CONSUMER PORTAL QUICKSTART GUIDE

Welcome

to your Benefit Accounts Consumer Portal.

This one-stop portal gives you 24/7 access to view information and manage your Working Spouse Program. It enables you to:

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

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

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

golden state foods

HOW DO I LOG ON TO HOME PAGE?

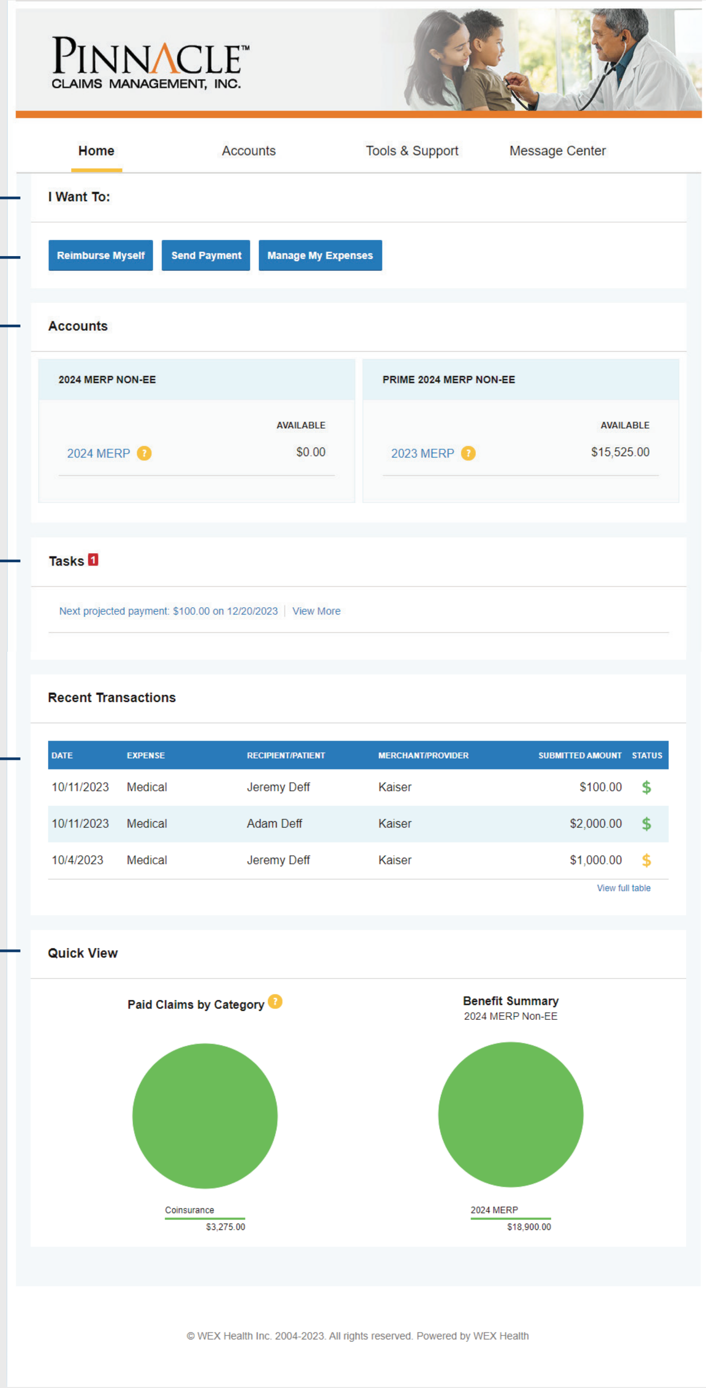
1. Go to gsf.pinnacletpa.com/WSP
2. Enter your Username and Password
   a. **Username:** Email Address
   b. **Temporary Password:** First Name initial + Last Name + DOB (ddmmyyyy). Initial and last name needs to be in all CAPITAL LETTERS.

