

Authorized / Unauthorized Caller Allowable Information Chart

*Just because a person has a Card on the account does not mean that person is authorized on the account.

Type of Information / Activity	Participant	Authorized*	Unauthorized
Provide the actual account balance amount	Yes	Yes	NO
Provide information that there is an available balance	Yes	Yes	NO
Mechanics of the WageWorks account (processes, procedures, company policies)	Yes	Yes	Yes
Educate about additional resources (website)	Yes	Yes	Yes
Provide PMB claim or CUV denial reason(s) (receipt missing any of 5 required pieces of information, form not signed, etc.)	Yes	Yes	NO
Provide information on how to file a PMB claim or CUV	Yes	Yes	Yes
Discuss specific transactions	Yes	Yes	NO
Change address / phone / email	Yes	NO	NO
Make changes to account	Yes	NO	NO
Provide status of a WW Healthcare Card	Yes	Yes	NO
Provide details on an unauthorized caller's WW Healthcare Card transactions (dates, merchants, etc.)	Yes	Yes	NO
Report WW card lost or stolen	Yes	Yes	Yes
Order new/replacement WW card(s)	Yes	NO	NO
Order additional WW card(s)	Yes	NO	NO
Request sending a form to the mailing address or email address currently on the account	Yes	Yes	Yes
Provide product explanation/benefit features	Yes	Yes	Yes
Submit a case	Yes	Yes	NO
Setup PMP over the phone with CSR	Yes	NO	NO

*Authorized callers are those with full authorization and no restrictions. When a caller is authorized with restrictions, it is the CSR's responsibility to follow the restriction limitations listed in the CRM note.