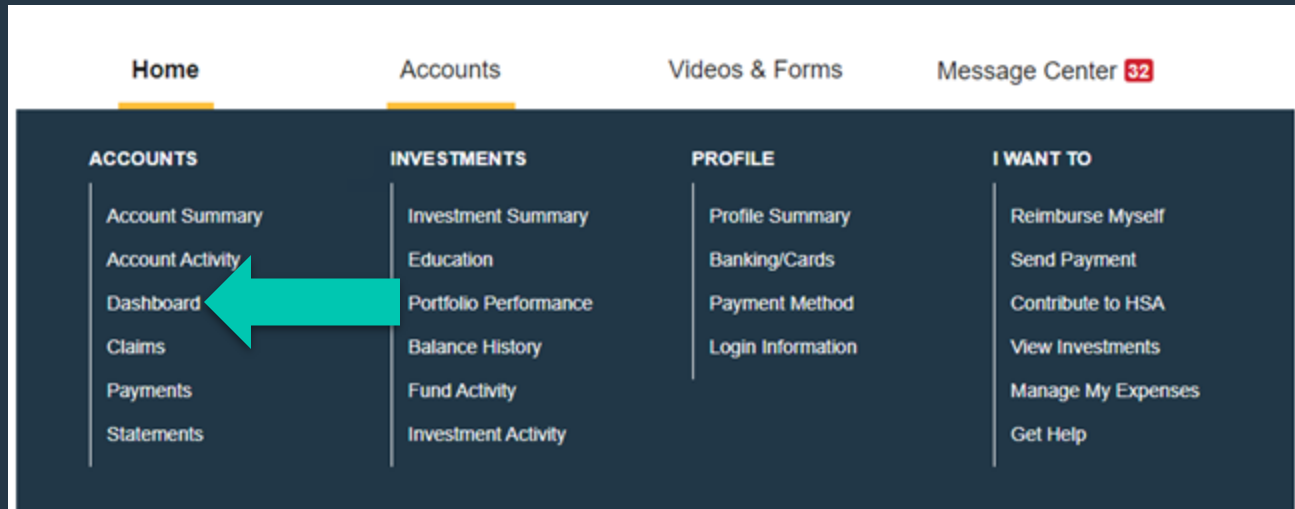
The “Recent Transactions” section allows you to:

- **Check** transaction history.

# Accounts Page

This page shows highlights of all your recent activity. These include...

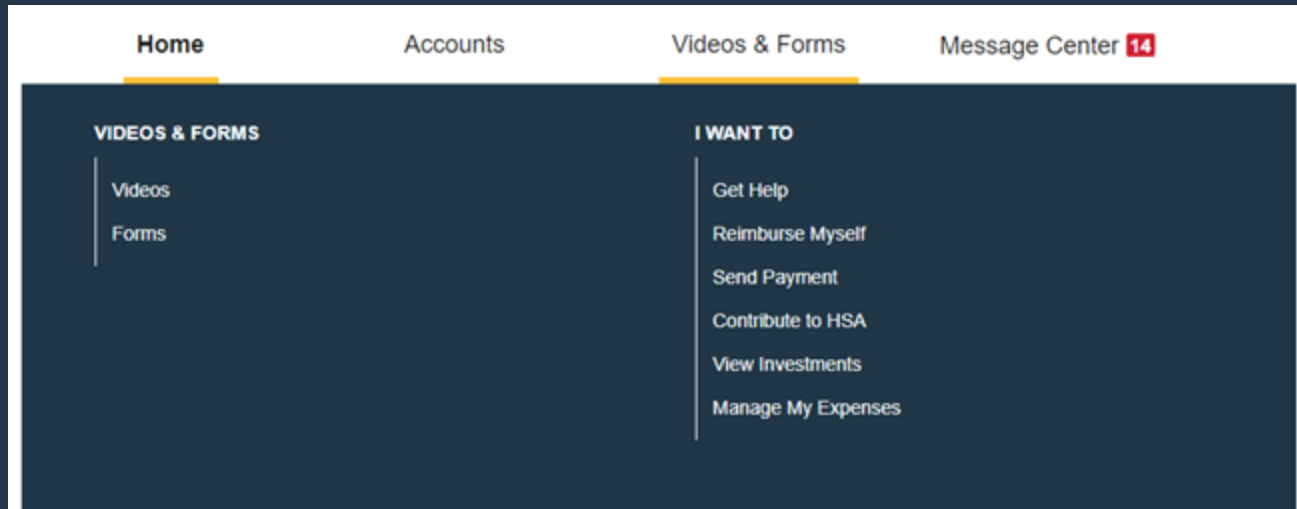
- **Account Summary**
- **Payments** history
- **Claims** details
- **Dashboard**





# Videos & Forms Page

- **View** videos, forms and links applicable to your account(s)



# Message Center Page

- **Locate** account statements, receipt reminders, advices of deposit and HSA tax documents, if applicable.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Accounts', 'Videos & Forms', and 'Message Center 14'. The 'Message Center' tab is highlighted with a yellow underline. Below the navigation bar, the page title 'Message Center' is displayed. To the right of the title are two links: 'Update Notification Preferences' and 'View Statements'. Below this is a section titled 'Current Messages' with an 'Archive' button on the right. A table of messages is shown below, with columns for 'DATE/TIME', 'FROM', and 'SUBJECT'. The first message is dated '10/1/2022 8:16 AM', from 'Auto-generated', and has the subject 'HSA Account Summary (9/1/2022 - 9/30/2022)'. A 'View' button is located to the right of the message row.

Home Accounts Videos & Forms **Message Center 14**

## Message Center

[Update Notification Preferences](#) [View Statements](#)

**Current Messages** [Archive](#)

<input type="checkbox"/>	DATE/TIME ▾	FROM	SUBJECT	
<input type="checkbox"/>	10/1/2022 8:16 AM	Auto-generated	HSA Account Summary (9/1/2022 - 9/30/2022)	<a href="#">View</a>

# Message Center Page

- **Locate** account statements, receipt reminders, advices of deposit and HSA tax documents, if applicable.
- **Update** notification preferences to opt in or out of certain text and email alerts.

The screenshot shows the Message Center page with a navigation bar at the top containing 'Home', 'Accounts', 'Videos & Forms', and 'Message Center 14'. The 'Message Center' tab is highlighted with a yellow underline. Below the navigation bar, the page title 'Message Center' is displayed. To the right of the title, there is a link 'Update Notification Preferences' with a teal arrow pointing to it. Below this link is a section titled 'Current Messages' with an 'Archive' button. At the bottom, there is a table with columns for 'DATE/TIME', 'FROM', and 'SUBJECT'. The table contains one row with the following data: '10/1/2022 8:16 AM', 'Auto-generated', and 'HSA Account Summary (9/1/2022 - 9/30/2022)'. A 'View' button is located to the right of the table row.