   Example: John Doe October 24, 1972, would be: JDOE24101972
3. Click **Login.**

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

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

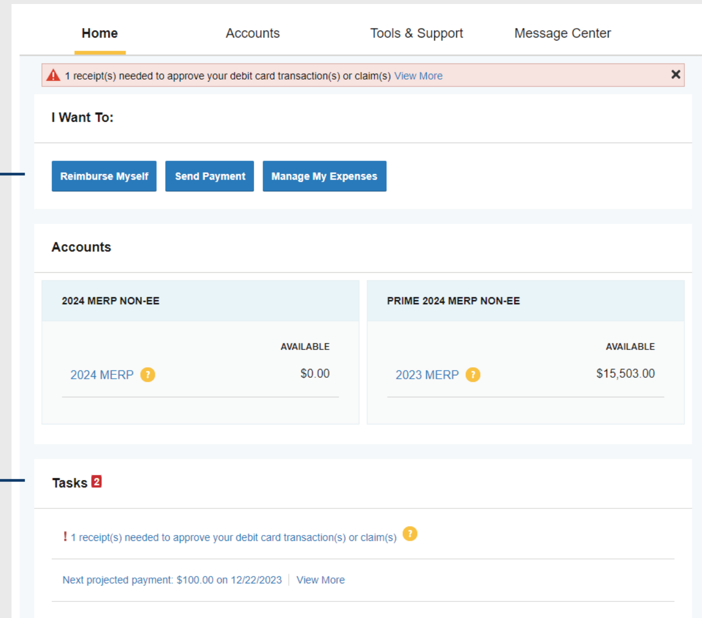
You can also hover over the tabs at the top of the page.

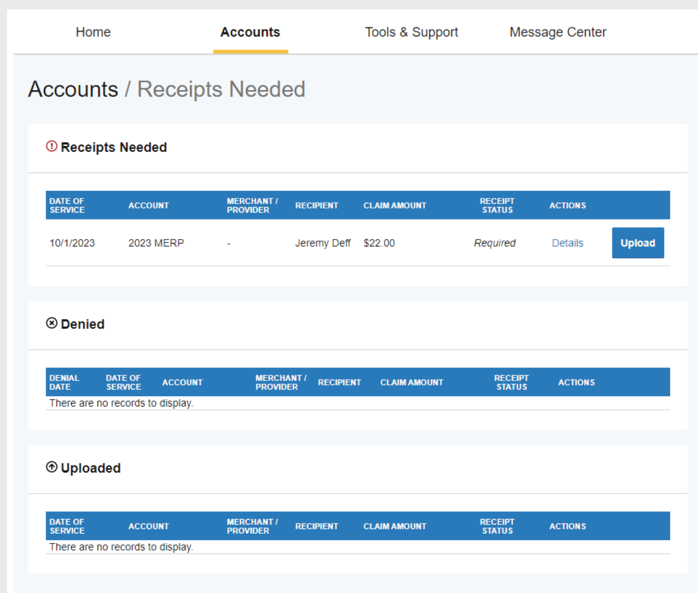


HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select **"Reimburse Myself"** or **"Send Payment** under the "I want to…" section, **OR** from any page on the portal, expand the **Accounts** tab on the top of the screen.
2. The claim filing wizard will walk you through the request including entry of information, payee details and uploading a receipt.
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in the **Transaction Summary**, agree to the terms and conditions click **Submit** to send the claims for processing.
5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a receipt, you can upload the receipt from this screen or print a **Claim Confirmation Form** to submit to the administrator with the required receipts.

NOTE: If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page or use one of your **Mobile Quick Receipts.**



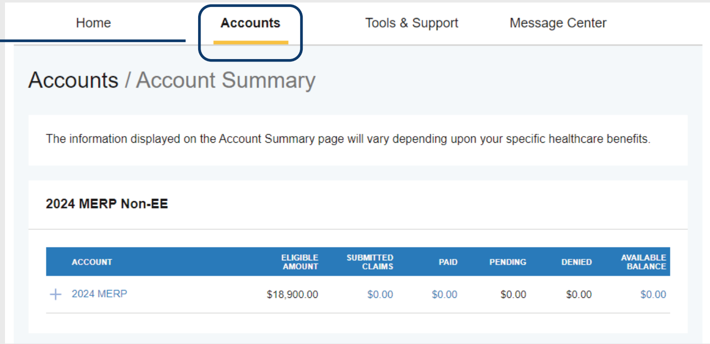


golden state foods

HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

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

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


Home | Accounts | Tools & Support | Message Center

Accounts / Account Summary

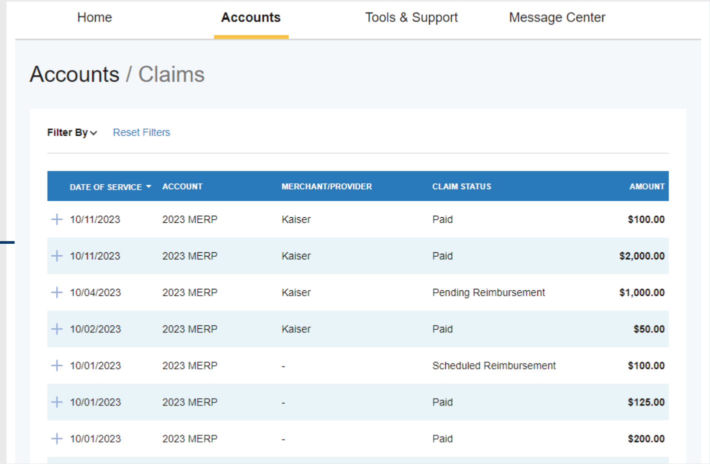
The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits.

