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Getting started with your online account

Use your online account to manage the plans you're enrolled in and so much more. To watch a video tutorial, click here. 

Navigating your online account

Home tab: Check your available balance, get information on new features or tools, or review any actions needed in the Tasks section.

Accounts tab: Review your account summary and claim details as well as locate account statements, look at payment history information, and election/plan description details. Access real-time data about recent healthcare expenses in the Dashboard section. Also view non-healthcare expenses in the Dashboard section by clicking "View Non-Healthcare." If you're enrolled in a health savings account (HSA), you can make investment selections here as well.

Profile menu: Review personal demographic information, add dependents, authorized representatives and direct deposit information, order additional or replacement WEX benefits card (if allowed by your plan design) and update login information. See How to add an authorized representative in your online account and How to order a new or replacement WEX benefits card for instructions. You can access this menu from the Accounts tab.

Videos & Forms tab: Find videos, forms, and links applicable to your account.

Message Center tab: Locate account statements, receipt reminders, advices of deposit, and HSA tax documents, if applicable. You can also update your notification preferences to opt in or out of certain text and email alerts. See How to set up text message alerts for instructions.

I Want To menu: Access quick buttons for common tasks, including filing a claim and managing expenses and investments, if applicable, and get answers to your questions. You can access this menu from the Home tab, Accounts tab, and Videos & Forms tab in your online account.

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