

# ACCOUNT ACCESS

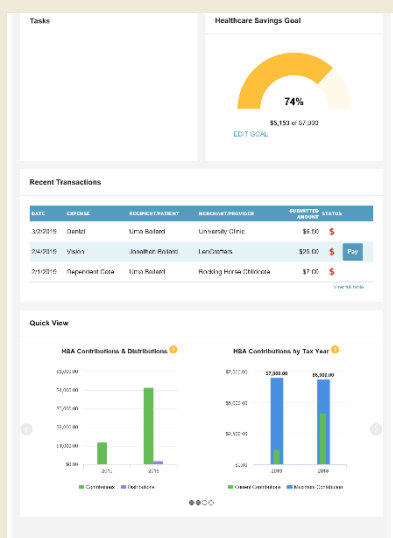


## HEALTH BENEFITS

1. Go to **alerusrb.com**, click **Log in**, select **My Alerus**, then click **Go**.
2. The first time you log in, you will need to create an account. Click **Sign Up** or **Create Account**. You will need your Social Security number and date of birth. You will also need one of the following:
  - Hire date
  - Alerus health and benefits debit card number
3. Next, you will be presented with an electronic consent form and terms and conditions. Review and click **Accept**.
4. On the next screen, select a phone number and your preferred method of authentication (text or call). Review and click **Submit**.
5. Enter the six-digit code sent via text or call and click **Submit**.
6. From the My Alerus dashboard, select your HSA, HRA, or FSA plan under Accounts and click the **My Account** link on the right side of the page.

### HOME PAGE

- The **I Want To...** section has the most frequently used features, like **File a Claim**.
- **Accounts** lists your available balance.
- **Tasks** displays alerts and relevant links related to your accounts.
- **Healthcare Savings Goals** displays progress toward your HSA goals (if applicable).
- **Recent Transactions** lists your latest expenses and their status (if applicable).
- The **Quick View** section displays key account information



### ACCOUNTS

The **Accounts** tab provides access to additional sections of the site depending on your account features:

#### Accounts

- Account Summary
- Account Activity
- Expense Tracker
- Claims
- Payments
- Statements

#### Investments

- Investments
- Education
- Manage Investments
- Portfolio Performance
- Balance History
- Fund Activity
- Transaction Details

#### Profile

- Profile Summary
- Banking/Cards
- Payment Method
- Login Information

### TOOLS & SUPPORT

- **Documents & Forms** provides:

- Forms
- Plan Summaries
- Rules & Agreements

- **How Do I?** allows you to access common features like depending on your account:

- Change Payment Method
- Update Notification Preferences
- Download Mobile App\*
- Update HSA Coverage Level
- View Interest Information
- View Fee Schedule
- Update Healthcare Savings Goal
- Report Card Lost/Stolen

- **Contact Us** provides multiple methods of contacting Alerus for assistance with your account.

### MESSAGE CENTER

- View Current Messages
- Update Notification Preferences
- View Statements



### FOR MORE INFORMATION

#### Client Service Center

877.661.4727

healthbenefits@alerus.com

\* Alerus charges no fees to download or use the app. However, your carrier's message and data rates may apply. This information is provided for informational and discussion purposes only.

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