Home Accounts Videos & Forms **Message Center 14**

## Message Center

[Update Notification Preferences](#)

**Current Messages** [Archive](#)

DATE/TIME	FROM	SUBJECT
10/1/2022 8:16 AM	Auto-generated	HSA Account Summary (9/1/2022 - 9/30/2022)

[View](#)



# How to set up your benefits mobile app

Proprietary & Confidential





How to set up your WEX benefits mobile app

1

Download the app from your phone's online store



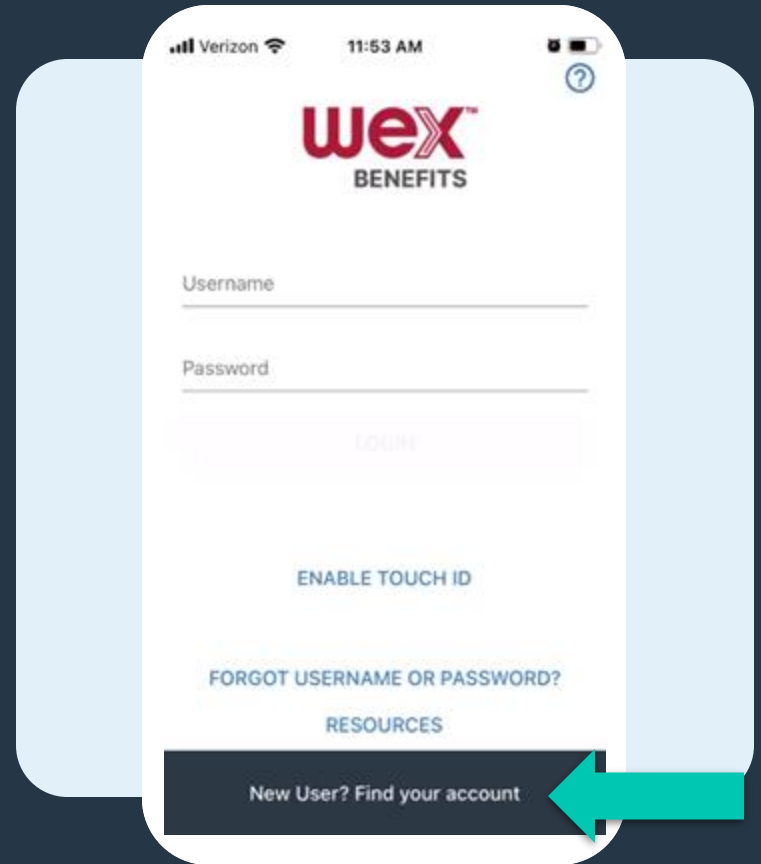


How to set up your WEX benefits mobile app

2

Select “New User? Find your account”

- Must have an email address on file





3

### Complete required fields

- Select “Next”

**Complete the information below to verify your identity.** \*Required

First Name\*  
Jenny

Last Name\*  
Sample

Zip Code\*  
00000

**Identification Number (select one)**

SSN\*  
000 - 00 - 0000

OR

Employee ID\*

Cancel Next



4

Enter the temporary password in the required field

- Select “Next”

Verify User

Secure One-Time Password

A one-time password was sent to your email address.

One-Time Password: \*

If you do not receive an email, please contact your administrator.

\*Required

Next

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5

## Set up security questions in the required fields

- Select “Next”

### Security Questions

Please enter an answer to any 5 security questions to complete your user setup. To keep your information secure, you will be asked to answer a question to complete sensitive actions within the portal such as resetting a forgotten password.

\*Required

View All

Select a question \*

\*\*\*\*\*

View

What is the first name of your first grade teacher? \*

\*\*\*\*\*

View

What is the last name of your first boyfriend or girlfriend? \*

\*\*\*\*\*

View

What is the name of the band you liked most during college? \*

\*\*\*\*\*

View

What is the name of the college you went to? \*

\*\*\*\*\*

View

[Next](#)



6

Enter desired username and password in the required fields

- Select “Next”

Create Username and Password

\*Required

Username\*

ASample202

Your username may contain alphanumeric characters and any of the following special characters: period (.), at sign (@), underscore (\_), and dash (-).

Password\*

.....

Your password must contain at least ten characters, one upper case letter, one number and one special character. Special characters supported are ! @ # \$ % & \* ?. The letters in your password are case sensitive. Your password cannot be a previous password.

Confirm Password\*

.....

Next

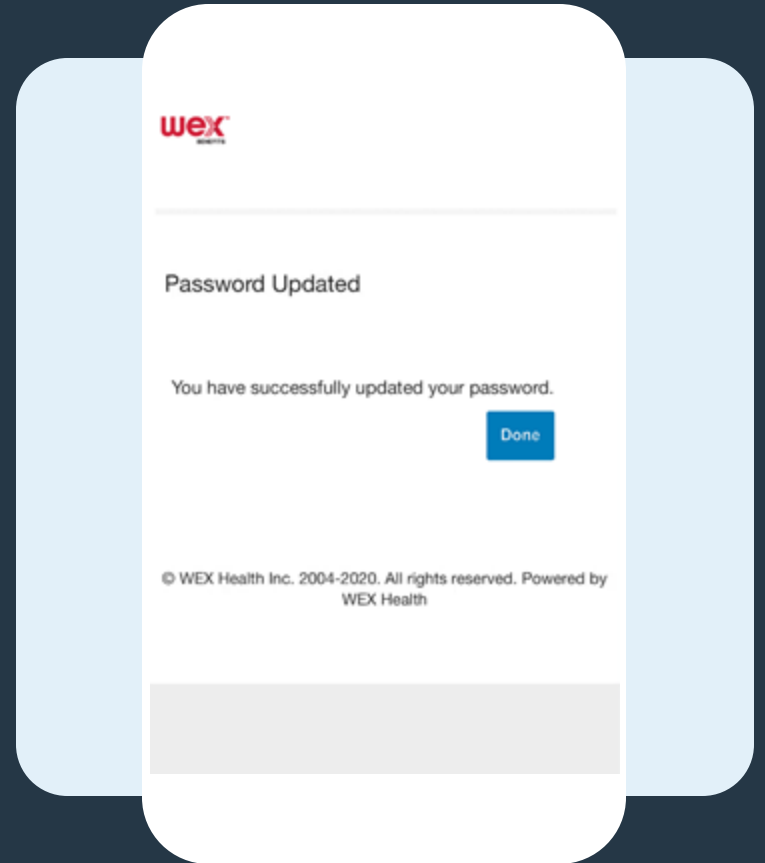


How to set up your WEX benefits mobile app

7

You'll receive a confirmation message

- Select "Done"





# How to reset your username and password in the mobile app

Proprietary & Confidential





How to reset your username in the WEX Benefits mobile app

1

Select “Forgot Username or Password?”

