



NueSynergy

CUSTOMER FOCUSED • TECHNOLOGY DRIVEN

BENEFIT ACCOUNT WELCOME KIT



ONLINE REGISTRATION

Accessing your account through the online member portal will enable you to submit claims electronically for faster approval, access balance and claims history, important communications and more.

Setting up your account for online access is easy! Just follow the steps below.
(For additional help you can download the Registration Guide with step by step screen shots at www.NueSynergy.com.) **Your Employer ID Number is: NUESYNCHRONY**

TO BEGIN



CONTACT US **LOG IN** ▾

HOME YOUR SOLUTIONS ABOUT US RESOURCE CENTER STAY CONNECTED

NEW & DIFFERENT

Leader in Health Savings Accounts |

Bringing you access to a healthier future.

Solutions That Fit You,
Not Solutions You Must Fit

We've got you covered at every step.

- Go to www.NueSynergy.com
- Click "**LOG IN**" in upper right hand corner
- Click Participants in the dropdown

STEP 1

FOR PARTICIPANTS

Take Control of Your Benefits

We're here to make your life a little easier.

Log In as a Participant

Get instant access to your transaction history, update your personal information, enroll in benefits and more.

Benefit Enrollment
(HSA/HRA/FSA)

LOGIN

Participant
(HSA/HRA/FSA)

LOGIN

Participant
(COBRA)

LOGIN

- Click the box in the middle titled, **Participant (HSA/HRA/FSA)**

ONLINE REGISTRATION CONT.

STEP 2



We will maintain the confidentiality of your personal information in accordance with our privacy policy.

Sign in

Username *

Forgot your Username? [Let us help](#)

Password *

Forgot your Password? [Let us help](#)

✓ SIGN IN

Don't have an account?

REGISTER

- Under "Don't have an account?"- Click **REGISTER**

STEP 3

STEP 1 STEP 2 STEP 3 STEP 4

You are on step 1 of 4

Username *

Password *

Password Strength

Confirm Password *

First Name *

Initial

Last Name *

Email *

Registration ID *

NUESYNCHRONY

Employee ID *

Username must be between 6 and 12 characters long alphanumeric value

A valid password must contain between 8 and 16 characters.

A password must contain 3 of the following types of characters:

- AN UPPER CASE LETTER
- lower case letter
- Special Character (% , ! , @ , etc.)
- A number

A password cannot contain:

- The same character repeating 3 or more times
- The word "password"
- The username
- Spaces

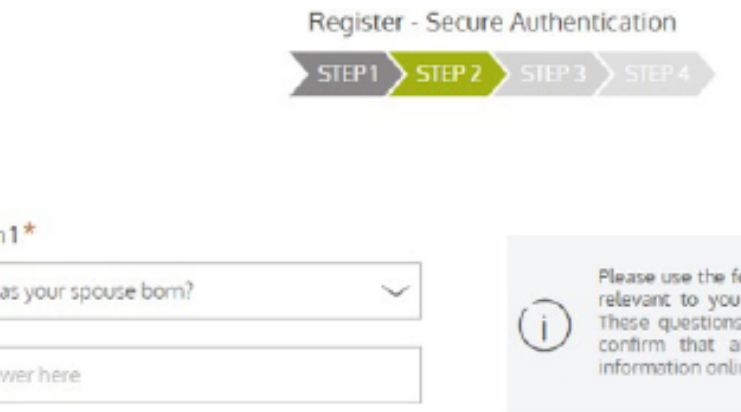
To register with this site, you must have an Employee ID which could be your Health Plan Member Number, Social Security Number, an ID provided by your Employer or an alternate ID created by your Administrator, and a Registration ID which could be your Benefit Debit Card Number or your Employer.

If you do not know your ID or were not provided an ID, please contact your Administrator.

- Read all instructions
- Start by creating a username
 - The username likely cannot be your email address as it will be too long. Username can only be 6-12 characters long
- When you get to **Registration ID**, make sure to click the arrow in the selection box and click on **Employer ID** in the dropdown
 - The Employer ID is **NUESYNCHRONY**
- Fill out remaining required fields
- Accept terms of use
- Click **NEXT**

ONLINE REGISTRATION CONT.

