Mercer Participant Notifications

Notification	Description	Sent Via
Notional Account Notifications		
60 day account statement	Mailed letter sent to participants with no email address on file who have a remaining balance in their FSA/DCA plan 60 days prior to the end of their plan year.	Mailed Letter
Account statement notification	Notifies consumer that their account statement is ready to view on their online account. Redirect to online account to find statement. Sent monthly to all active account holders.	Email
Advice of deposit notification	Notifies consumers that money has been deposited into their bank account. Sent after a claim reimbursement has been approved.	Email
Claim confirmation - Text Alert	Sends confirmation that a claim was submitted.	Text Alert
Claim confirmation notification	Sends confirmation that a claim was submitted.	Email
Debit card has been mailed - Text Alert	Text alert sent when a debit card has been mailed.	Text Alert
Debit card mailed notification	Notifies a consumer that a new card has been mailed. Is sent when a new or additional debit card is requested and then mailed. WEX allows the consumer to opt-in to this notification.	Email
Debit card purchase - Text Alert	Sent when a purchase was made using the debit card. WEX allows the consumer to opt-in to this notification.	Text Alert
Debit card purchase notification	Sent when a purchase was made using the debit card. WEX allows the consumer to opt-in to this notification.	Email
Deductible met notification	The deductible has been met and the debit card is now active. This notification is only sent to consumers enrolled in an HRA plan with a debit card that will not be activated until the deductible is met.	Email
Denial letter - Text Alert	A claim was denied. This serves as notification of denial redirecting the consumer into their online account.	Text Alert
Denial letter notification	Notifies the consumer that a claim that was submitted was denied. This serves as notification of denial redirecting the consumer into their online account.	Email
Denial letter with repayment letter	If no email address on file a denial letter is mailed notifying the consumer that a claim purchased using the debit card has been denied (including the denial reason) and repayment is needed.	Mailed Letter
Denial letter with repayment notification	Notifies the consumer that a claim purchased using the debit card has been denied and repayment is needed.	Email
Denial letter with repayment - Text Alert	A claim purchased using the debit card was denied. This serves as notification of denial redirecting the consumer into their online account.	Text Alert
Final Filing Date and Remaining Balance	Notifies the participant of their final filing date, last date to incur expenses and their remaining balance. This email will be generated 30 days prior to their final filing date. Consumers who have a $0 remaining balance will not receive this email.	Email
Payment issued notification	A payment will be issued for a claim reimbursement via direct deposit.	Email
Payment issued - Text Alert	When a payment is being made to the consumer from their FSA, DCA, HRA or Commuter account.	Text Alert
Receipt reminder - Text Alert	A receipt is required to process a claim.	Text Alert
Receipt reminder notification	A receipt is required to process a claim that was made using the debit card.	Email
Receipt reminder (Debit card) - Day 1 letter	If no email address on file a receipt reminder is mailed notifying the consumer that a receipt is required to process a claim.	Mailed Letter
Receipt reminder (Debit card) - Day 30 letter	If no email address on file a receipt reminder is mailed notifying the consumer that a receipt is required to process a claim. This is the second reminder if no action has been taken.	Mailed Letter
Receipt reminder (Debit card) - Day 72 letter	If no email address on file a receipt reminder is mailed notifying the consumer that a receipt is required to process a claim. This is the third and final reminder.	Mailed Letter

Recurring claim notification	When a recurring reimbursement has been set up for an account	Email
Repayment processed notification	When an EFT repayment has been processed on the consumer's account.	Email
Invalid incoming check notification	Returned with a check if the check is missing the endorsement, payee, signature or the written amount. The letter is returned with the original check.	Mailed Letter
Online Account Notifications		
Locked account notification	A new password was requested and the consumer's account was locked and a password could not be reset.	Email
Bank account activation	Notifies a consumer that their banking information was updated in their online account. The email provides details on how to validate their bank account so that direct deposit for their account can be activated.	Email
Email address change notification to new address	Notifies consumers that their email changed to a new email address.	Email
Email address change notification to old address	Notifies consumers that their email changed to an old address.	Email
One-time password email notification	Sent when a consumer is attempting to login to their online account, has forgotten their password and requests a one-time password sent to their email address on file.	Email
Red flag notifications	Personal information on a consumer accounts was updated including: address, home phone, email address, username, password or bank account information.	Email
Reset account username notification	Sent when a consumer has changed their username within their consumer online account.	Email
Welcome email	After initial enrollment is received a welcome email is sent to welcome them to WEX and suggest they login to their online account.	Email
HSA Specific Account Notifications		
HSA account closure notification	Notifies consumers that their HSA has been closed. The report includes fund distribution detail in a letter attachment.	Email
HSA account summary notification	Notifies consumers that an HSA Account Summary is available. Provided monthly. Redirects the consumer to their online account.	Email
HSA account summary- Text Alert	An HSA account summary is available. Provided monthly. Redirects the consumer to their online account.	Text Alert
HSA action required notification	Sent to an HSA account holder that has not logged into their online account to accept the terms & conditions of the HSA account.	Email
HSA advice of deposit notification	Notifies HSA consumers that money has been deposited into their bank account.	Email
HSA cash balance - Text Alert	Notifies consumers that the HSA available balance has dropped below the amount previously defined by the consumer. This is an opt-in notification so consumers will receive this notification only if they opt in to this notification on their platform.	Text Alert
HSA cash balance notification	Notifies consumers that the HSA available balance has dropped below the amount previously defined by the consumer. This is an opt-in notification so consumers will receive this notification only if they opt in to this notification on their platform. Includes the threshold amount.	Email
HSA contribution near maximum - Text Alert	HSA contributions-to-date for the tax year meet the consumer defined threshold for the notification.	Text Alert
HSA contribution near maximum notification	Notification sent when a consumer's HSA contributions-to-date for the tax year exceed the IRS maximum, minus the consumer defined threshold. The tax year is either the current tax year or the prior tax year if the current date is earlier than 4/15.	Email