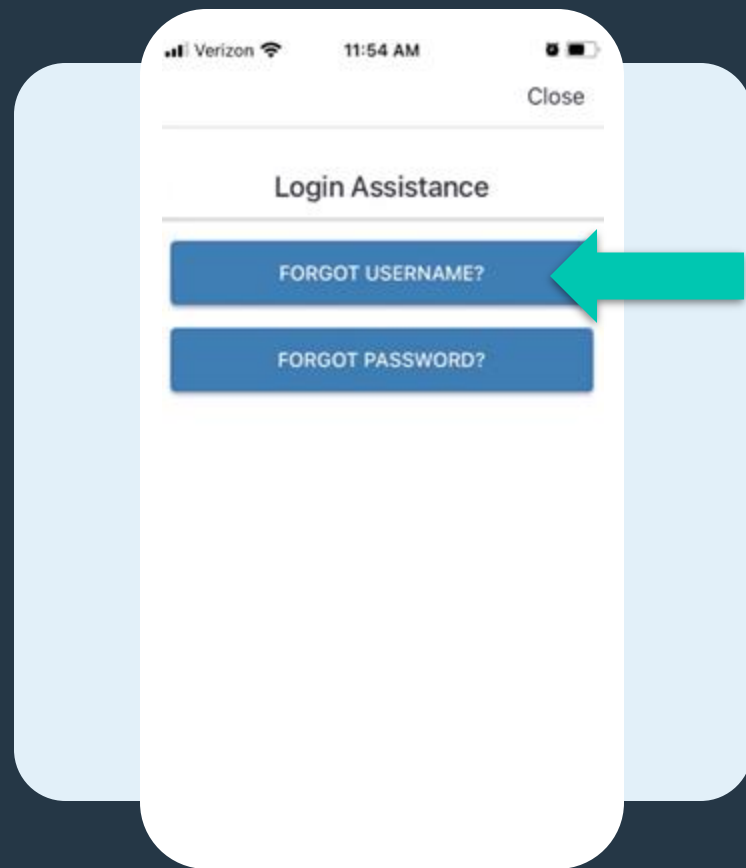




How to reset your username in the WEX Benefits mobile app

2

Select “Forgot Username?”





3

Provide email address and full name

- Select “Next”

AA benefitslogin.wexhealth.com

## Forgot Username

### Forgot your Username?

If you do not have an email address on record for your account please contact your administrator for assistance. If you have an email address on record, enter the information below. We will send your username to the email address on record.

Enter your account email address\*

**Enter the name on the account**

First Name\*

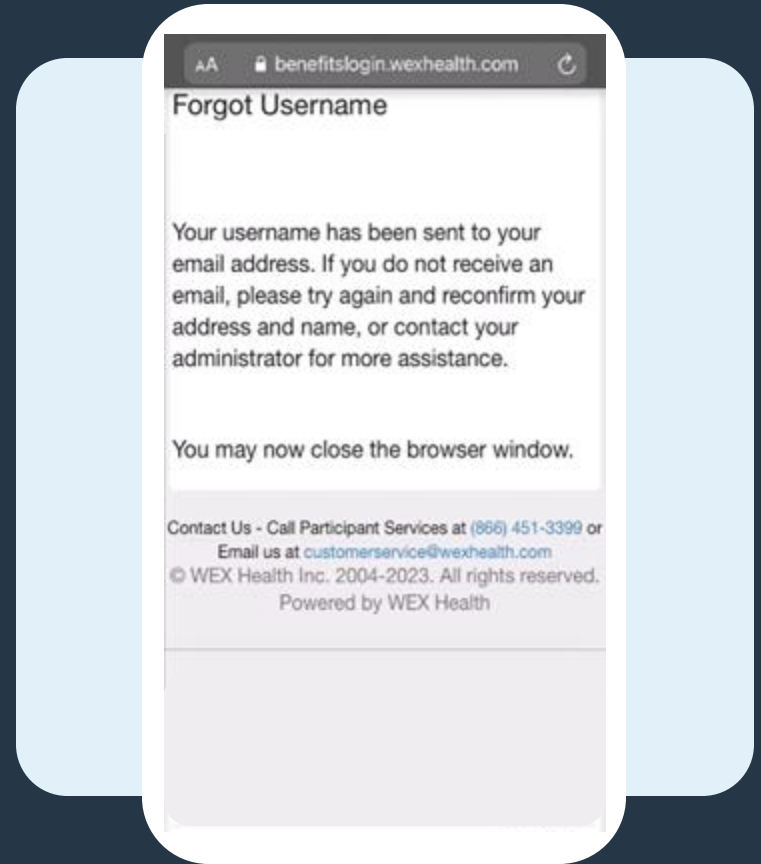
Last Name\*

Next



4

Retrieve your username from the email and reopen the app



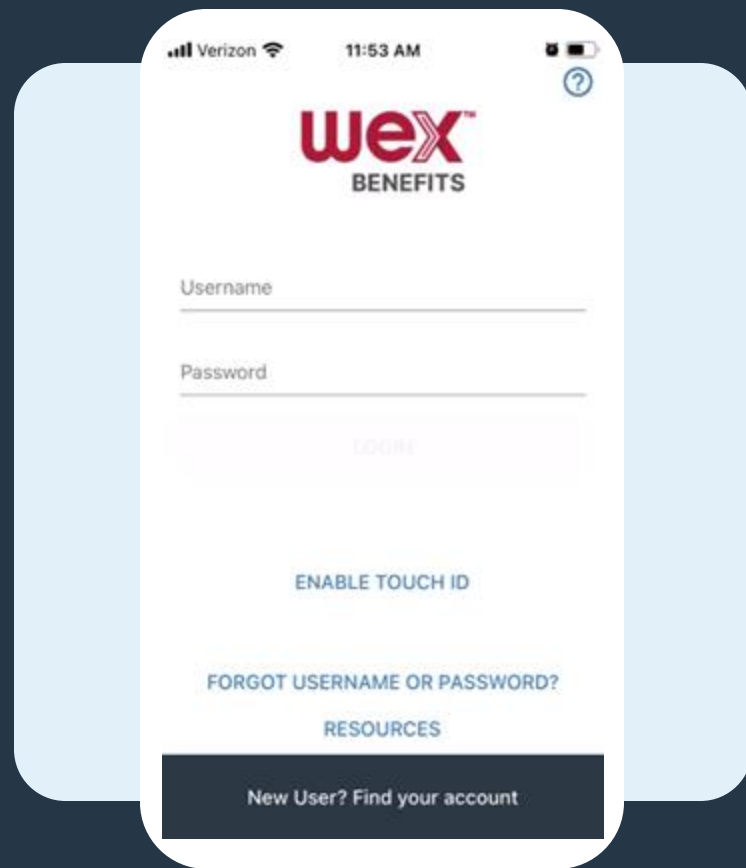




How to reset your username in the WEX Benefits mobile app

5

Use the username retrieved from your email to log in





How to reset your username in the WEX Benefits mobile app

6

Select “Forgot Username or Password?”