2024 MERP Non-EE

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ 2024 MERP	$18,900.00	$0.00	$0.00	$0.00	$0.00	$0.00

HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

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


Home | Accounts | Tools & Support | Message Center

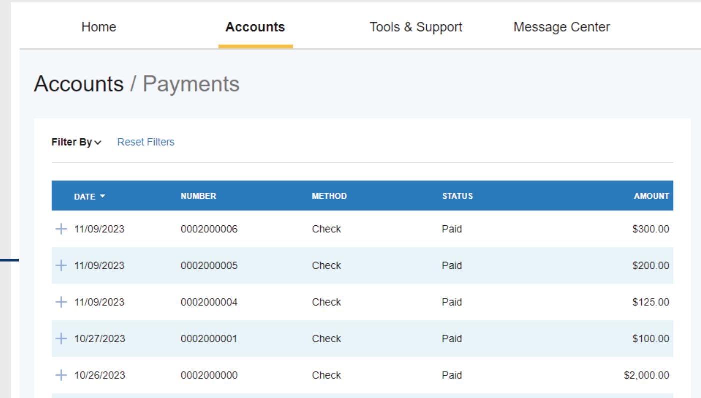
Accounts / Claims

Filter By Reset Filters

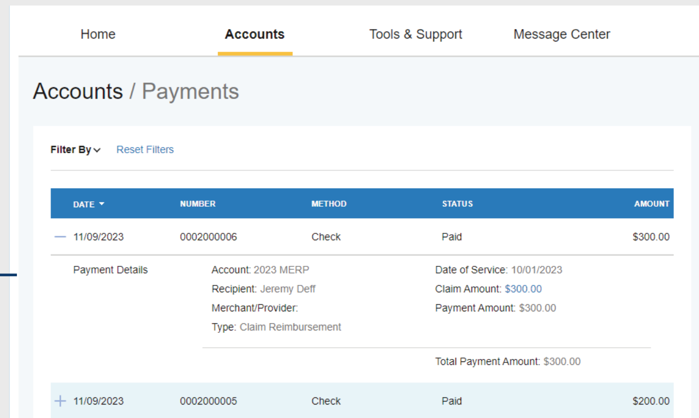
DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 10/11/2023	2023 MERP	Kaiser	Paid	$100.00
+ 10/11/2023	2023 MERP	Kaiser	Paid	$2,000.00
+ 10/04/2023	2023 MERP	Kaiser	Pending Reimbursement	$1,000.00
+ 10/02/2023	2023 MERP	Kaiser	Paid	$50.00
+ 10/01/2023	2023 MERP	-	Scheduled Reimbursement	$100.00
+ 10/01/2023	2023 MERP	-	Paid	$125.00
+ 10/01/2023	2023 MERP	-	Paid	$200.00

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.

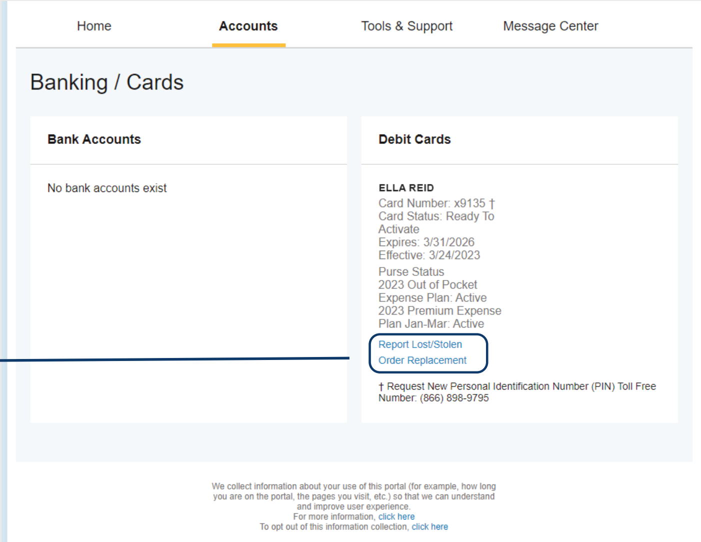


2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.

