



# Manage your spending account online

Your guide to finding the **what, where and how**

## Your account is ready to use

You have a spending account — that's great! And with convenient online tools and resources, you can easily manage your account anytime, anywhere. This guide shows you how.

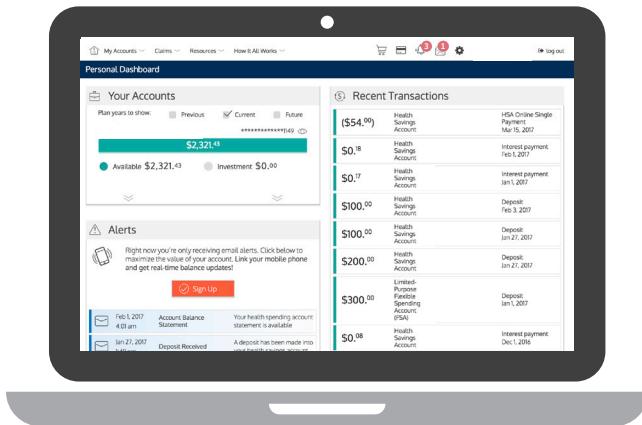
## Start at [anthem.com/ca](http://anthem.com/ca)

If you haven't registered at [anthem.com/ca](http://anthem.com/ca) yet, you'll need to do so. After you log in, you'll see an overview of your health plan. Under the *Menu* tab, select *Spending Accounts*, and you'll find your current balance here. Next, select the specific account and choose **Manage your account** to see more details. This takes you to your spending account dashboard.



## Want to use the app?

Search for the **Anthem** mobile app at the App Store® or Google Play™ and download it. Log in and go to your spending account screen to manage your funds and account at your fingertips.



## Your account dashboard

This page gives you a summary of your spending account, including your current balance. You'll also see recent alerts and transactions, with dates and status information.

Along the top left of your dashboard page, you'll see four options: My Accounts, Claims, Resources and How It All Works. Each one has a drop-down list of tasks you can choose from.



## My Accounts

This is your account details page, where you can:

- Check your benefit account summary.
- Review your recent transactions.
- Pay your doctor, hospital or other health care provider.
- Reimburse yourself for a payment you made out of your own pocket.

From the drop-down list under **My Account**, choose **Benefit Account Summary**. You'll see a box for each of your accounts, with some of these options at the bottom:

- View Details — Includes your specific account details and important information about your spending account.
- Contributions\* — Includes any HSA deposits and contributions from your employer and yourself, as well as the bank accounts you're using for funding your HSA.
- Transactions — Lists all your transactions, such as deposits, claims and expenses paid out of your accounts.
- Investment\* — Allows you to invest your HSA dollars when you have more than \$1,000 in your account.
- Bill Pay\* — Lets you pay for health care services you've received.
- Submit Claim — Lets you request reimbursement for eligible health care expenses.

\*Specific to health savings accounts.

## Claims

This is an important section where you can:

- **Check all your claims activity**, including the status.
  1. Under *Claims*, choose **Claim Activity**.
  2. Your claims will be listed here, plus the amount, date of service and status of each claim.
  3. To sort the claims according to status, point your cursor over *Select here* and choose from the drop-down list: Action Needed, Approved/Paid/Submitted or Denied.
  4. Select a claim to see more details, such as the provider or tracking number. Choose **Add Receipt** if it's needed for a claim.
- **Add a claim or request reimbursement**. These are reimbursement requests for costs when you receive eligible services or products.
  1. Under *Claims*, choose **Claim Activity**.
  2. Select **Submit Claim** on the top right.
  3. If you have more than one spending account, choose the account you want to use to pay for the claim.
  4. Complete the form. Here's some help on the terms:
    -  Claimant – Who's requesting the claim.
    -  Reimbursement Method – How you'll receive the reimbursement (check or deposit).
    -  Service Start/End Date – What time span the reimbursement request covers.
    -  Service Type – Choose the option that best describes the service you're requesting for reimbursement.
    -  Claim Amount – How much you're requesting to be reimbursed.
    -  Pay Provider? – Choose **Yes** to have the reimbursement funds sent directly to your doctor or other providers. If you want the funds sent directly to you, choose **No**. If you pay a provider, choose your provider name from the drop-down menu. If you don't see your provider listed, select **Add new provider record** to add your provider.
  5. Upload a receipt image if you have one. Select **Browse** on the bottom right to find the file, or drag and drop it from your computer into the box.
  6. Choose **Submit**.
- **Add an expense**. These are costs you may have paid out of pocket for eligible medical, dental and vision expenses. Like claims, these can be submitted for reimbursement. You may add these expenses immediately or later.
  1. Under *Claims*, choose **Claim Activity**.
  2. Select **Add Expense** on the top right.
  3. Complete the form.
  4. Upload a receipt image for this claim if you have one. Select **Browse** on the bottom right to find the file, or drag and drop it from your computer into the box.
  5. Choose **Submit**.

## Resources

Choose this section to:

- Read important announcements about your spending account.
- Download or view important forms, such as:
  - Claims
  - Disclosures
  - Account maintenance
  - IRS resources



## How It All Works

Check out this section to learn more about how your spending account works. Get tips, watch a video or use a calculator to help you understand your account. You can get details, such as:

- Who contributes to the account and how much
- How you benefit from the account
- How to use the account
- What expenses your funds can pay for

### Quick links on your account dashboard

On the top right of your dashboard, you'll see icons that connect you to more helpful information.



Here's how you can use them:

-  To report if your debit card is lost or stolen and you need a new one.
-  To review your recent alerts about your account.
-  To read your messages, most of which ask you to take action.
-  To let us know how you'd like us to communicate with you.

### Need a little help?

We're here for you. If you have any questions, just send us an email through the Message Center at [anthem.com/ca](http://anthem.com/ca). Or call us at the Member Services number on your ID card.



## Got an HSA? Great, because this page is specific to your health savings account.

To make contributions to your HSA, you must first add a bank account where your funds will come from.

### Add a bank account

1. From the **My Accounts** tab, choose **Benefit Account Summary**. Then, select **Contributions**.
2. Select **Add Bank Account**.
3. A pop-up box opens so you can enter information about your bank account.
4. Choose **Submit**. A quick validation follows, with two small credits and a debit applied to your bank account.
5. Check your bank account for these transactions and note the amounts.
6. Go back to your HSA page. Choose the bank account you've added and select **Validate Account**.
7. A pop-up box opens. Enter the transaction amounts applied to your bank account and choose **Submit**. You can now contribute to your HSA from your bank account.

### Make a contribution

1. From the **My Accounts** tab, choose **Benefit Account Summary**.
2. Choose **Contributions** and select **Add Contribution**.
3. A pop-up box opens. Enter the date and contribution amount, and choose the bank account from the drop-down list.
4. Choose **Submit**. Your contribution immediately appears on the *Transactions* page.

Note: You may only contribute up to the maximum amount allowed by the IRS for the plan year. Check your contribution limit before contributing.

### Save on fees and trees – choose eStatements

You can enroll in electronic statements and save on fees for paper statements – and save some trees, too! Here's what you do:

1. From the top of your spending accounts dashboard, select **Statements** (if you don't see this message, you are already enrolled in electronic statements and don't have to go any further).
2. Open the **Sample PDF File** and find the PDF PIN code.
3. Enter the code into the **PDF PIN Number** box and select **Submit**.

That's it. No fees, no paper – you'll just get electronic statements for your HSA.