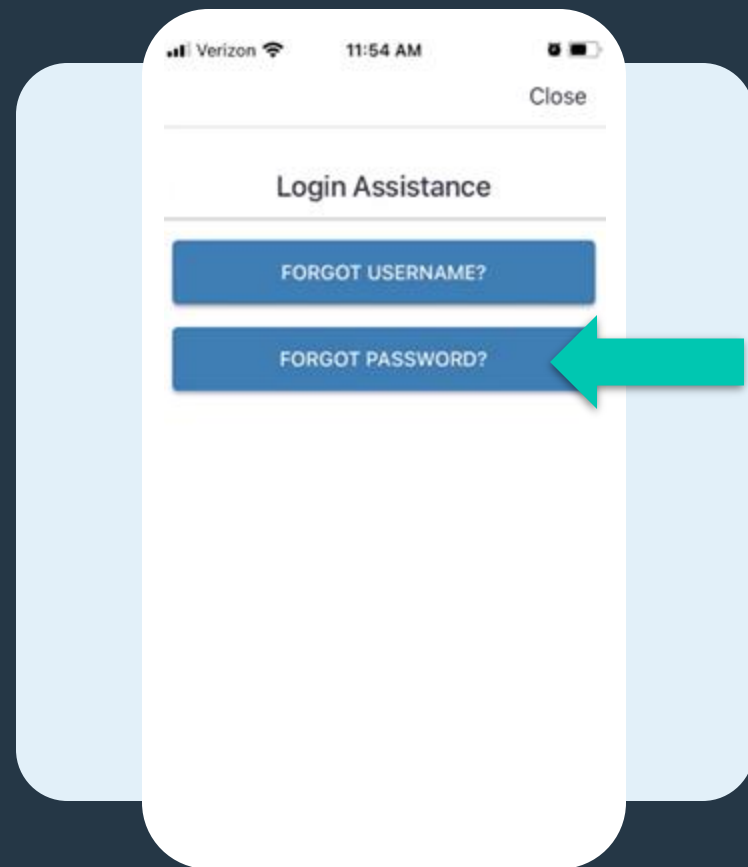




How to reset your username in the WEX Benefits mobile app

7

Select “Forgot Password?”





8

## Provide username and email address

- Select “Next”

AA benefitslogin.wexhealth.com

wex

### Request Password Reset

Enter your username and email address.  
If the provided username and email address are on file you will receive an email with instructions.

Username\*

Enter your account email address\*

\*Required

Next

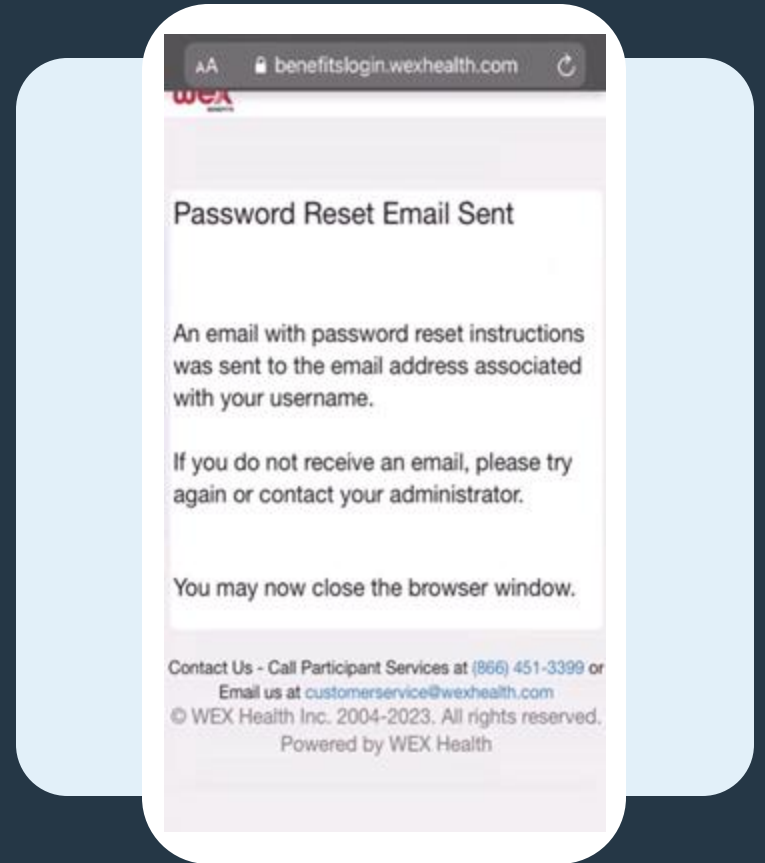
Desktop version



How to reset your username in the WEX Benefits mobile app

9

Check your email and select the password reset link

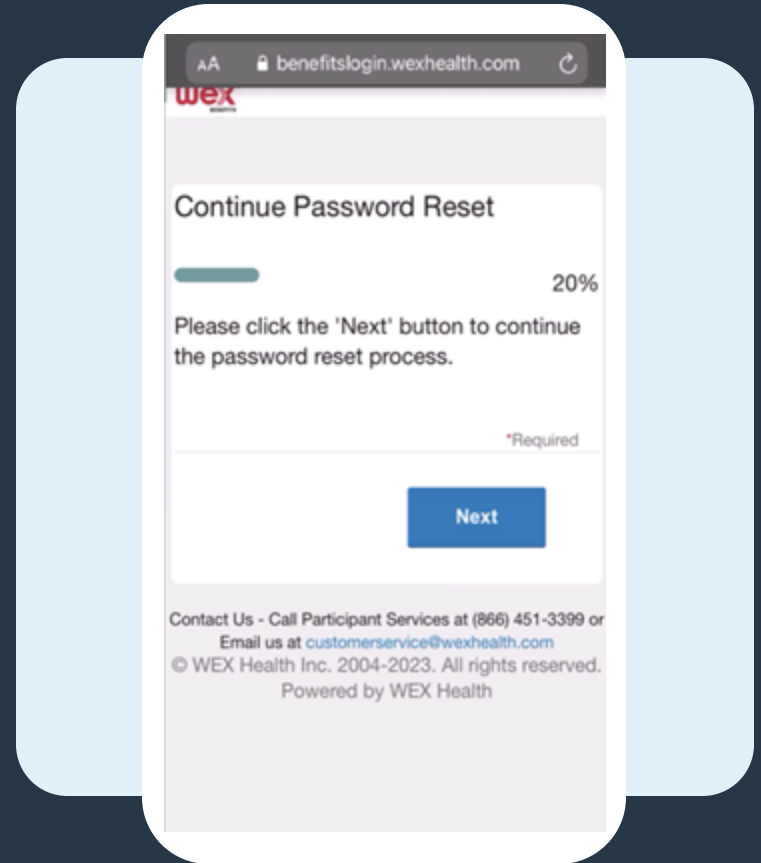




10

Follow the link to continue the reset

- Select “Next”