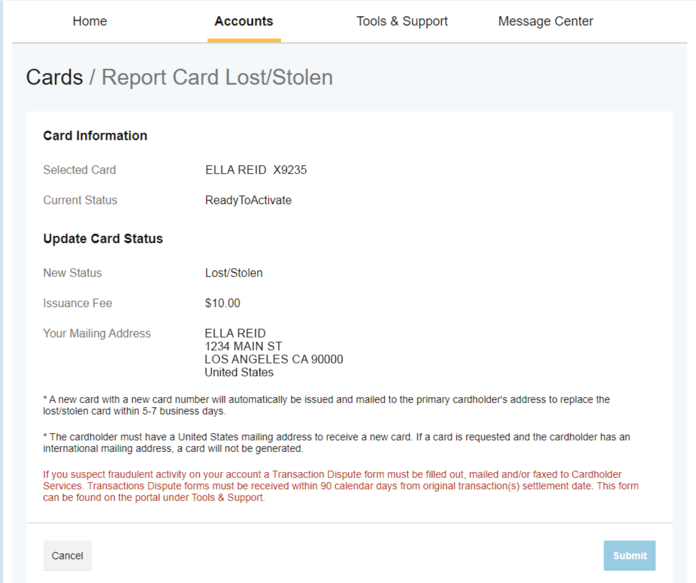


HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.



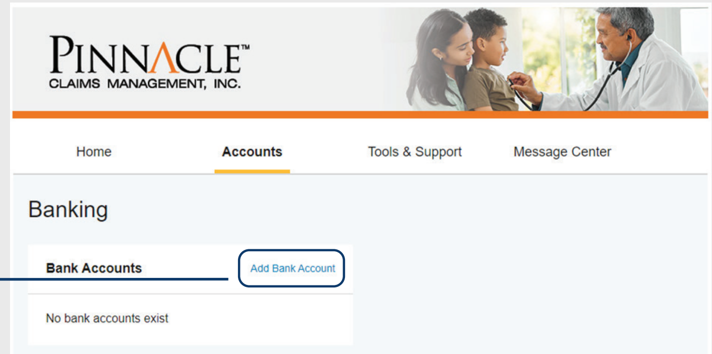
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.

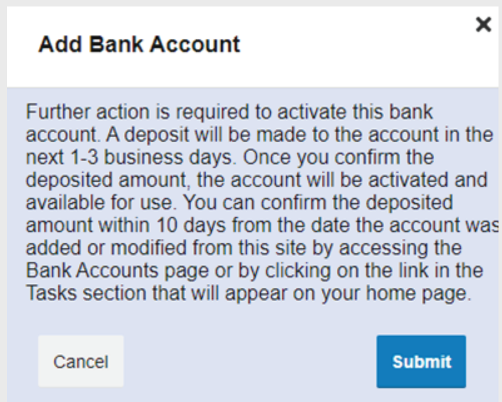


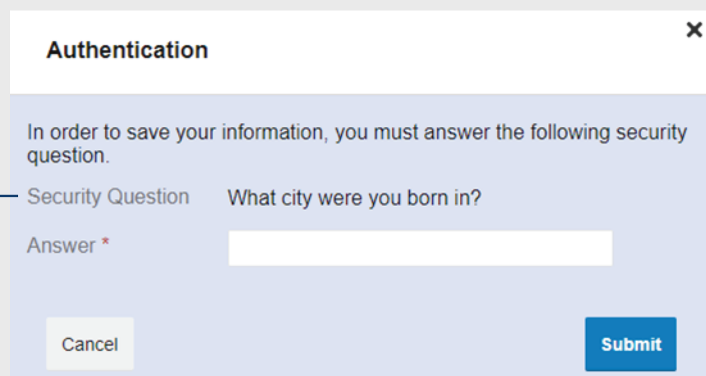
HOW DO I GET MY REIMBURSEMENT FASTER?

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

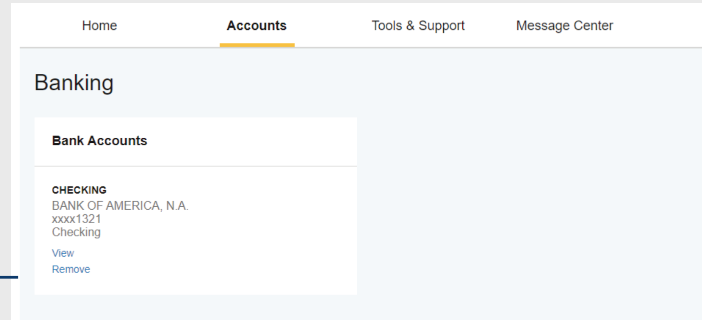
1. From the **Home Page**, under the **Accounts** tab, select Banking, and click on **Add Bank Account**.
2. Select **Update** for the appropriate plans. Update the secondary reimbursement method to **Direct Deposit.**
3. Enter your bank account information and click **Submit.**
4. The **Payment Method Changed** confirmation displays.
5. **If there is a bank validation requirement,** you will be notified on the portal to look for a small transaction or "micro-deposit" in your designated bank account in the next couple of days to enter online, which will validate your account.
6. An Authentication pop-up message will display. You must answer the security question and click Submit.



