

CONSUMER PORTAL QUICKSTART GUIDE



Welcome to your CompuSys Inc. Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your **IBEW Local 347 Health and Welfare HRA Account (HRA)**. It enables you to:

- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Update your personal profile information
- Change your password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:

1. Work from sections within the Home Page,
2. Hover over or click on the six tabs at the top.

HOW DO I LOG ON TO HOME PAGE?

1. Go to www.ibew347benefits.com and click on “Health Reimbursement Account”, there you will find a link to the consumer portal.
2. Enter your login ID (first initial, last name, last 4 of social security number, i.e. flastname1234) and password (Compusys) .
3. Click **Login**.

The **Home Page** is easy to navigate:

- Easily access the **Available Balance** and “**I Want To**” sections from the left-hand navigation area.
- The **I Want To**...section contains the most frequently used features for the Consumer Portal.
- In the left-hand column **Available Balance** links to the Account Summary page, where you can see and manage your accounts.
- The **Message Center** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Quick View** section graphically displays some of your key account information.

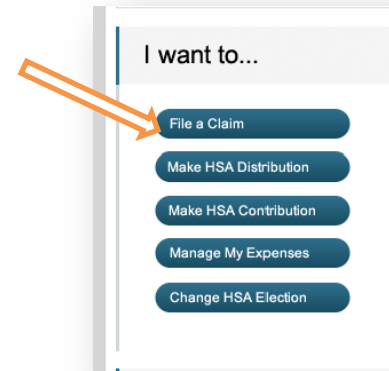
You can also hover over the tabs at the top of the page.

The screenshot shows the user interface of the ibew347benefits.com consumer portal. At the top, it displays the user's name 'April Clarke' and a 'Logout' link. The main navigation bar includes tabs for 'Home', 'Accounts', 'Profile', 'Statements & Notifications', 'Tools & Support', and 'Dashboard'. The left-hand navigation area is titled 'I Want To...' and contains buttons for 'File A Claim', 'Make HSA Distribution', 'Make HSA Contribution', and 'Manage My Expenses'. Below this is the 'Available Balance' section, which lists three accounts: 'Health Savings Ac...' with a balance of \$355.00, 'DCFSA' with \$548.33, and 'LPFSA' with \$2,029.40. The main content area features a 'Welcome!' message with a photo of a man working on a laptop. Below the welcome message is the 'Message Center' with a notification about receipts needed for claims and a 'Next projected payment' of \$75.00. The 'Quick View' section displays two pie charts: 'Paid Claims by Category' showing \$140.75 on Dental and \$72.85 on Vision, and 'Election Summary for 01/01/2014 - 12/31/2014' showing \$2,500.00 to LPFSA and \$2,500.00 to DCFSA. The footer contains contact information for consumer support and copyright notices for Evolution1, Inc. and WEX.

HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select the “I want to... **File a Claim**” button.
OR on the **Home Page**, under the **Accounts** tab, click **File Claims** link.
2. Enter your claim information, and upload the receipt, on the form that appears and click **Add Claim**. The claim is then added to the **Claims Basket**.
3. For submitting more than one claim, click **Add Another Claim**, select the Account Type and complete the form and click **Add Claim**.
4. When all claims are entered in the **Claims Basket**, click **Submit** to send the claims for processing.
5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a receipt, print another **Claim Confirmation Form** to submit to the administrator, attaching the required receipts. **OR** if a receipt is required, you will see the **Upload Receipt** link. Click on it and the **Receipts Needed** screen displays.
6. For each claim that requires a receipt, click **Upload Receipt** on the far right and follow instructions. (Your receipt must be in pdf, jpg, or gif format.)
7. The Receipt Uploaded confirmation appears: “Your receipt has been uploaded. You may upload additional receipts if needed until the claim is approved.”
8. After uploading, you may also click **View Confirmation** and print the form for your records.

NOTE: If you see a **Receipts Needed** link in the Message Center section of your Home Page, click on it. A listing of any **Claims Requiring Receipts** will appear.



HOME	ACCOUNTS	PROFILE	STATEMENTS & NOTIFICATIONS	TOOLS & SUPPORT	DASHBOARD	April Clarke ▾ Last Login: 5/13/2014 - Online Logout	
Receipts Needed							
Receipts Needed							
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status		
LPFSA	5/1/2014	Dr. Sickels	April Clarke	\$46.00	Required	Upload Receipt View Confirmation	
DCFSA	2/1/2014 - 2/28/2014	Mrs. Smith's Daycare	Cindy Clarke	\$290.00	Overdue	Upload Receipt View Confirmation	
Receipts Uploaded and Awaiting Approval							
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status		
LPFSA	1/31/2014	Dr. Dental	April Clarke	\$257.00	Uploaded	Upload Receipt View Confirmation	

HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Available Balance** section.
2. For all Account Activity, on the **Home Page**, click on the **Available Balance** link to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under “Eligible Amount” to view enrollment detail.

Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Plan Year Balance	Available Balance
Health FSA	<u>\$1,100.00</u>	<u>\$185.07</u>	<u>\$108.20</u>	\$16.87	\$60.00	\$974.93	<u>\$974.93</u>
HRA 2013	<u>\$416.66</u>	<u>\$0.00</u>	<u>\$0.00</u>	\$0.00	\$0.00	\$416.66	<u>\$416.66</u>
Incentive Account	<u>\$1,500.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	\$0.00	\$0.00	\$1,500.00	<u>\$50.00</u>

ALL HEALTH CARE EXPENSE ACTIVITY IN ONE PLACE

To view and manage ALL healthcare expense activity from EVERY source, use the **DASHBOARD**

1. On the **Home Page**, under the **Dashboard** tab. The 1View **Dashboard** provides you with an easy-to-use consolidated view of healthcare expenses for ongoing management of medical claims, premiums, and card transactions.
2. Easily filter expenses by clicking on the **filter options** on the navigation pane on the left side of the screen or, by clicking on the **field headers** within the **Dashboard**.
3. You can search for specific expenses using the **search field** on the bottom left side of the screen.
4. Expenses can be exported into an Excel spreadsheet by clicking on the **Export Expenses** button on the upper left side of the page.

The screenshot displays the 1View Dashboard interface. At the top, there are navigation tabs: Home, Accounts, Profile, Statements & Notifications, Tools & Support, and Dashboard (selected). Below the tabs, there are buttons for 'Add Expense' and 'Export Expenses'. The main content area is titled 'Dashboard' and shows a summary of healthcare expenses. It includes a table with columns for 'Expense Summary', 'Total Healthcare Expenses', 'Total Paid Expenses', and 'Total Unpaid Expenses'. Below this, there is a section for 'Total Eligible to Submit' with a value of \$340.89. The main table lists individual expenses with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status. Each row has a 'Pay' button. On the left side, there is a navigation pane with filters for Expense (All Expenses, Medical, Dental, More Options), Status (All Statuses, Unpaid, Ineligible, Pending, Partially Paid, Paid), Date (All Dates, 2014, 2013), Recipient (All Recipients, April Clarke, Cindy Clarke, More Options), and Merchant/Provider (All Merchants/Providers, Dr. Sickels, Dr. Dental, More Options). At the bottom left, there is a search field with a 'Search' button.

HOW DO I ADD AN EXPENSE TO THE DASHBOARD?

1. From the **Dashboard** click on the **Add Expense** button in the upper left side of the page.
2. Complete the expense detail fields. You can even upload a copy of the receipt and, add notes for your records.
3. Once the expense has been added to the **dashboard** you can pay the expense, if desired.

HOW DO I PAY AN EXPENSE?

1. You may process payments/ reimbursements for unpaid expenses directly from the **Dashboard** page.
2. Expenses will be categorized and **payment** can be initiated for unpaid expenses by clicking on the button to the to the right of the expense details.
3. Simply choose which expenses you would like paid and you will presented with the eligible accounts from which you can initiate payment.
4. When you click **Pay**, the claim details from the **Dashboard** will be pre-populated within the claim form. Review & edit the claim details as needed.
5. You will have the option to either request a reimbursement to yourself or, pay the provider.

The screenshot shows the WEX dashboard with the 'Add Expense' button highlighted. The dashboard includes a navigation menu (Home, Accounts, Profile, Statements & Notifications, Tools & Support, Dashboard) and a summary section with the following data:

Expense Summary	Total Healthcare Expenses	Total Paid Expenses	Total Unpaid Exp
	\$1,222.49	\$215.75	\$1,006.74

Below the summary, it shows 'Total Eligible to Submit: \$340.89'. A table of expenses is displayed with columns: Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status.

Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status
05/01/2014	Dental	Cindy Clarke	Dental Services Inc.	\$59.20	Unpaid
05/01/2014	Medical	April Clarke	Dr. Sickels	\$46.00	Unpaid
03/01/2014	Laboratory	April Clarke	LabAmerica	\$67.00	Unpaid
02/15/2014	Medical	April Clarke	Dr. Sickels	\$88.40	Partially Paid
02/14/2014	Dental	April Clarke	-	\$57.69	Unpaid
02/09/2014	Medical	April Clarke	Dr. Dental	\$52.35	Paid
02/01/2014	Vision	April Clarke	-	\$105.00	Unpaid
02/01/2014	Medical	April Clarke	Dr. Sickels	\$72.85	Unpaid
02/01/2014	Medical	Cindy Clarke	Mrs. Smith's Daycare	\$290.00	Unpaid
01/31/2014	Medical	April Clarke	Dr. Dental	\$257.00	Partially Paid
01/20/2014	Dental	April Clarke	-	\$52.00	Unpaid
01/01/2014	Medical	Cindy Clarke	Poppins Day Care	\$75.00	Paid

This close-up view shows the 'Pay' button circled in red for the expense entry: 05/01/2014 Dental, Cindy Clarke, Dental Services Inc., \$59.20, Unpaid.

HOW DO I EDIT AN EXISTING EXPENSE IN THE DASHBOARD?

1. You can edit expense details for all claim statuses directly from the **Dashboard** page.
2. Expand the claim details visible by clicking on the expense line item from the Dashboard.
3. You will be presented with options to add expense notes, update the expense details, mark the expense as paid/unpaid or, remove the expense from the Dashboard.

The screenshot shows the WEX Dashboard interface. At the top, there are navigation tabs: Home, Accounts, Profile, Statements & Notifications, Tools & Support, and Dashboard (which is selected). A 'I Want to...' dropdown menu is visible on the right. Below the navigation, there are two main sections: 'Add Expense' and 'Export Expenses'. The 'Expense' section includes 'All Expenses', 'Dependent Care', 'Medical', and 'More Options'. The 'Status' section includes 'All Statuses', 'Unpaid', 'Ineligible', 'Pending', 'Partially Paid', and 'Paid'. The main content area is titled 'Dashboard' and includes a 'View Non-Healthcare' link. Below this, there is an 'Expense Summary' table with columns for 'Total Healthcare Expenses', 'Total Paid Expenses', and 'Total Unpaid Expenses'. The values are \$857.49, \$140.75, and \$716.74 respectively. Below the summary, there is a 'Total Eligible to Submit' section with a value of \$340.89. The main table lists expenses with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status. A single expense is listed: 05/01/2014, Dental, Cindy Clarke, Dental Services Inc., \$59.20, and Unpaid. Below the table, there is an 'Expense Details' section with fields for Description, Date(s) of Service, Source, Expense Amount, Received Date, and Payable Amount. There are also links for 'Add Expense Note', 'Mark as Paid', 'Remove Expense', and 'Update Expense'.

HOW DO I VIEW MY CDH CLAIMS HISTORY AND STATUS?

1. On the **Home Page**, click on **Available Balance** and then select the Claim amount in the **Submitted Claims** column for the applicable account you would like to view claims history for.
2. For an alternative perspective, you may also view claims history and status for all claim types including dependent care on the **Dashboard**.

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. On the **Home Page**, under the **Accounts** tab, click **Payment History** on the drop-down menu. You will see reimbursement payments made to date.
2. Click **View Detail** on the far right to see claim details.

HOW DO I UPDATE MY PERSONAL PROFILE?

1. On the **Home Page**, under the **Profile** tab, click your choice on the drop-down menu: **Profile, Banking or Login Information**.
2. Click any link on the Profile screen: **Update Profile**. Some profile changes will require you to answer an additional security question.
3. Complete your changes in the form.
4. Click **Submit**.

HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. On the **Home Page**, click on the **Profile** tab, and select **Login Information** on the left-hand side of the screen.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click **Save**.

HOW DO I VIEW OR ACCESS...

...DOCUMENTS & FORMS?

1. On the **Home Page**, use the **Tools & Support** tab.
2. Click any form or document of your choice.

...NOTIFICATIONS?

1. On the **Home Page**, under the **Statements & Notifications** tab, click the **Statements & Notifications** tab.
2. Click any link of your choice. **Receipt Reminders, Account Statements, Advice of Deposits, Denial Letters, or Denial Letters with Repayments** are a few options.

...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts** tab, click **Account Summary** on the drop-down menu.
2. Click the applicable account in the first column on the left and the **Plan Rules** open in another browser **OR** on the **Home Page**, under the **Accounts** tab, click **Plan Descriptions** on the drop-down menu for basic information. Then click each applicable plan to see the Plan Detail screen.

MORE HELPFUL INFORMATION (if enabled by Partner)...

On the **Home Page**, under the **Tools & Support** tab, you may find links that connect you to helpful information supplied by your third party administrator. These may be links to your plan website or to other valuable resources that enable you to manage your healthcare more effectively.