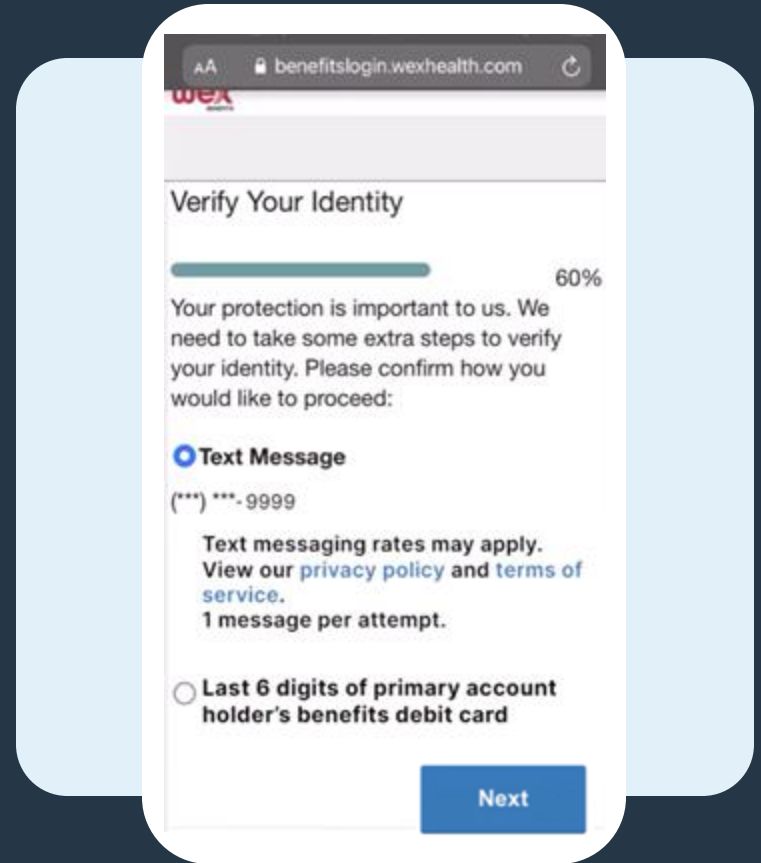




11

Verify your identity by text message or last

- Select “Next”

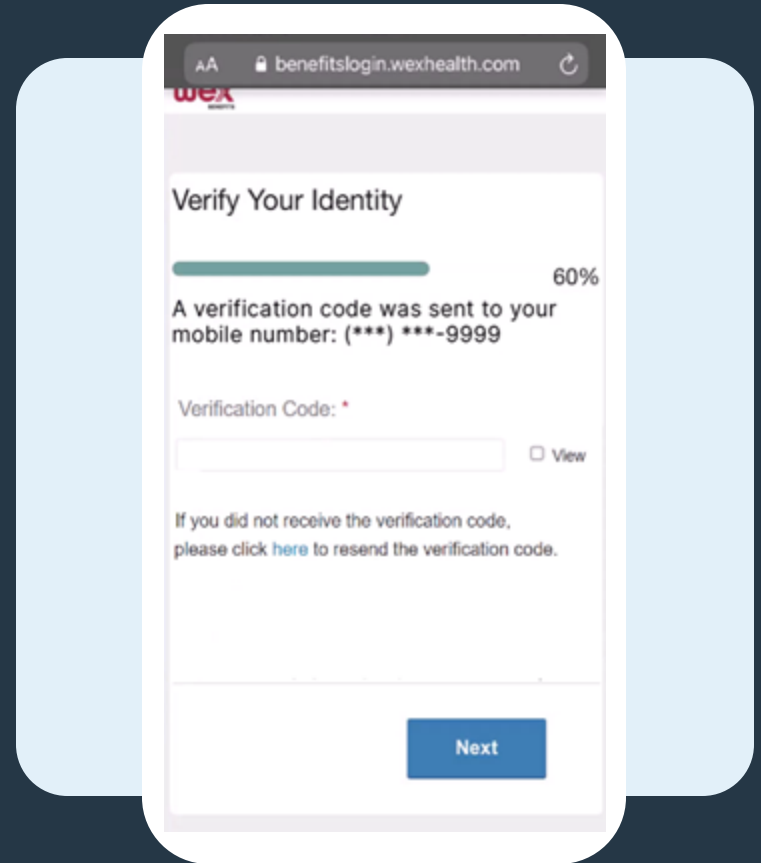




12

## Enter the appropriate information

- Select “Next”



