

Align Smart-Choice Accounts

NEXT STEPS:

YOUR GUIDE TO KEY ACTIONS YOU'LL NEED TO TAKE AFTER THE TRANSITION

Checklist

Have you:

- ✓ [Downloaded the Smart-Choice Mobile App?](#)
- ✓ [Set up Direct Deposit?](#)
- ✓ [Established your Communication Preferences?](#)
- ✓ [Requested Dependent Cards?](#)

Download the Smart-Choice Mobile App

How to Download the App

Apple Devices

To download the Smart-Choice Mobile app on your Apple (iOS) mobile device, follow these steps:

1. If you haven't done so already, establish an Apple Store account.
2. From your Apple device, tap the App Store button and search for "Smart-Choice Mobile." This app is available at no cost to you.
3. Select and install the app. You may be prompted to log in to your Apple Store account in the process.
4. Once successfully installed, the Smart-Choice Mobile app icon will appear on your Apple device's home screen.
5. Tap the icon to open the app.

Android Devices

To download the Smart-Choice Mobile app on your Android mobile device, follow these steps:

1. If you haven't done so already, establish a Google Play account.
2. From your Android device, tap the Play Store button and search for "Smart-Choice Mobile." This app is available at no cost to you.
3. Select the app. To install the app, tap the Download button.
4. Tap Accept & Download to accept the permissions for the app. The app will begin downloading immediately.
5. Once successfully installed, the Smart-Choice Mobile app icon will appear on your Android device's home screen.
6. Tap the icon to open the app.

How to log in to the Smart-Choice Mobile App

After downloading and opening the application, the login screen will provide two options, 'Log In' or 'Sign up'. Please note, you will not use the same credentials you typically use to access your account through the benefits website. The mobile application will use its own unique credentials.

- If you already have a Smart-Choice Mobile username, enter it and tap 'Sign In'. You may be asked some security questions, and then you will be prompted to enter your password.
- If needed, you can retrieve a forgotten username from the sign in screen and reset a forgotten password from the password entry screen.
- If this is your first-time logging in to the Smart-Choice Mobile app, you must register before you can access the application.

How to register (if logging in for the first time)

Tap the 'Sign Up' button.

Begin the registration process by entering your first name, last name, and zip code. This should match the information on file with your employer. If you have a Smart-Choice debit card, check the option to enter the card number to identify yourself. If you do not have a debit card, or your card number is not available, leave this option unchecked. Tap 'continue'.

The image shows the login and sign up interface of the Smart-Choice Accounts mobile app. At the top, the 'alight Smart-Choice Accounts™' logo is displayed. Below the logo, there are two input fields: 'Enter your User ID' and 'Enter your Password'. A 'Save User ID' toggle switch is located to the right of the password field. A large 'LOG IN' button is centered below the input fields. Below the 'LOG IN' button, there are two links: 'Forgot User ID' and 'Forgot Password'. At the bottom of the screen, there is a 'SIGN UP' button.

The image shows the first step of the registration process. The screen displays a welcome message: 'Hi! Welcome to your benefits account!'. Below the message, there are three input fields: 'First Name' (Jack), 'Last Name' (Jackson), and 'Zip Code' (33763). A note at the bottom states: 'If you were issued a debit card, check this box. You'll be asked to provide your card number to verify you. If you don't have a card, leave this box unchecked and we'll book you in another way.' A 'CONTINUE' button is at the bottom.

The image shows the second step of the registration process. The screen displays a message: 'Great to meet you, Jack! Enter a User ID and a password to get started.' Below the message, there are three input fields: 'Email' (jackson@alightus.com), 'Create User ID' (jackson1), and 'Create Password'. A 'Confirm Password' field is also present. A 'CONTINUE' button is at the bottom.

The image shows the third step of the registration process. The screen displays a message: 'Secure your account! Select 4 security questions.' Below the message, there are four dropdown menus for security questions: 'In which city was your grandmother born (father's mother)?', 'What was the name of the town your grandmother lived in? (Enter full name of town only)', 'What is the name of the college you went to?', and 'What was the name of your first girlfriend/boyfriend?'. A 'CONTINUE' button is at the bottom.

