

## How to pay a provider using the BenefitWallet® mobile app

You can quickly and easily pay a health care provider with the BenefitWallet mobile app, either with a paper check or electronic transfer. For an electronic transfer, you will need to know the account and routing numbers for your provider.



Log in to the BenefitWallet mobile app.

- If you have forgotten your User ID, tap Forgot User ID.
- If you have forgotten your Password, tap Forgot Password.
- If you have never logged in to the mobile app before, tap *Register*.



To get started with paying a provider using your HSA:

- Tap Pay A Provider on the home screen.
- Select the **Payment Type** by tapping **Paper Check** or **Electronic Transfer**.
- For **Paying To**, select the provider to pay by tapping **Select/Add Provider**.
  - If you have already saved one or more providers, tap the provider's name from your list and then tap **Select Provider**.
  - If you need to add a new provider, click here for instructions on how to add a provider to pay by paper check or click here for instructions on how to add a provider to pay by electronic transfer.
- Enter the Amount To Pay and tap Continue.

1	0	< Pay a Provider	× < Select Provider
ACCOUNTS Health Savings Account (HSA) \$1,973.25 Available			Add a new provider
		Health Savings Account (HSA) XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	\$1,973.25 Dr. Wendy Forman
		Payment Type	Dr. Akash Patel
Investment Total* Open	\$0.00 \$1,973.25 XXXXXXXXXXX9006	Paying To No provider selected.	Dr. Robert Davidson
• • • •		Choose or add a provider to continue. SELECT / ADD PROVIDE	Dr. Susan Wagner
	3 (đ)	Amount to Pay Amount	
PAY A REIM PROVIDER MY RECENT	BURSE MAKE SELF CONTRIBUTION		
Activity Review Held - 4034 Activi	Needed ties		
POSTED PROC	ESSING PENDING		SELECT PROVIDER
28 Interest Posted	Through 02/29 \$0.16	CONTINUE	EDIT PROVIDER



Complete the next several screens to submit payment to your provider:

- Frequency: Select One time or Recurring.
- Send On: Indicate the issue date by manually entering the date or by tapping the calendar icon and making a selection.
- Attach Document: Attach and upload any document from your phone or take a picture using your phone's camera.
- **Transaction Memo**: If paying the provider by check, indicate text to be printed on both the check and the check stub (e.g., an invoice number or account number).
- Note to Payee: If paying the provider by check, indicate text to be printed on the check for the payee's reference (e.g., an invoice number or account number).

To finish paying your provider from your HSA:

- Confirm you've entered all of the information correctly.
- Acknowledge the Sufficient Funds notice by tapping *I Agree*.
- A screen will display confirming your payment was successfully scheduled.

C Pay a Provider X           Frequency           One-time         Recurring	C Pay a Provider X           Health Savings Account (HSA)           XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Pay a Provider     X Health Savings Account (HSA)     X00000000000006     S1,973.25 Payment Summary	Pay a Provider
Send On Issue Date 04/07/2020  Attach Document You may upload documentation for your records  ATTACH  Transaction Memo Prints on Check and Check Stub  Note to Payee Prints on Check Stub only	Payment Type     Paper Check       Payment to     Dr. Wendy Forman       Payment Amount     \$100.00       Frequency     One Time       Issue Date     03/02/2020       Note to Payee     Visit on Feb 12th       Total to be paid     \$100.00	<text><text><text></text></text></text>	A payment of \$100.0 will be paid via PAY_CHECK Dr. Wendy Forman You're all done here!
CONTINUE	SUBMIT	SUBMIT	CLOSE

## Add New Provider: Pay by Paper Check

To add a new provider to **pay by paper check**, follow the steps below.

- From the Select Provider screen, tap Add a new provider.
- On the **Add Provider** screen, complete the required fields:
  - 1. Name: The name of the provider to be printed on the check
  - 2. Address Line 1: The address to send the check to
  - 3. Address Line 2 (optional): Second line for address, if needed
  - 4. **City**: The provider's city
  - 5. State: When tapped, loads the Select State screen; tap the appropriate state
  - 6. Zip Code: Accepts 5-digit and 9-digit zip codes
- When complete, a screen will display confirming your provider was successfully added.

Select Provider	< Add Provider	< Select State	Add Provider
Add a new provider         Dr. Wendy Forman         Dr. Akash Patel         Dr. Robert Davidson         Dr. Susan Wagner         Dr. Diego Garcia	Name         Address Line 1         Address Line 2         City         State       >         Zip Code	AA - AA MILITARY AE - AE MILITARY AK - ALASKA AL - ALASAMA AP - AP MILITARY AR - ARKANSAS ✓ AZ - ARIZONA CA - CALIFORNIA CO - COLORADO CT - CONNECTICUT DC - DISTRICT OF COLUMBIA	Provider info successfully added. Dr. Wendy Forman O You're all done here!
SELECT PROVIDER	CONTINUE	DE - DELAWARE	CLOSE

## Add New Provider: Pay by Electronic Transfer

To add a new provider to pay by electronic transfer, follow the steps below.

- From the Select Provider screen, tap Add a new provider.
- On the **Add Provider** screen, complete the required fields:
  - 1. Provider Name: The name of the provider you're paying by electronic transfer
  - 2. Routing Number: The routing number provided by the provider
  - 3. Account Number: The account number provided by the provider
  - 4. Confirm Account Number: Confirmation of the account number
- When complete, a screen will display confirming your provider was successfully added.

Add a new provider     Dr. Wendy Forman     Dr. Akash Patel   Dr. Robert Davidson Dr. Susan Wagner Dr. Diego Garcia   Dr. Diego Garcia     Account Number   U.S. Check   U.S. Check   U.S. Check   U.S. Check   Souting Mumber Vou're all done here!	< Select Provider	< Add Provider	Add Provider
Dr. Wendy Forman  Dr. Akash Patel  Dr. Robert Davidson  Dr. Susan Wagner  Dr. Diego Garcia  Account Number  Confirm Account Number  U.S. Check  U.S. Check  Confirm Account Number  Notice all done here!	• Add a new provider	Direct Deposit Details Direct deposit details are required when using Electronic Transfer to pay a provider	
Dr. Robert Davidson Dr. Susan Wagner Dr. Diego Garcia Account Number Confirm Account Number U.S. Check U.S. Ch	Dr. Wendy Forman  V Dr. Akash Patel	Provider Name	
Dr. Diego Garcia  Account Number  Account Number  Confirm Account Number  U.S. Check  U.S. Check  South Stress South Stres	Dr. Robert Davidson	Routing Number	
Dr. Diego Garcia Dr. Wendy Forman Confirm Account Number Vou're all done here! U.S. Check U.S. Check U.S. Check U.S. Check U.S. Check	Dr. Susan Wagner		Provider info successfully added.
Confirm Account Number U.S. Check	Dr. Diego Garcia	Account Number	Dr. Wendy Forman
U.S. Check			$\bigcirc$
U.S. Check		Confirm Account Number	You're all done here!
		U.S. Check	
SELECT PROVIDER Number	SELECT PROVIDER	Number Number	
EDIT PROVIDER CLOSE	EDIT PROVIDER	CONTINUE	CLOSE