STEP 4



Register - Secure Authentication

STEP 1 STEP 2 STEP 3 STEP 4

n1*

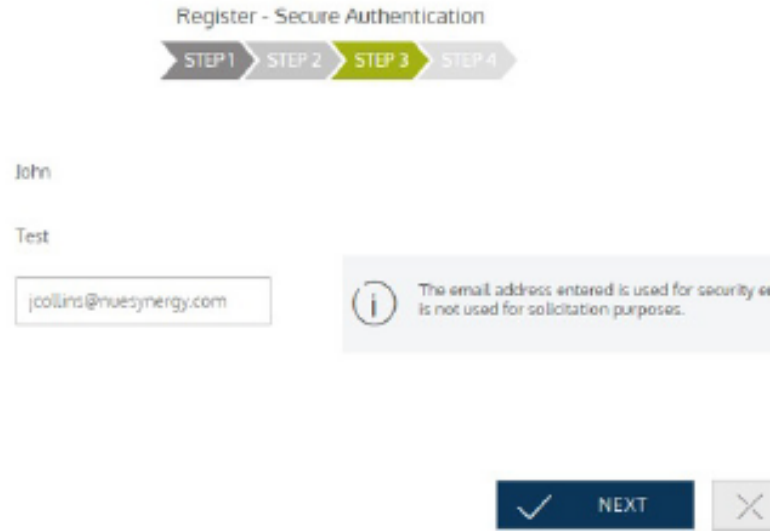
In which city was your spouse born?

Answer here

Please use the fields relevant to you. These questions confirm that all information online is accurate.

- Fill out **security questions**
- Click **NEXT**

STEP 5



Register - Secure Authentication

STEP 1 STEP 2 STEP 3 STEP 4

John

Test

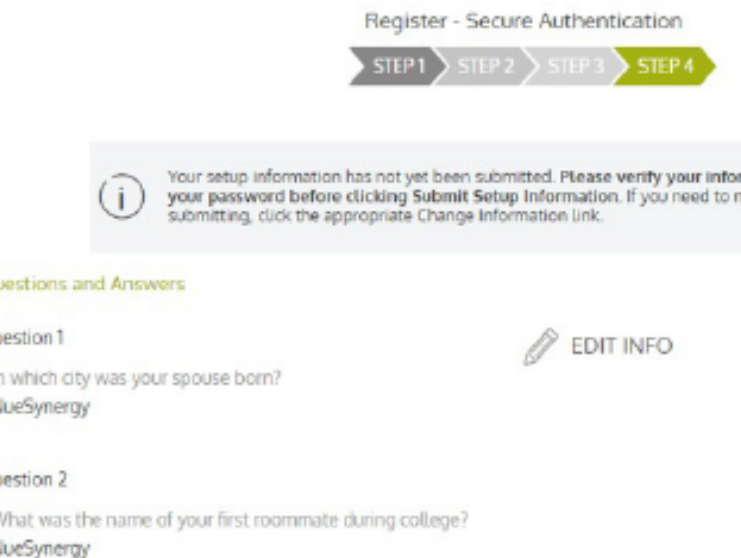
jcollins@nuesynergy.com

The email address entered is used for security and is not used for solicitation purposes.

NEXT

- Confirm your **email address**
- Click **NEXT**

STEP 6



Register - Secure Authentication

STEP 1 STEP 2 STEP 3 STEP 4

Your setup information has not yet been submitted. Please verify your information before clicking Submit Setup Information. If you need to make changes after submitting, click the appropriate Change Information link.

Questions and Answers

Question 1

In which city was your spouse born?

NueSynergy

EDIT INFO

Question 2

What was the name of your first roommate during college?

NueSynergy

- Confirm your **information**
- Click **SUBMIT**

YOU'RE FINISHED!



NueSynergy

Customer Focused • Technology Driven

1-855-896-7239

CustomerService@NueSynergy.com

register

Success

You have successfully completed the registration process.

The next time you sign on to access your account information you will be asked to provide your username and password.

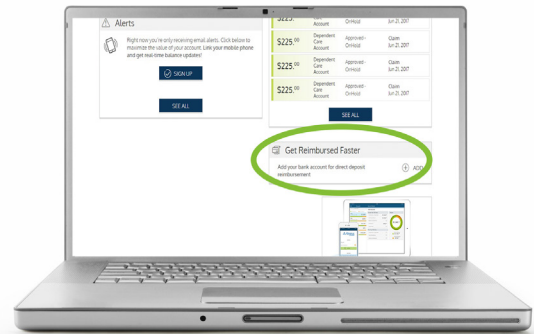
To protect your personal information you may occasionally be required to complete additional authentication.