The app will attempt to securely identify you. If it is unable to do this with the information you provided, you will be given the option to receive a one-time confirmation code at the email address or phone number on your account. Enter this code on the app screen to continuing the registration process. If you do not have an email address or phone number on file for your account, you will be prompted to enter your employer ID and employee ID. Your employee ID may be obtained from your employer. As an alternative, access your account from your benefits website.

Next, you will be prompted to create a User ID and password. Enter the password once to create it and again to verify it, using the guidelines presented on the app. Then tap 'continue'.

The last step is to secure your account by selecting and answering four security questions. Tap 'continue' to confirm your information has been entered accurately and complete the registration process.

Biometric Verification

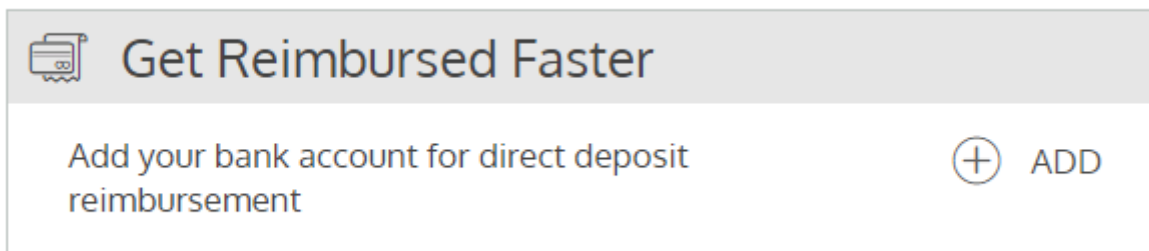
If your device uses biometric verification you can opt to enable this functionality to access Smart-Choice Mobile. Simply choose to save your user ID on the log in screen, and after signing in, you will be presented with the option to enable touch/face recognition access. You can view your touch/face recognition access status and disable it at any time via the 'settings' screen.

Set Up Direct Deposit

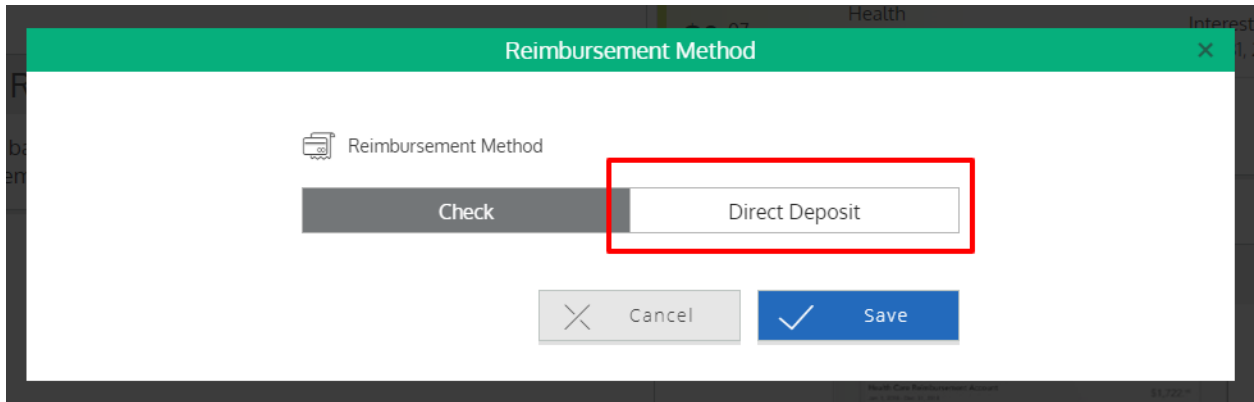
Verify and sign up for direct deposit to ensure quick and timely reimbursements. There are two ways to add or update your direct deposit information on the website.

How to Add Direct Deposit through the “Get Reimbursed Faster” Widget (if adding direct deposit for the first time)

On the home page of the Smart-Choice Accounts website, scroll down to find the “Get Reimbursement Faster” widget.

