MEMBER PORTAL QUICKSTART GUIDE

Welcome to your RSI Benefit Accounts Member Portal. This one-stop portal gives you 24/7 access to view information and manage your account. 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

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,
2. Hover over or click on the six tabs at the top.
HOW DO I LOG ON TO HOME PAGE?

1. Go to www.rsiadmin.com
2. Click on the "1Cloud Member Login" Button.
3. Enter your login ID and password. If this is your first time logging on, your login ID will be the first initial of your first name, followed by your last name, followed by the last 4 digits of your social security number. For example: If your name is John Doe with a social security number of 123456789, your username will be: JDoe6789
   Your temporary password will be: password1
4. Click Login. Upon logging in for the first time you will be asked to create a new password and set up security questions.

The Home Page is easy to navigate:

- Easily access the Available Balance and “I Want To” sections from the left-hand navigation area.
- The I Want To…section contains the most frequently used features for the Member Portal.
- In the left-hand column Available Balance links to the Account Summary page, where you can see and manage your accounts.
- The Message Center section displays alerts and relevant links that enable you to keep current on your accounts.
- 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 the “File a Claim” under the “I want to…” section which can be located on the lefthand side of the home page. OR from any page on the portal, expand the “I want to…” section on the right hand side of the screen.

2. Enter your claim information, and upload the receipt, on the form that appears and click Add Claim. The claim is then added to the Claims Basket.

3. For submitting more than one claim, click Add Another Claim, select the Account Type and complete the form and click Add Claim.

4. When all claims are entered in the Claims Basket, 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, print another Claim Confirmation Form to submit to RSI, attaching the required receipts OR if a receipt is required, you will see the Upload Receipt link. Click on it and the Receipts Needed screen displays.

6. For each claim that requires a receipt, click Upload Receipt on the far right and follow instructions. (Your receipt must be in pdf, jpg, or gif format.)

7. The Receipt Uploaded confirmation appears: “Your receipt has been uploaded. You may upload additional receipts if needed until the claim is approved.”

8. After uploading, you may also click View Confirmation and print the form for your records.

NOTE: If you see a Receipts Needed link in the Message Center section of your Home Page, click on it. A listing of any Claims Requiring Receipts will appear.
HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the Home Page, see the Available Balance section.
2. For all Account Activity, click on the Available Balance link 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 “Eligible Amount” to view enrollment detail.

ALL HEALTH CARE EXPENSE ACTIVITY IN ONE PLACE

To view and manage ALL healthcare expense activity, use the DASHBOARD.

1. On the Home Page, under the Dashboard tab. The 1View Dashboard provides you with an easy-to-use consolidated view of healthcare expenses for ongoing management of medical claims, premiums, and card transactions.
2. Easily filter expenses by clicking on the filter options on the navigation pane on the left side of the screen or, by clicking on the field headers within the Dashboard.
3. You can search for specific expenses using the search field on the bottom left side of the screen.
4. Expenses can be exported into an Excel spreadsheet by clicking on the Export Expenses button on the upper left side of the page.
HOW DO I ADD AN EXPENSE TO THE DASHBOARD?

1. From the **Dashboard** click on the **Add Expense** button in the upper left side of the page.
2. Complete the expense detail fields. You can even upload a copy of the receipt and, add notes for your records.
3. Once the expense has been added to the dashboard you can pay the expense, if desired.

HOW DO I PAY AN EXPENSE?

1. You may process payments/ reimbursements for unpaid expenses directly from the **Dashboard** page.
2. Expenses will be categorized and **payment** can be initiated for unpaid expenses by clicking on the button to the right of the expense details.
3. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment.
4. When you click **Pay**, the claim details from the **Dashboard** will be pre-populated within the claim form. Review & edit the claim details as needed.
HOW DO I EDIT AN EXISTING EXPENSE IN THE DASHBOARD?

1. You can edit expense details for all claim statuses directly from the Dashboard page.
2. Expand the claim details visible by clicking on the expense line item from the Dashboard.
3. You will be presented with options to add expense notes, update the expense details, mark the expense as paid/unpaid or, remove the expense from the Dashboard.

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 Profile, click the Banking/Cards link on the lefthand side of the screen.
2. Under the Debit Cards column, click Report Lost/Stolen or Order Replacement and follow instructions. Additional debit cards will be $5 for two cards. The $5 will be automatically deducted from your healthcare account. Please allow 7-10 business days for delivery.
HOW DO I UPDATE MY PERSONAL PROFILE?

1. From the Home Page, under the Profile, you will find links to update profile information including profile summary details, dependents, and beneficiaries.
2. Click the appropriate link on the Profile screen for your updates: Update Profile. Some profile changes will require you to answer an additional security question.
3. Complete your changes in the form.
4. Click Submit.

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.

1. From the Home Page, under the Tools&Support tab, click Change Payment Method under the “How Do I” section.
3. Enter your bank account information, and click Submit.
4. The Payment Method Changed confirmation displays.

HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the Home Page, click on the Profile tab, and click Login Information on the left-hand navigation bar.
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.

MORE HELPFUL INFORMATION...

From the Home Page, under the Tools & Support tab, you may find links that connect you to helpful information supplied by Reimbursement Specialists, Inc. These may be links to your website or to other valuable resources that enable you to manage your healthcare more effectively.