- **You've successfully completed the registration process!**

HOW TO SET UP DIRECT DEPOSIT FOR CLAIMS REIMBURSEMENT

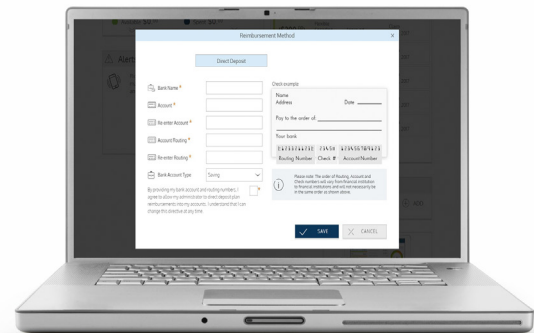
STEP ONE

- After registering, sign in to your account and select 'Get Reimbursed Faster' on the homepage



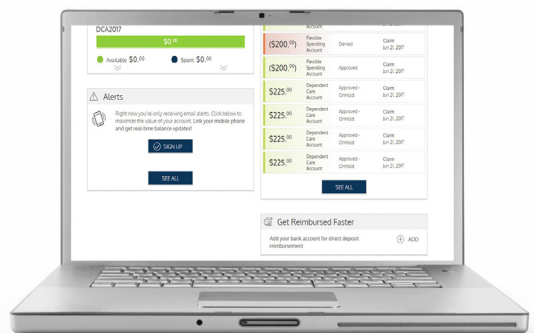
STEP TWO

- Review the example on the screen of where to find your routing and account number on your check
- Input both numbers exactly as they appear on your check.
- Click save



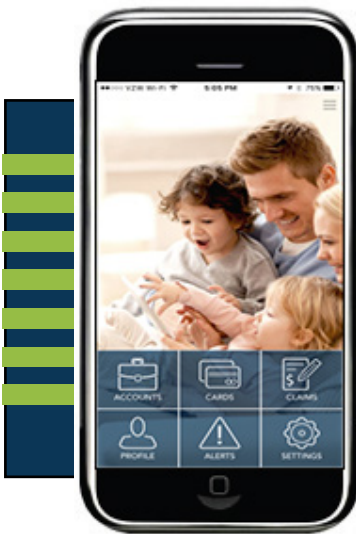
YOU'RE FINISHED!

- You've successfully completed the online direct deposit process



NUESYNERGY MOBILE APP

NueSynergy is excited to offer you a new way to access your account! By downloading the NueSynergy Mobile app on either your Apple or Android mobile device, you will have a single access point to manage your benefit account.



NueSynergy Mobile **enables you to:**

- See detailed account information
- View your account balance and plan details
- Review recent transactions and details
- View all email and SMS alerts
- Contact administrator from mobile application via email or mobile phone
- Submit a claim for substantiation
- Take a photo of a receipt or bill and attach it to a new or existing claim or debit card transaction for approval

You can download the NueSynergy Mobile Application by going to either the App Store on your Apple device or GooglePlay on your Android and searching for NueSynergy:

STEP ONE

- Access App Store (iPhone) or GooglePlay (Android)
- Search for NueSynergy
- Select install and accept app permissions
- Select the app once NueSynergy Mobile is downloaded



STEP TWO

- Sign in using the same username and password as for your Participant Portal at www.NueSynergy.com
(If you have not setup your account on the participant portal, you will need to do so before signing onto NueSynergy Mobile)

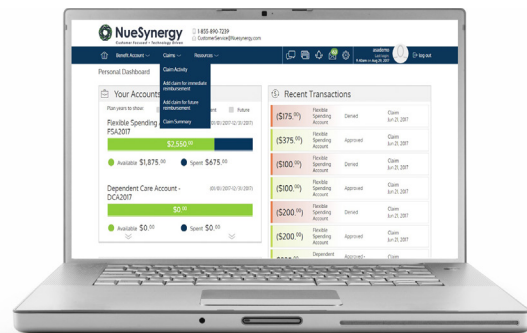
HOW TO FILE A CLAIM

FILE YOUR CLAIM ONLINE

One of the easiest ways to submit your claim for reimbursement is by completing our online claim form at www.NueSynergy.com. Once your claim is processed an email notification will be sent to your email address on file confirming approval or requesting additional documentation.

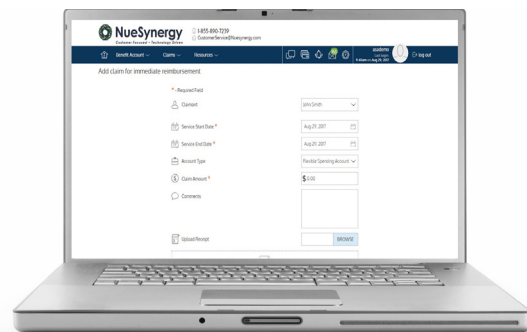
STEP ONE

- Go to www.NueSynergy.com
- Log-in to your online account
- Click claims
- Select add claim for immediate reimbursement or
- Add claim for future reimbursement



STEP TWO

- Enter your claim detail
- Drag and drop, or upload your scanned receipts
- Read certification statement
- Click box to agree
- Click submit



HOW TO FILE A CLAIM

FILE YOUR CLAIM WITH NUESYNERGY MOBILE

Filing a claim with the free NueSynergy mobile app is fast and easy. Once your claim is processed, an email notification will be sent to your email address on file confirming approval or requesting additional documentation.

