

## Checking Your Balance and Transactions

### STEP 1

Log in to your account to check the **balance of your accounts**, and to **view your debit card transactions**\*.

- a. In the left column, you see the various accounts you have elected to participate in through your employer.

Your available balance is the number listed to the right<sup>1</sup>. *In this example the participant has \$900 available in her FSA account, and \$2,800 available in her HRA account.* Click on the account type, to see how much has been spent so far this plan year, and how much you elected<sup>2</sup>.

- b. On the right side of the screen is where you'll find any alerts that you need to know<sup>3</sup>. *Examples of the information you would find here are claims denials, or a request for a receipt.*

\* Your home page and accounts may look different from what you see here, but the information will be in the same places.

### STEP 2

Below the alerts, you will find **Recent Transactions** and **Pending/Unpaid Transactions**. **Click View All** to see a Transaction History.

Recent Transactions				
Service Date(s)	Description	Type	Amount	Actions
01/01/2019	Blonde Doctor	Manual Claim	\$350.00	<a href="#">View Details</a>
02/12/2019	mr mister	Debit Card	\$100.00	<a href="#">View Details</a>
02/12/2019	mr mister	Debit Card	\$100.00	<a href="#">View Details</a>
02/12/2019	mr mister	Debit Card	\$150.00	<a href="#">View Details</a>
02/12/2019	mr mister	Debit Card	\$150.00	<a href="#">View Details</a>
<a href="#">View All</a>				
Pending/Unpaid Transactions				
Service Date(s)	Description	Type	Amount	Actions
02/12/2019	mr mister	Debit Card	\$100.00	<a href="#">View Details</a>   <a href="#">Add Receipt</a>
02/12/2019	mr mister	Debit Card	\$50.00	<a href="#">View Details</a>   <a href="#">Add Receipt</a>
02/12/2019	mr mister	Debit Card	\$50.00	<a href="#">View Details</a>   <a href="#">Add Receipt</a>
02/12/2019	mr mister	Debit Card	\$50.00	<a href="#">View Details</a>   <a href="#">Add Receipt</a>
<a href="#">View All</a>				

Continued next page.

- a. At the top, you see **Transactions Requiring Attention**. This person needs to upload a receipt for a claim. They would just click **upload receipt**<sup>4</sup> to attach a scan or photo of the receipt to the claim<sup>5</sup>.

**Receipt Details**

Claim Details

Claimant: Lindsay Smith  
Service Start: 2/12/2019  
Denied Amount: \$0.00  
Claim#: 457  
Review Status: Pending  
Claim Received Date: 02/12/2019

Transaction Type:  
Service End: 2/12/2019  
Total Claim Amount: \$130.00  
Entered Date: 2/12/2019  
Reviewed Date:  
Service Category:

Provider:  
Approved Amount: \$300.00  
Claim Status: Request  
Entered By: Card Transaction Service  
Reviewed By:

Receipt Details

Upload Receipt(s):

Max Size: 100mb. Supported formats: pdf, bmp, gif, jpg, eps, ttf, or png.

summit Logo LindsaySmith Support Documents Logout Aug 03, 2019 12:47PM CST

Home Coverages **Transactions** Cards

Transaction History Transactions Claims Vault™ Transaction History

Transaction Search [Show](#)

Transactions Requiring Attention

Service Date(s)	Description	Type	Claimant	Original Amount	Processed Amount	Status	Action Required
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$100.00	Receipt Overdue	Upload Receipt
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$50.00	Receipt Overdue	Upload Receipt
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$50.00	Receipt Overdue	Upload Receipt
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$50.00	Receipt Overdue	Upload Receipt

Recent Transactions [Hide](#)

Add/View Online Claims

Plan	Service Date(s)	Description	Type	Claimant	Original Amount	Processed Amount	Reimbursement Method	Status
FSA	01/01/2019 01/01/2019	Blonde Doctor	Manual Claim	Lindsay Smith	\$350.00	\$350.00	Check	Approve
HRA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
FSA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
HRA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue
FSA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue

- b. Below **Transactions Requiring Attention** is the history of **Recent Transactions**, or any activity that affects the balance of your accounts. Such as:

- Card transactions
- Reimbursements
- Manual claims that have been submitted

Recent Transactions [Hide](#)

Add/View Online Claims

Plan	Service Date(s)	Description	Type	Claimant	Original Amount	Processed Amount	Reimbursement Method	Status
FSA	01/01/2019 01/01/2019	Blonde Doctor	Manual Claim	Lindsay Smith	\$350.00	\$350.00	Check	Approve
HRA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
FSA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
HRA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue
FSA	02/12/2019 02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue

Here, you can see which benefit plan the transaction affects, the service date, a description, the type of transaction, claimant, amount, reimbursement method, and transaction status. **Click the word under transaction type to view even more details of each transaction**<sup>6</sup>.

**Transaction Details**

Requested Reason:  
Claimant: Lindsay Smith  
Provider: Blonde Doctor  
Claim Status: Approved  
Service Code Description: [Click Here](#)

Service Start: 1/1/2019  
Service End: 1/1/2019  
Approved Amount: \$350.00  
Denied Amount: \$0.00  
Claim Number: 152

Reimbursement Details:  
Reimbursement Date: N/A  
Reimbursement Method: N/A  
Reimbursement Amount: \$0.00  
Reimbursement Start To: N/A

Type: Communication Date: Communication Type: Communication Method: E-mail Address: No send Date

Plan Details:  
Affected Plan: Plan Amount:  
FSA \$10.00  
Plan ID: 739  
Plan Start: 1/1/2019  
Plan End: 12/31/2019  
Plan Description: FSA  
Group Period: N/A  
Run-out Date: 12/31/2019

- c. If you need to find a specific transaction, just **click the Show button** by transaction search<sup>7</sup>, and you can search for a transaction by check or claim number, or by any of the options listed here<sup>8</sup>.

You can also go directly to the transaction history page from the blue navigation bar at the top of your screen<sup>9</sup>.

**Transaction Search** [Hide](#)

Check Number:  OR Claimant:  Card Number:

Claim Number:  Plan:  Start Date:

Transaction Type:  End Date:

Submission Method:

Reimbursement Method:

**If you have further questions, please contact your benefits representative.**

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