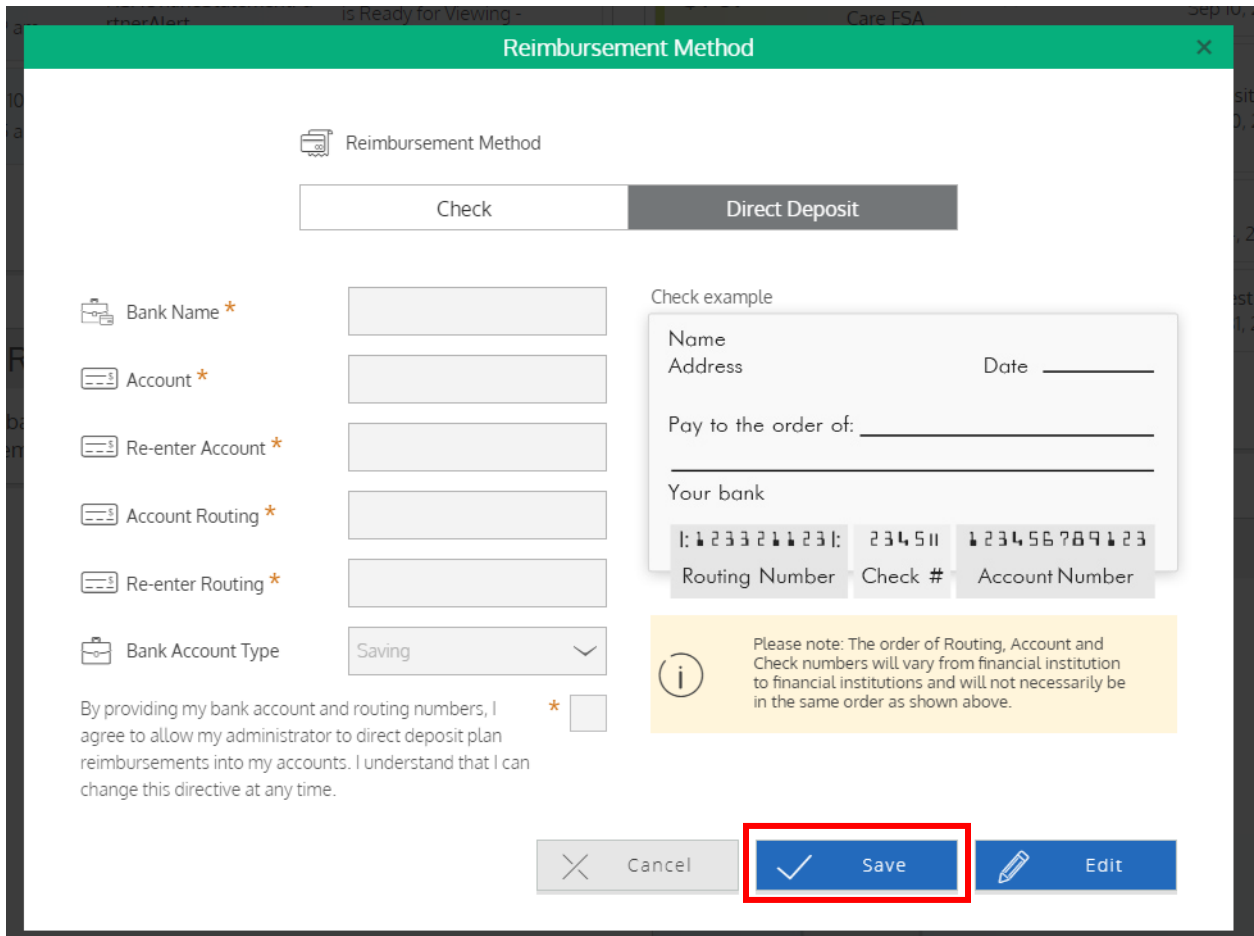


Click the “ADD” button. In the pop-up box that appears, click “Direct Deposit.”