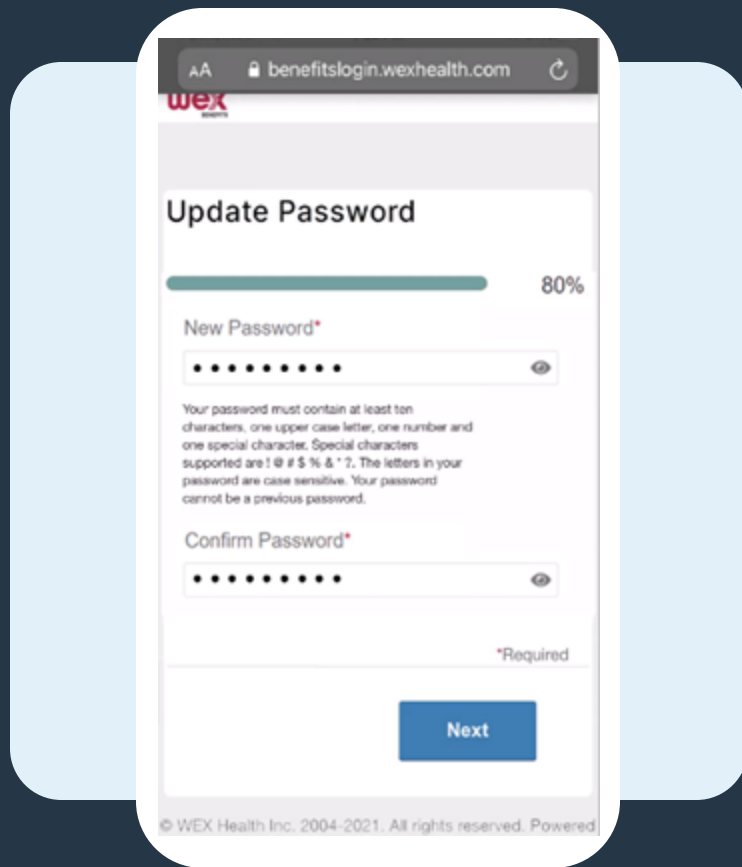




13

## Enter and confirm your new password

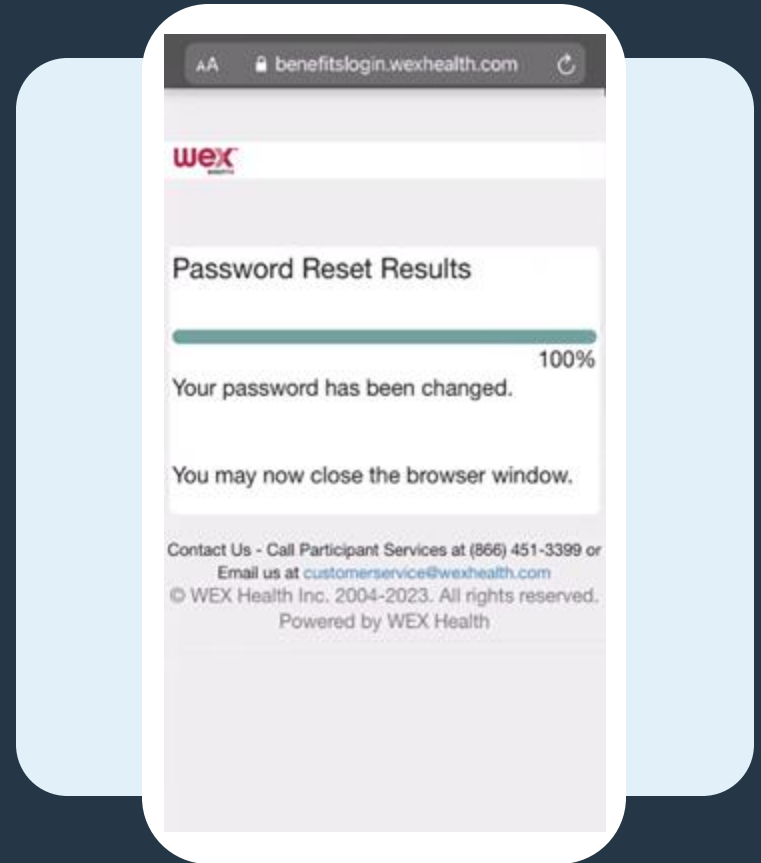
- Select “Next”





14

You'll receive confirmation the password is updated

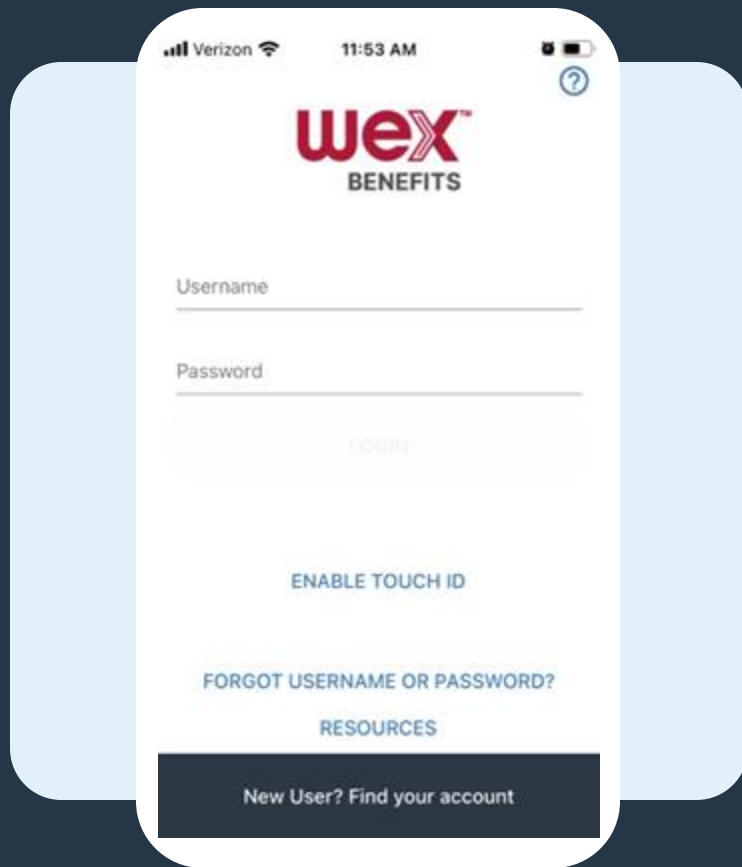


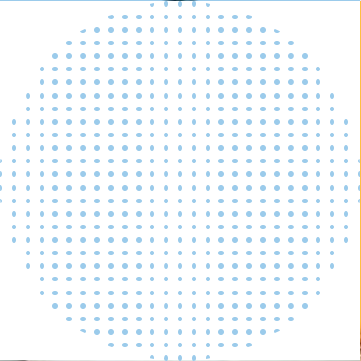


How to reset your username in the WEX Benefits mobile app

15

Log in using your new password





# How to Access WEX Knowledgebase

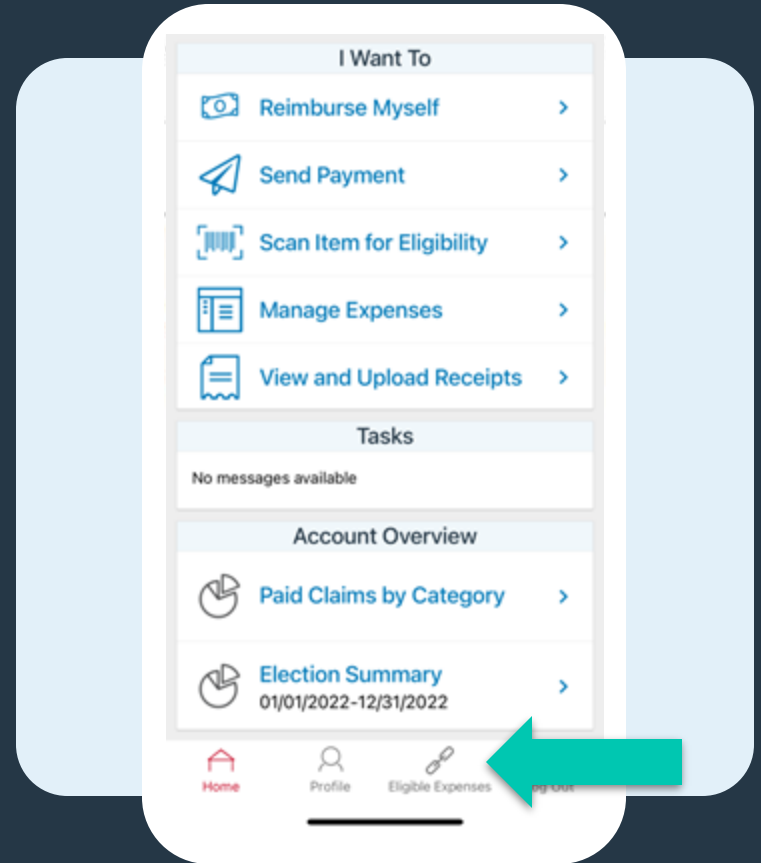
from your mobile or online account



How to access the Knowledgebase in WEX benefits mobile app

1

Select “Eligible Expenses”