HSA contribution notification	A contribution has been posted to the HSA cash account since the last email alert. (Adjustments, interest, investments, and debit card refunds are not considered contributions and will not trigger email alerts. Contributions that are on hold, canceled, failed, or pending will not trigger email alerts.) One email will be sent for all contributions posted since the last email alert. When the feature is enabled, for the first run, the notification includes only contributions from the previous day.	Email
HSA contribution - text alert	Confirmation that a contribution has been made to the consumer's HSA account.	Text Alert
HSA excess contribution notification	An excess contribution or an over contribution has occurred. An excess contribution is when HSA contributions for a tax year exceed the IRS regulatory maximum based on coverage level and age. An over contribution is when HSA contributions exceed the IRS statutory maximum for family coverage plus the catch-up contribution. You can customize the notification text for both an excess contribution and an over contribution. Unlike excess contributions, over contributions must be automatically returned to the consumer to ensure that the account maintains its HSA qualification.	Email
HSA IDV - HSA Account on Hold- Letter	When a new HSA account has been put on hold status. When no email address on file, mailed to notify the consumer why it is on hold and ask for additional documentation.	Mailed Letter
HSA IDV - HSA Account on Hold - email notification	When a new HSA account has been put on hold/blocked status. Sent to notify the consumer why it is on hold and ask for additional documentation.	Email
HSA IDV - HSA Documents Approved - email notification	Sent after documentation has been received that has been approved to verify the new HSA account. The HSA account is now active.	Email
HSA IDV - HSA documentation not valid - Letter	Sent to a new HSA consumer after we have received additional documentation to activate their HSA account that is in a hold status due to the IDV. Notifies the HSA consumer that we were unable to validate their account with the information provided. Mailed if no email is on file.	Mailed Letter
HSA IDV - HSA documentation not valid - email notification	Sent to a new HSA consumer after we have received additional documentation to activate their HSA account that is in a hold status due to the IDV. Notifies the HSA consumer that we were unable to validate their account with the information provided. Emailed if email on file.	Email
HSA IDV - HSA account on hold - No reopen	Mailed to an HSA consumer after their account has been put on hold and we have not received additional documentation to validate their account. The letter is to notify them that their account will be closed and they will have to re-enroll in order to establish their HSA.	Mailed Letter
HSA payment issued - text alert	When a payment is being made to the consumer from their HSA account.	Text Alert
HSA payment issued notification	Notifies consumer that a payment will be issued for HSA distributions initiated by the consumer (reimbursed via check)	Email
HSA recurring contribution cancelled notification	Notifies consumer that an HSA recurring contribution was canceled on the consumer's account.	Email
HSA recurring contribution created notification	Notifies consumer that an HSA recurring contribution was created on the consumer's account.	Email
HSA recurring contribution updated notification	Notifies consumer that an HSA recurring contribution was updated on the consumer's account.	Email
HSA tax documents available - text alert	HSA tax documents 1099-SA, 5498-SA, Correction 5498-SA, or Correction 1099-SA are available.	Text Alert
HSA tax documents notification	HSA tax documents 1099-SA, 5498-SA, Correction 5498-SA, or Correction 1099-SA are available.	Email
HSA withdrawal limit notification	An HSA withdrawal from the cash account occurred that exceeds the amount defined by the consumer.	Email
HSA withdrawal maximum exceeded - text alert	An HSA withdrawal from the cash account occurred that exceeds the amount defined by the consumer.	Text Alert