For your account protection, you will be sent a one- time confirmation code via email or text message. Once you provide the confirmation code, you will be able to proceed with updating your direct deposit information.

Enter the details of the bank account to which you want reimbursed funds to deposit. When finished, click "Save." You can always edit the bank information you've entered at a later date by visiting your profile.

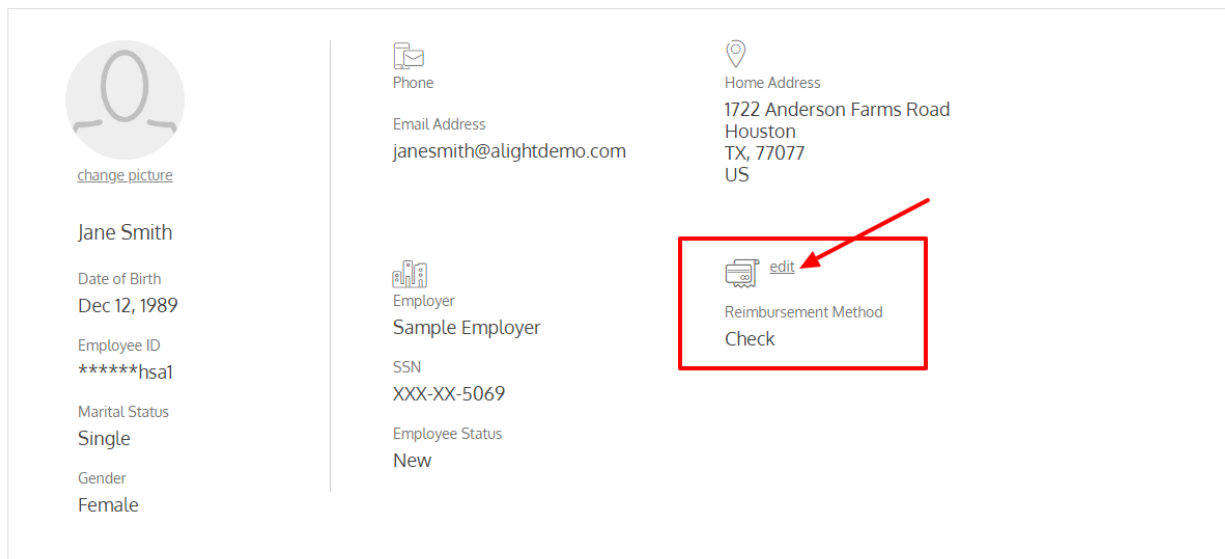


How to Add or Edit Direct Deposit through Your Profile (if added previously)

From the home page of the Smart-Choice Accounts website, hover over your name in the upper right corner and choose “Profile” in the drop-down menu. This will take you to your profile page.



On the profile page, you will see your current reimbursement method listed. To add direct deposit for the first time or to edit your current direct deposit details, click “Edit.”



Establish Your Communication Preferences

From the homepage of the Smart-Choice Accounts website, hover over your name on the top right-hand corner and choose “Communications Settings”. This will take you to the Communications Preferences page.







On the Communications Preferences page, select your preferred method(s) for receiving account-related communications, including mobile delivery, email delivery, or both. Once complete, click “Save.”

Communication Preferences

Marie

Assigned Notifications

The notifications below are available to you. Please define the delivery method for each notification you wish to receive. Please ensure you have an email address and/or registered mobile in order to receive these notifications.



	 mobile	 email	 both	 none
Account Balance Statement This communication is sent on a Monthly basis.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Account Deductible Met This communication is sent when your deductible has been met.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Billing Address Change This communication is sent when your billing address has been updated.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Password Change This communication is sent when your portal password has been updated.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Shipping Address Change This communication is sent when your shipping address has been updated.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
User ID Change This communication is sent when your portal user ID has been updated.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Save

Email Address

sjohnson@alegeus.com

Phone Registration Status

14075551212 Pending  

You will receive a text to the number shown above asking you to complete the registration process. Once registered, your phone's status will show as Registered instead of Pending. If your number remains in Pending status or if you never receive the registration text, please contact support for assistance in resolving the issue. Once registered, text BAL to 97487 to receive your current year account balances. You can opt-out at anytime by texting STOP. For help with text commands, please text HELP to 97487.

