

Alight Smart-Choice Accounts

NEXT STEPS:

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

Checklist

Have you:

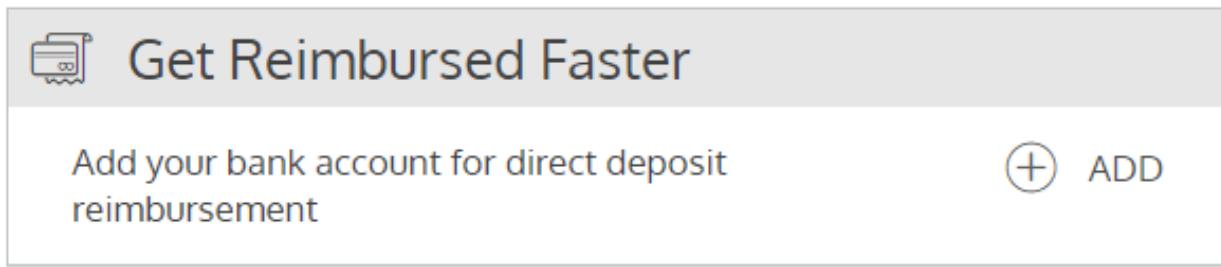
- ✓ [Set up Direct Deposit?](#)
- ✓ [Established your Communication Preferences?](#)
- ✓ [Requested Dependent Cards?](#)

Set Up Direct Deposit

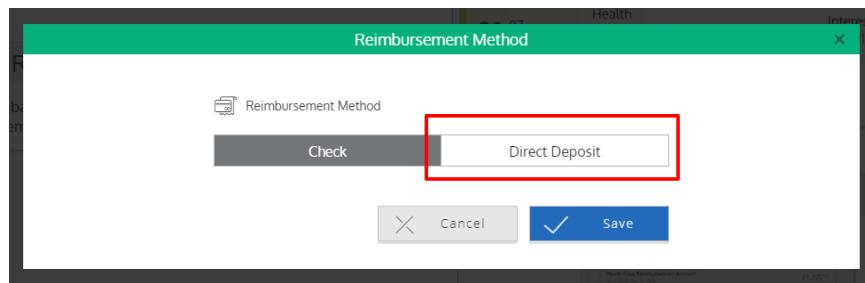
If you already have direct deposit set up for your account, your prior information will transfer to the new site after the transition; there is no action you need to take. However, if you would like to make changes to your direct deposit account or set up direct deposit for the first time, you will need to do so on the benefits website after the transition period ends. 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.”



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.

Reimbursement Method

Check example

Please note: The order of Routing, Account and Check numbers will vary from financial institution to financial institutions and will not necessarily be in the same order as shown above.

Cancel Save Edit

To access this site and add your direct deposit, you must receive a confirmation code to your mobile device. Select the phone number and Generate Code. You will be asked to enter the code on the following screen.

Reimbursement Method

X



Protecting your information is our first priority. In order to access this site or perform this specific function you must receive a confirmation code to the device of your choice. You will be asked to enter the code on the next screen.

Confirmation Code
Delivery Method

Mobile Phone (SMS)

-

CANCEL

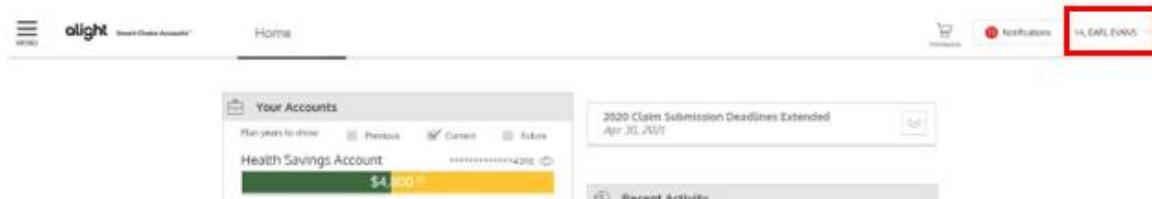
GENERATE CODE



To proceed, please press the generate code button. If you wish to cancel, you will be asked to enter a code the next time you login or try to perform this specific function.

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.”

[change picture](#)

Jane Smith

Date of Birth
Dec 12, 1989

Employee ID
*****hsa1

Marital Status
Single

Gender
Female

Phone

Email Address
janesmith@alightdemo.com

Home Address

1722 Anderson Farms Road
Houston
TX, 77077
US

Employer
Sample Employer

SSN
XXX-XX-5069

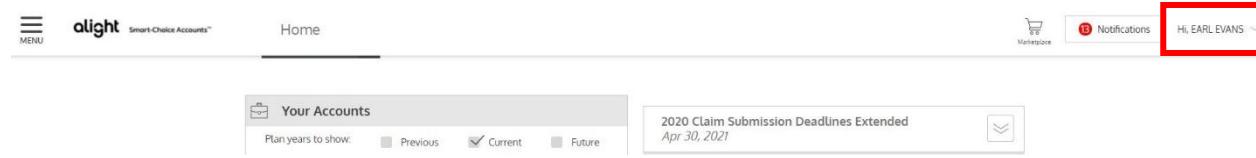
Employee Status
New

Reimbursement Method
Check

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.



The screenshot shows the homepage of the Smart-Choice Accounts website. At the top right, there is a user profile icon with the name "EARL EVANS". Below the profile, there are several links: "Notifications" (which is highlighted with a red box), "Marketplace", and "Hi, EARL EVANS".

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.”

Assigned Notifications

(i) 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
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Account Balance Statement
This communication is sent on a Monthly basis.

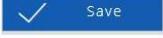
Account Deductible Met
This communication is sent when your deductible has been met.

Billing Address Change
This communication is sent when your billing address has been updated.

Password Change
This communication is sent when your portal password has been updated.

Shipping Address Change
This communication is sent when your shipping address has been updated.

User ID Change
This communication is sent when your portal user ID has been updated.



Email Address
sjohnson@alegeus.com

Phone Registration Status
14075551212 Pending  

(i) 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

\$4,800.61

● 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

Recent Activity

Date	Category	Type	Details
\$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 *	<input type="text" value="Jane"/>	Last Name *	<input type="text" value="Doe"/>
Initial	<input type="text"/>		
General Info		Use your primary address <input checked="" type="checkbox"/>	
Relationship	<input type="text" value="Child"/>	Address 1 *	<input type="text" value="101 SOUTHHALL LANE"/>
Date of Birth	<input type="text" value="Jun 16, 2021"/>	Address 2	<input type="text"/>
SSN	<input type="text"/>	City *	<input type="text" value="MAITLAIND"/>
Gender *	<input type="text" value="Female"/>	State *	<input type="text" value="Florida"/>
Full-time student	<input type="radio"/> Yes <input type="radio"/> No	ZIP *	<input type="text" value="32751"/>
Phone	<input type="text"/>	Country *	<input type="text" value="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 Linking

Please un-check the benefit account(s) that Jane Doe will not have access to.

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"/> Health Care Reimbursement Account	Jan 1, 2021	Dec 31, 2021	FSA	✓

Issue Dependent Card?

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

Notifications

Hi, EARL EVANS

Your Accounts

Plan years to show: Previous Current Future

Health Savings Account ****4398
 \$4,800.61

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:

Mailed Date:

Expiration Date: Aug 31, 2025

Report Lost / Stolen

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