STEP ONE

- Log-in to the NueSynergy Mobile App
- Click claims
- Select add claim for immediate reimbursement or
- Add claim for future reimbursement



STEP TWO

- Take photo of receipt and upload
- Select preview after taking your photo
- Select submit if all information is correct
- Accept the disclosure



NUESYNERGY DEBIT CARD

The NueSynergy benefits debit card provides a convenient method to pay for out-of-pocket medical expenses for you, your spouse and/or any tax dependents. The IRS imposes strict regulations on where the NueSynergy benefits debit card can be used and when follow-up documentation is required to substantiate a qualified expense. The card is a convenient benefit, but it is important that you take a moment and understand how it works.

Where is the NueSynergy benefits debit card accepted?

Participants can use the debit card at qualified merchants (as determined by the employer's plan document) to pay for:

- Office visit co-pays
- Deductible-related expenses
- Prescriptions
- Dental work (including orthodontia)
- Eyeglasses & contacts

How does NueSynergy verify that the benefits debit card is used only for qualified expenses?

The IRS-imposed limitations help ensure that the card is used only for qualified expenses. When the card is swiped at a qualified merchant and there is a sufficient balance available in the participant's benefit account, the qualified purchase will be paid directly from the reimbursement account.

The IRS requires participants to keep all receipts for benefit account expenses for seven years in the event of a tax audit. If there is a discrepancy or unusual transaction amount, NueSynergy is required by the IRS to verify the transaction. If a transaction cannot be electronically substantiated a participant will be sent a notification via email to submit a third-party receipt showing the date of service, description or type of treatment and the amount owed.

All plan communication pertaining to your account activity is provided solely via email at the www.NueSynergy.com website. It is important to notify NueSynergy if you change your email address.

What are the advantages of using the NueSynergy benefits debit card?

Participants who use the card at qualified merchants may pay for eligible expenses without having to submit a claim and wait for reimbursement. Participants can logon to www.NueSynergy.com for real-time, online account information including balance, deposits made to date and a list of pending and completed payments.

Recurring benefit debit card expenses for the exact amount at the same provider can be set up as a recurring transaction. When you submit your initial documentation, please include a note stating the transaction will be a recurring expense. This will prevent the need for additional documentation on future purchases of the same item purchased at the same provider.

Does the participant always have to use the NueSynergy benefits debit card for claim reimbursement?

No. There will be times when a merchant does not accept the benefits debit card. This does not mean that the expense is not eligible. Participants will need to pay for the expense from their personal funds and then submit a claim for reimbursement. Claim forms are provided to participants at Open Enrollment and can be found at www.NueSynergy.com.

How do I send my required documentation for substantiation of my NueSynergy benefits debit card transactions?

You can submit documentation by using NueSynergy Mobile, your member portal at www.NueSynergy.com, fax, email or mail completed forms and copies of bills, receipts, or invoices to:


NueSynergy, Inc.
4601 College Blvd., Ste. 280, Leawood, KS 66211
Fax: 855.890.7238 Email: customerservice@NueSynergy.com

*The debit card is not offered with all plans.

NUESYNERGY CONTACT US

Have questions about your account? NueSynergy is here to help! Our knowledgeable team will make sure you get the support you need. We look forward to hearing from you.

 NueSynergy, Inc.
4601 College Boulevard, Suite 280
Leawood, KS 66211

 855.890.7239 (ext. 3)

 sales@nuesynergy.com

NueSynergy **ABOUT US**

Since 1996, NueSynergy has provided clients with full-service administration of consumer-driven and traditional account-based plans, as well as COBRA administration. Located in Leawood, Kansas, we have built a reputation throughout the US with both Fortune 1000 corporations and small businesses for our technology-based solutions and knowledgeable, personalized service. All operational divisions from executive management to customer service are housed at our corporate headquarters. This operational design translates into improved communication and operational efficiencies, ensuring clients receive faster, seamless service. NueSynergy offers a fully integrated suite of administration services, managed by subject matter experts with an average of 10 years direct industry experience.

Our administration services include:

- Health Savings Accounts