

Guide to Claims Sync

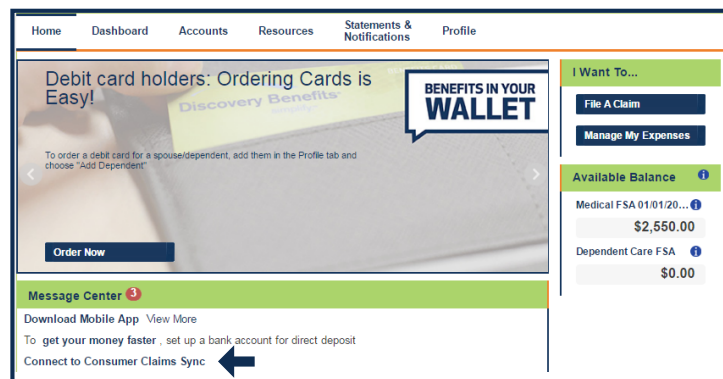
**ALL YOUR
CLAIMS IN
ONE PLACE**



This document provides a step-by-step walkthrough of our Consumer Claims Sync feature. You can also view an interactive demo of our Consumer Claims Sync feature by going to www.DiscoveryBenefits.com/claimssync.

Step 1: Access your consumer portal by going to www.DiscoveryBenefits.com and click the “Login” button in the upper right-hand corner of the screen.

Step 2: Once you’re logged in, scroll to the Message Center on your Home Page and click “Connect to Consumer Claims Sync.” This will bring you to a new page where you can confirm your settings. You can also connect to Consumer Claims Sync by clicking on the Tools & Support Tab and Connect to Consumer Claims Sync under “How do I?”.

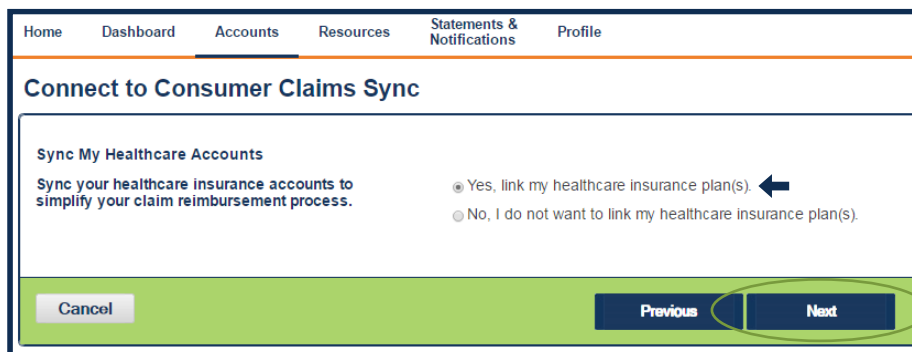


Step 3: A new window will appear titled “Connect to Consumer Claims Sync.” Select “Yes, sync my healthcare claim data” and click “Next” to get to the next page.

The screenshot shows the 'Connect to Consumer Claims Sync' form. It has a title bar with navigation links (Home, Dashboard, Accounts, Resources, Statements & Notifications, Profile). The main content area has the title 'Connect to Consumer Claims Sync' and a sub-header 'Connect to Consumer Claims Sync'. Below this is a message: 'I want to sync my healthcare claim data to my account(s).'. There are two radio button options: 'Yes, sync my healthcare claim data' (selected) and 'No, I do not want to sync my healthcare claim data'. At the bottom, there are 'Cancel' and 'Next' buttons. The 'Next' button is circled in green.

Guide to Claims Sync, continued

Step 4: From this screen, select the “Yes, link my healthcare insurance plan(s)” option to begin syncing a carrier account and click “Next” again. Then, follow the prompts through the rest of the screens until you reach the Overview screen shown in Step 5.



Home Dashboard Accounts Resources Statements & Notifications Profile

Connect to Consumer Claims Sync

Sync My Healthcare Accounts

Sync your healthcare insurance accounts to simplify your claim reimbursement process.