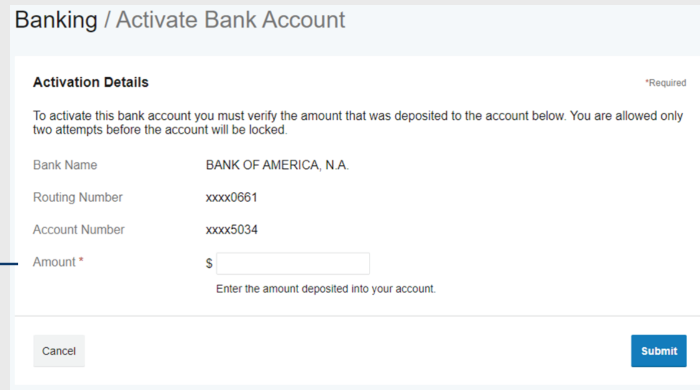




7. Your bank account will be added to your profile. To finish activating your account, click the Activate link.

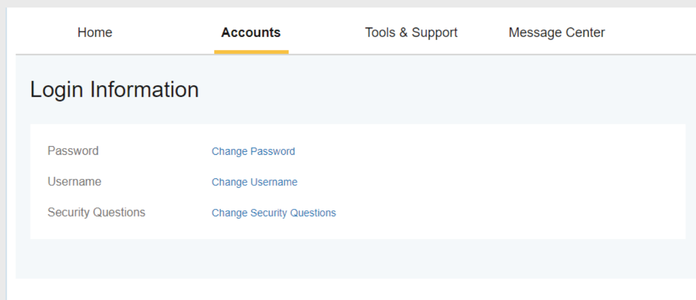


8. Enter the prenote amount that was deposited to your account and click Submit.



HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click **Save.**

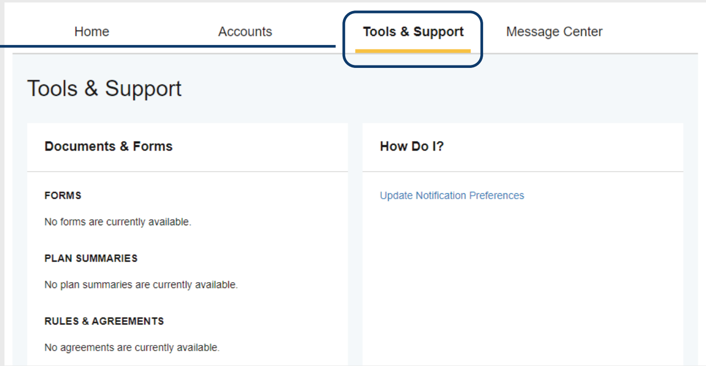


golden state foods

HOW DO I VIEW OR ACCESS:

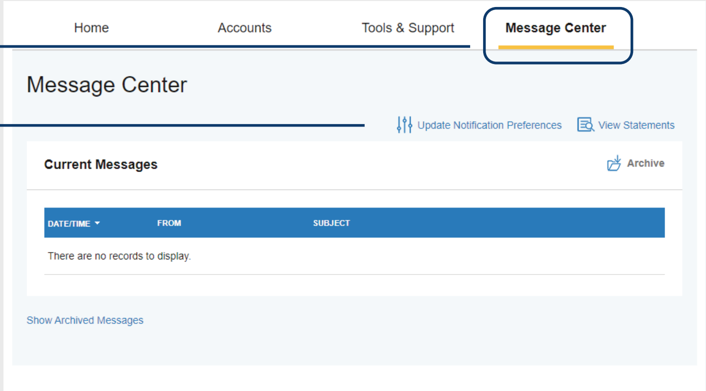
...DOCUMENTS & FORMS?

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



...NOTIFICATIONS?

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



...PLAN INFORMATION?

1. On the **Home Page,** under the **Accounts Tab**, you will be directed to the **Account Summary** page.
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.

OR from the **Home Page,** under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.