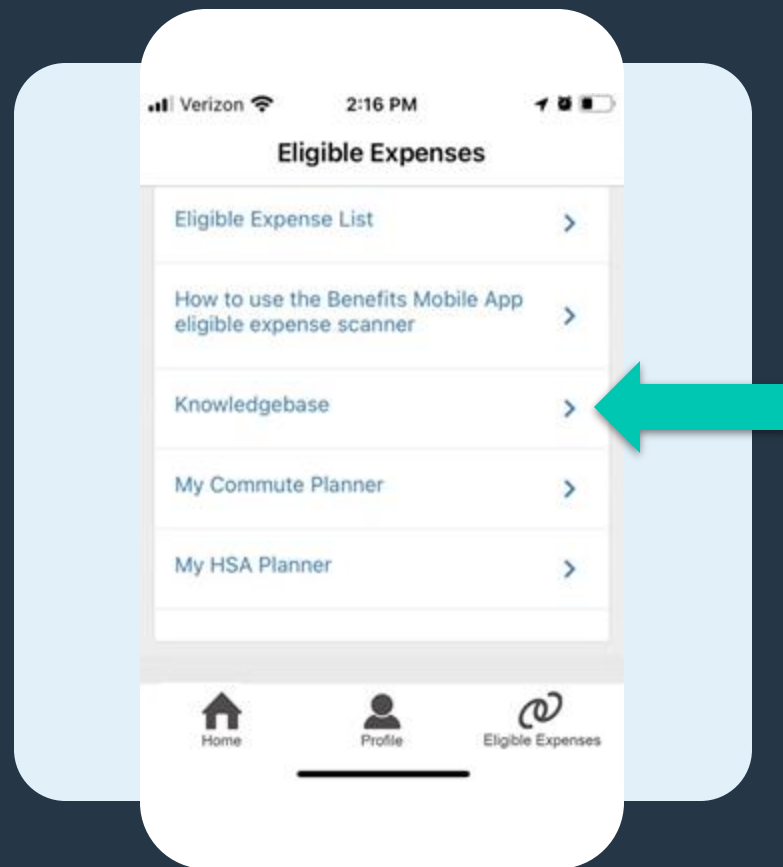




How to access the Knowledgebase in WEX benefits mobile app

2

Select “Knowledgebase”

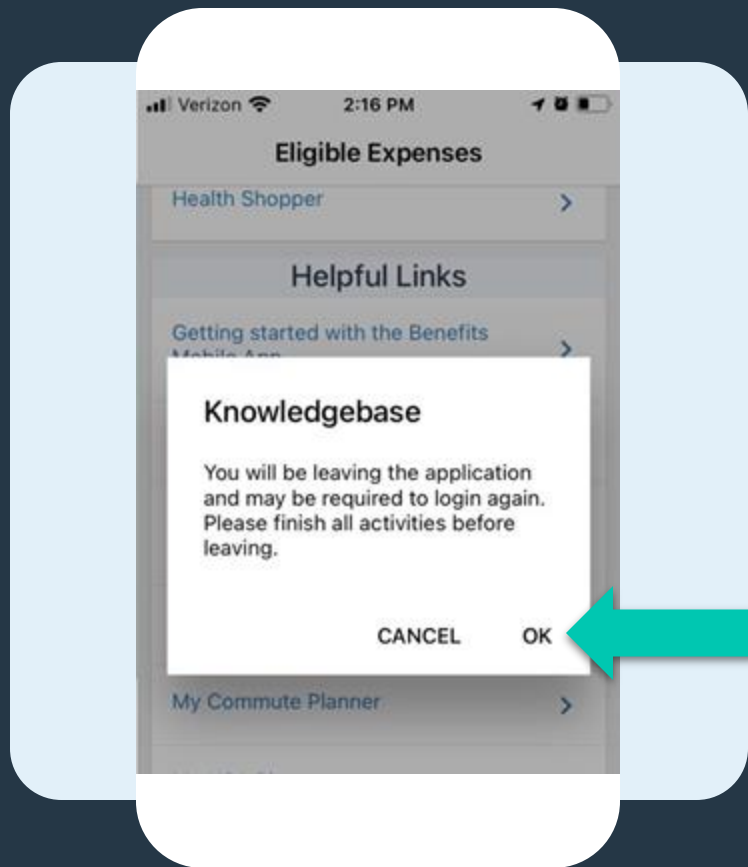




How to access the Knowledgebase in WEX benefits mobile app

3

Select "OK"