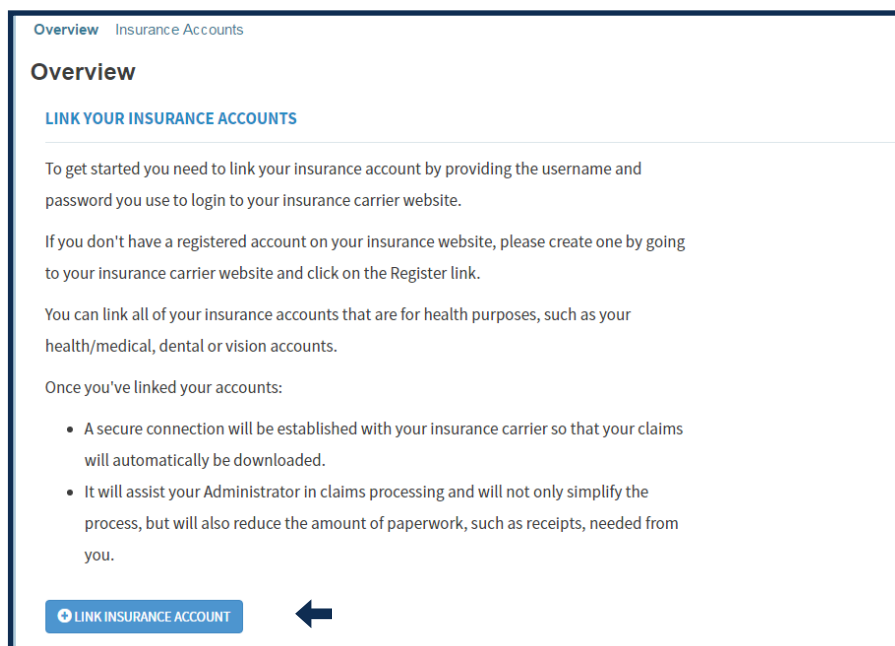
☒ Yes, link my healthcare insurance plan(s). ←

☐ No, I do not want to link my healthcare insurance plan(s).

Cancel Previous **Next**

Step 5: You will be redirected to a separate page where you can sync your insurance accounts. From this page, click the “Link Insurance Account” button and enter the required information. Once you’ve entered in your insurance login information, you’ll see a screen that shows a connection is being established between your portal and your insurance carrier. Typically, this process takes just a few minutes; however, it can take up to 30 minutes, so do not hit refresh.

Note: If you need any help remembering your login credentials for the carrier’s site, or if you have not yet registered on the carrier’s site, you’ll need to work with your insurance carrier to reset or register your username and password.



Overview Insurance Accounts

Overview

LINK YOUR INSURANCE ACCOUNTS

To get started you need to link your insurance account by providing the username and password you use to login to your insurance carrier website.

If you don't have a registered account on your insurance website, please create one by going to your insurance carrier website and click on the Register link.

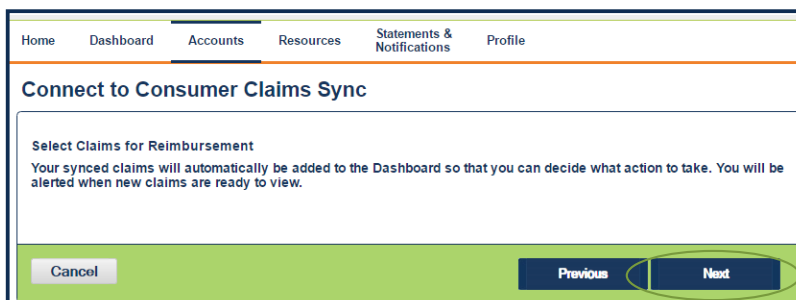
You can link all of your insurance accounts that are for health purposes, such as your health/medical, dental or vision accounts.

Once you've linked your accounts:

- A secure connection will be established with your insurance carrier so that your claims will automatically be downloaded.
- It will assist your Administrator in claims processing and will not only simplify the process, but will also reduce the amount of paperwork, such as receipts, needed from you.

LINK INSURANCE ACCOUNT ←

Step 6: As soon as your Discovery Benefits account is synced with your insurance carrier, your claims will sync to your dashboard and you will be able to select claims for reimbursement.



Home Dashboard Accounts Resources Statements & Notifications Profile

Connect to Consumer Claims Sync

Select Claims for Reimbursement

Your synced claims will automatically be added to the Dashboard so that you can decide what action to take. You will be alerted when new claims are ready to view.

Cancel Previous **Next**

Guide to Claims Sync, continued

Step 7: You'll then be brought to a summary page, where you can see the status of your synced claims. From the bottom of this page, you'll need to check the Terms of Service checkbox and click "Submit" to ensure your settings are saved.

Steps	Status
Connect to Consumer Claim Sync	Linked Update
Sync My Healthcare Accounts	Linked Update
Select Claims for Reimbursement	Off

Healthcare Insurance Plans Terms and Conditions ▼

☐ I have read, understand, and agree to the Terms and Conditions

Cancel Submit

Once this step is complete, claim information from your carrier's website will now flow directly into your consumer portal dashboard when new activity becomes available. Each time new claim data syncs, you'll get a notification in the Message Center of your portal. You can either click on this notification or go to the Dashboard tab at the top of the page to access the new claim information. To modify your settings after setup is complete, you can click on the Resources Tab. To modify your setting after setup is complete, you can click on the Tools & Support tab and select Manage Claims Sync Data under 'How do I?'.

If you have questions on how Consumer Claims Sync works or if you need help syncing an insurance carrier, feel free to reach out to our Participant Services team by calling 866-451-3399, emailing customerservice@discoverybenefits.com or starting an online chat at www.DiscoveryBenefits.com.