

Member portal enhancements

HealthEquity member portal

Welcome to the new HealthEquity member portal. The new home page dashboard and navigation provide an innovative, intuitive and user-friendly interface for easy account management.

What's new?

> Dashboard widgets

Bringing the most important account information to the home page dashboard allows for a more efficient user experience. Your widgets are individually customized based on your specific account configuration.

> Intuitive navigation

While basic functionality of the member portal remains the same, the navigation menu has been simplified to improve the user experience with easy-to-use tabs:

- My Account
- Claims & Payments
- Docs & Forms
- Resources

> Responsive display design

Customized to all viewing devices, the HealthEquity member portal is optimized for desktop, laptop, tablet, and mobile access. Including an ever-present navigation bar, your tabs and other helpful features remain visible as you scroll. Your HealthEquity account goes wherever you go.



sample screenshots

HealthEquity[®]
Building Health Savings[™]

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New dashboard features

The screenshot shows a member dashboard with the following sections and callouts:

- My Account:** Helpful tools and information to manage your account.
- Claims & Payments:** Easy claims, payments, and documentation management.
- Docs & Forms:** Contains account forms, and tax documents.
- Contact Us:** Personalized contact information.
- Message Center:** Important reminders and updates from HealthEquity.
- Account Balances:** View all account balances here.
- Quick Links:** One-click access to the most common account actions.
- Plan Details:** Balances and plan details located here for your applicable reimbursement accounts.
- Showcase:** Highlights important information and learning opportunities.
- To Do List:** Suggested action items.
- Resources:** Tools and resources to maximize health savings and overall wellness.

sample screenshot

Where can I find...?

My profile

- My Account > Profile > Profile Details

Monthly statements and tax forms

- My Account > Statements & Tax Forms > View Statements
- Docs & Forms > Tax Forms

Investments

- My Account > Investments

Beneficiaries/dependents

- My Account > Add Individuals > Beneficiaries or Dependents

Reimbursement account detail

- My Account > FSA or HRA > Account Detail

My claims

- Claims & Payments > View All Claims

Pay provider

- Claims & Payments > Pay Doctor/Provider

Reimburse me

- Claims & Payments > Request Reimbursement

Documentation library

- Claims & Payments > View Receipts/Documentation