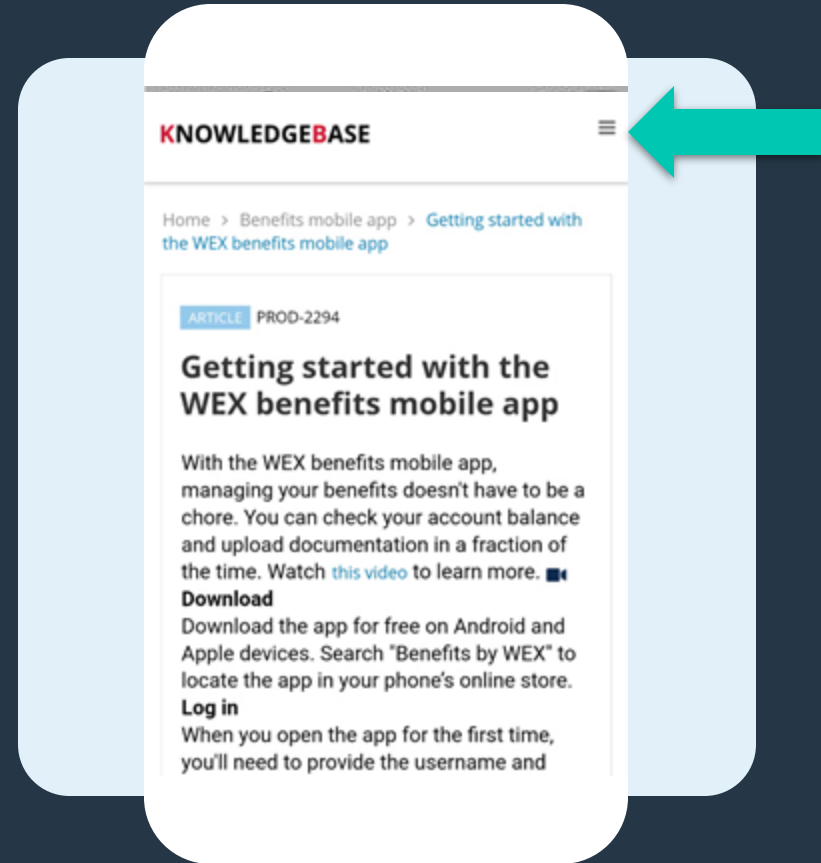




How to access the Knowledgebase in WEX benefits mobile app

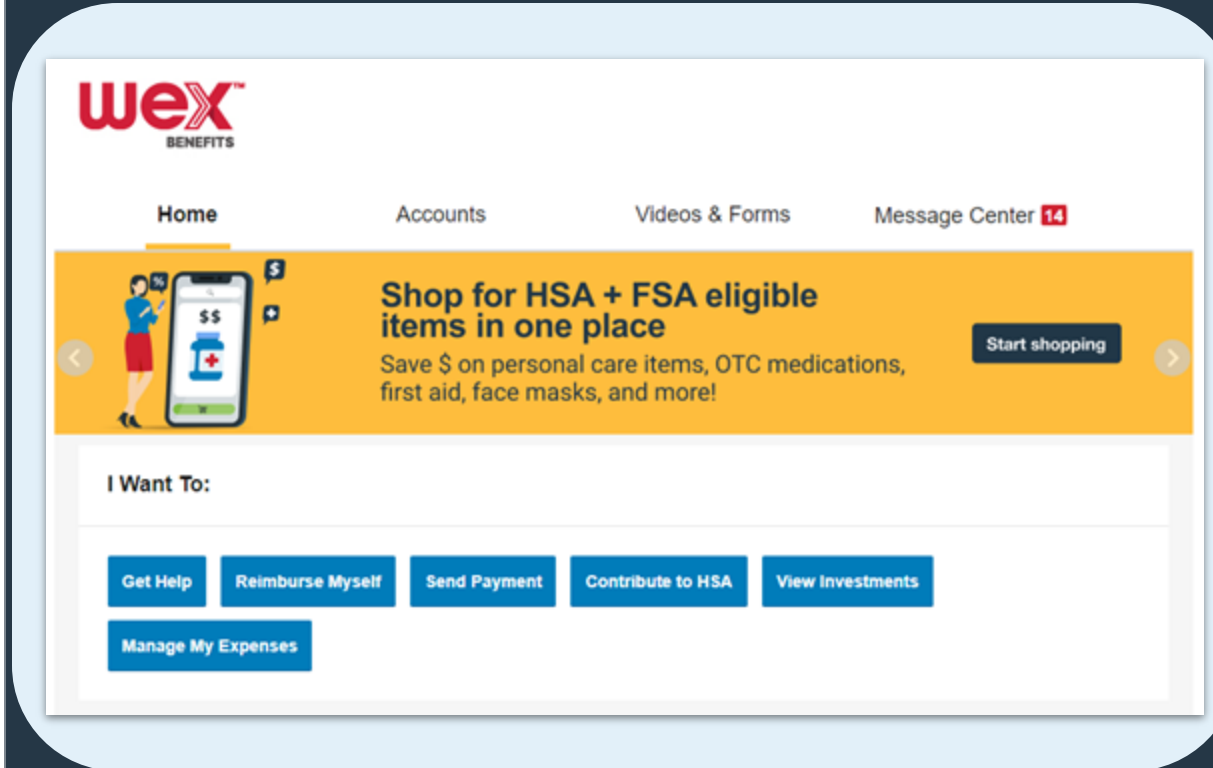
4

Select “Menu” icon to browse





How to access  
Knowledgebase in  
your online account



The screenshot shows the WEX Benefits website dashboard. At the top left is the WEX BENEFITS logo. The navigation menu includes Home (underlined), Accounts, Videos & Forms, and Message Center with a red notification badge showing '14'. Below the navigation is a yellow promotional banner for shopping HSA + FSA eligible items, featuring an illustration of a person with a smartphone and a pharmacy icon. The banner text reads 'Shop for HSA + FSA eligible items in one place' and 'Save \$ on personal care items, OTC medications, first aid, face masks, and more!', with a 'Start shopping' button. Below the banner is a section titled 'I Want To:' containing five blue buttons: 'Get Help', 'Reimburse Myself', 'Send Payment', 'Contribute to HSA', and 'View Investments'. A sixth button, 'Manage My Expenses', is located below these buttons.



How to access the Knowledgebase in your online account

**wex**  
BENEFITS

Home Accounts Videos & Forms Message Center **14**

**Shop for HSA + FSA eligible items in one place**  
Save \$ on personal care items, OTC medications, first aid, face masks, and more!

Start shopping

I Want To:

Get Help Reimburse Myself Send Payment Contribute to HSA View Investments

Manage My Expenses



How to access the Knowledgebase in your online account

**KNOWLEDGEBASE**

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- Authorized Representative Form - HIPAA
- Authorized Representative Form - HIPAA (Spanish)
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- Blocked health savings accounts (HSAs) and the USA PATRIOT ACT
- COVID-19 resources
- Canceling claims submitted in the online account or WEX Benefits mobile app
- Capital Expense Worksheet
- Carryovers for flexible spending accounts (FSAs) FAQ
- Claim Form
- Claim Substantiation Statement - Natural Disaster Form

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**KNOWLEDGEBASE**

Home > WEX benefits card > Common reasons for WEX benefits card declines

ARTICLE #PRO0-2243

## Common reasons for WEX benefits card declines

This article explains the common reasons for WEX benefits card declines. Watch [this video](#) to learn more. ■■

**Note:** For more information about declines specific to dependent care flexible spending accounts (dependent care FSAs), see [Pay with your benefits debit card using funds from your dependent care FSA](#).

**Ineligible expenses**  
Per IRS regulations, you must spend your funds on eligible expenses because benefits plans are funded with pre-tax dollars. See [Eligible expenses for benefits plans](#) for more information.

Scenario	Resolution
You use your benefits card to purchase one or more items not eligible under your plan.	The transaction will be declined. See <a href="#">Understanding WEX benefits card auto-approval for more information</a> .

**Over-the-counter (OTC) medications**  
Effective 1/1/2020, the IRS no longer requires prescriptions for OTC medications.

Scenario	Resolution
You attempt to use your WEX benefits card to purchase an OTC medication and the transaction is declined.	The merchant may still be in the process of updating its system. You can pay for the medication out of pocket and file a claim for reimbursement along with a copy of your

**Related Articles**

- Common reasons for WEX benefits card suspensions
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api.benefitservice.com/Authentication/CoocChat.aspx?loginname=&referer=http%3A%2F...

Question

[SUBMIT](#)

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**KNOWLEDGEBASE**

Home > WEX benefits card > Common reasons for WEX benefits card declines

APRICA P900-2243

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**Related Articles**

- Common reasons for WEX benefits card declines
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# Contact Participant Services

Our Participant Services team is available Monday through Friday, from 6 a.m. to 9 p.m. CT, except holidays.



## Live Chat

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Log into your online account



## Website

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[www.wexinc.com](http://www.wexinc.com)



## Phone

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### Current WEX participants:

866-451-3399

### New to WEX:

844-561-1337