Request Dependent Cards

If you would like to request a Smart-Choice card for one of your dependents, you can do so in your online account. There are two ways to order dependent cards on the website.

How to request a card for a new dependent (added for the first time)

If your dependent does not already exist in your account, you will need to add them first. To add a new dependent, hover over your name in the upper right corner of the dashboard of your Smart-Choice Account and choose “Profile” from the drop-down menu. This will take you to your profile page.

Your Accounts

Plan years to show: Previous Current Future

Health Savings Account *****4398

\$4,800.91

Available \$2,300.70 Investment \$2,499.91

Health Care Reimbursement Account (01/01/2021-12/31/2021)

\$2,000.00

Available \$2,000.00 Spent \$0.00

2020 Claim Submission Deadlines Extended
Apr 30, 2021

Recent Activity

\$0.08	Health Savings Account	Posted	Interest payment May 31, 2021
\$0.08	Health Savings Account	Posted	Interest payment Apr 30, 2021
\$0.08	Health Savings Account	Posted	Interest payment Mar 31, 2021

On the profile page, click "Add Family Member."

Family Members

+ Add Family Member

Jones Smith Child

Enter all the applicable information for your dependent, noting that required fields are marked with asterisks. Once all information is entered, click "Next."

Add Family Member

First Name * Jane Last Name * Doe

Initial

General Info Use your primary address

Relationship Child Address 1 * 101 SOUTH-HALL LANE

Date of Birth Jun 16, 2021 Address 2

SSN City * MAITLAND

Gender * Female State * Florida

Full-time student Yes No ZIP * 32751

Phone Country * US

Cancel Next

On the next screen, select the benefit accounts to which you would like to grant your dependent access. Be sure to check the box "Issue Dependent Card" to issue the card. When finished, click "Submit." A new card will be ordered and mailed to your dependent in 7 – 10 business days.

Account	Plan Start Date	Plan End Date	Plan Id	Card Eligible
<input checked="" type="checkbox"/> Health Savings Account	Jan 1, 2018	Dec 31, 2099	HSA	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Health Care Reimbursement Account	Jan 1, 2021	Dec 31, 2021	FSA	<input checked="" type="checkbox"/>

Issue Dependent Card?

Cancel Edit **Submit**

How to request a card for an existing dependent

If your dependent already exists in your account and you need to issue a card only, you can follow these steps.

Hover over your name in the upper right corner of the dashboard of your Smart-Choice Account, then choose "Debit Card(s)" in the drop-down menu. This will allow you to review all debit card information associated with you and your dependents.

Home Marketplace **13** Notifications Hi, EARL EVANS

Your Accounts

Plan years to show: Previous Current Future

Health Savings Account *****4398


\$4,800.41

2020 Claim Submission Deadlines Extended
Apr 30, 2021

Recent Activity

On the debit card page, click “Issue Debit Card” for the applicable dependent.

Debit Cards

 **** -7217	New	EARL EVANS	✓ ACTIVATE
Issue Status: Sent	Activation Date:		Report Lost / Stolen
Mailed Date:	Expiration Date: Aug 31, 2025		

Issue new debit card(s) for Family Member(s)

 EVA EVANS	Spouse Or Common Law Spouse	Issue Debit Card
---	-----------------------------	----------------------------------

< Page 1 of 1 >

A validation pop-up box will appear. Click “Issue Card” to issue a card to your dependent.

Issue New Debit Card Confirmation

Are you sure you want to issue new debit card for 'EVA EVANS'?

[✕ Cancel](#) [✓ Issue Card](#)

Finally, you will receive a confirmation of your request. Click “Close” to return to the debit card page, where you will see the information of the card that was issued. A new card will be ordered and will arrive in 7-10 business days.

Success

Debit card for 'EVA EVANS' has been issued successfully!

[✓ Close](#)