



# CONSUMER PORTAL QUICKSTART GUIDE

## Welcome

### to your **Child Care Providers United (CCPU) Reimbursement Accounts Consumer Portal.**

This one-stop portal gives you 24/7 access to view information and manage your **Reimbursement Accounts**. It enables you to:

- File a reimbursement online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, reimbursement request history and payment history
- Report a lost/stolen Card and request a new one
- Change your login ID and/or password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient.

You can conveniently navigate this site in two ways:

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

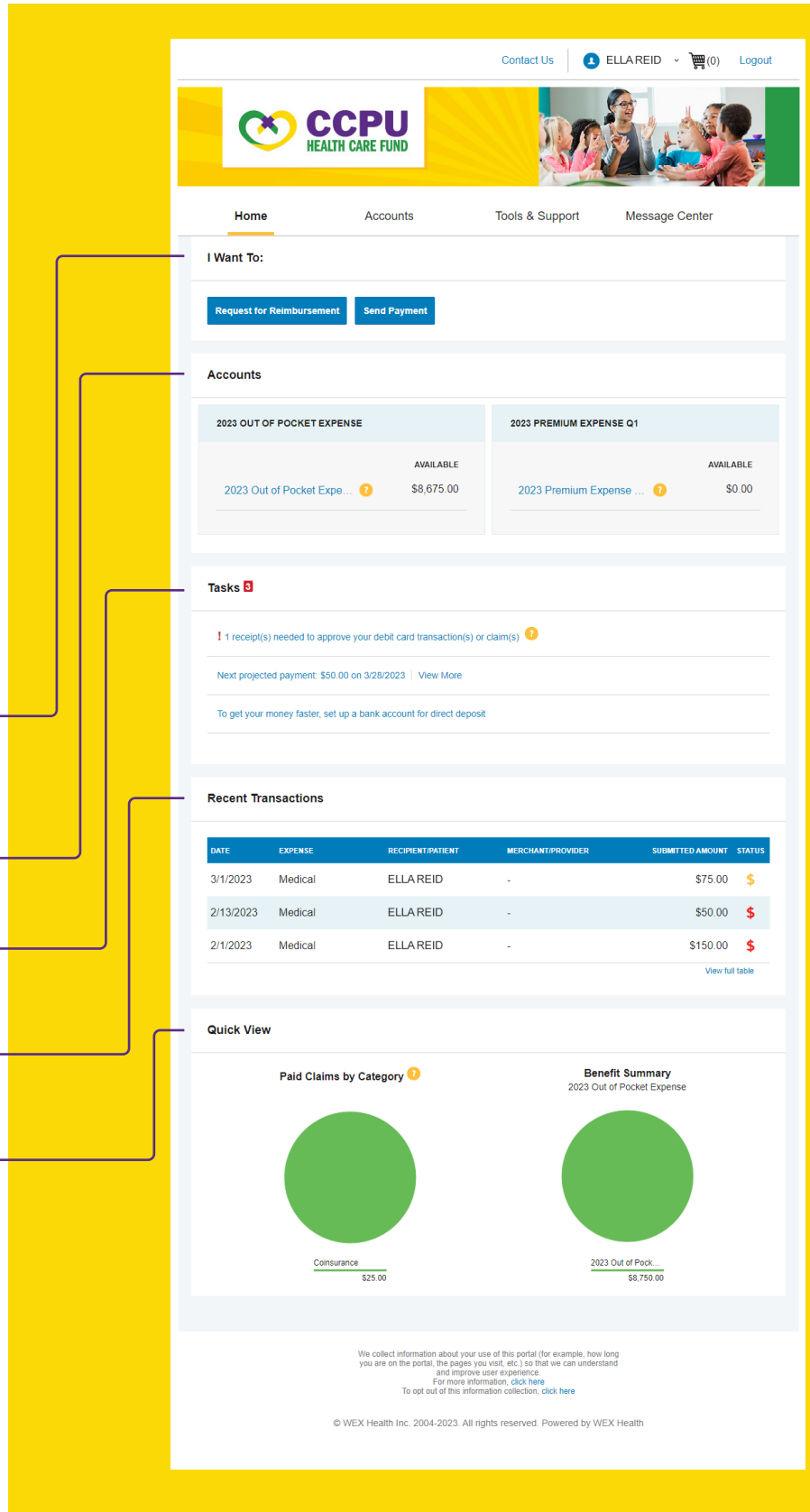
## HOW DO I LOG ON TO THE HOME PAGE?

1. Go to [www.ccpuhealth.org/card](http://www.ccpuhealth.org/card)
2. Enter your login ID and password (both provided by (CCPU Health Care Reimbursement Fund).
  - Your username is your CCPU Health Care Reimbursement Fund ID. This can be found on the Welcome Letter you received.
  - Your password is your first name initial, your last name, and your date of birth (DDMMYY) i.e., MGarcia010293.
3. Click **Login**.

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

- Easily access the **Available Balance** and **“I Want To”** sections to work with your accounts right away.
- The **I Want To...** section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to your Accounts and Profile.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Recent Transaction** section displays the last 3 transactions on your account(s).
- 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 CCPU Health Care Fund Home Page. At the top right, there are links for "Contact Us", a user profile for "ELLA REID", a shopping cart icon with "(0)", and a "Logout" link. The main header features the CCPU Health Care Fund logo and a photo of a family. Below the header are navigation tabs: "Home" (selected), "Accounts", "Tools & Support", and "Message Center".

The "I Want To:" section contains two buttons: "Request for Reimbursement" and "Send Payment".

The "Accounts" section displays two summary cards:

2023 OUT OF POCKET EXPENSE		2023 PREMIUM EXPENSE Q1	
	AVAILABLE		AVAILABLE
2023 Out of Pocket Expe...	\$8,675.00	2023 Premium Expense ...	\$0.00

The "Tasks" section shows a notification: "1 receipt(s) needed to approve your debit card transaction(s) or claim(s)". Below this, it states "Next projected payment: \$50.00 on 3/28/2023" and "To get your money faster, set up a bank account for direct deposit".

The "Recent Transactions" section contains a table:

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
3/1/2023	Medical	ELLA REID	-	\$75.00	\$
2/13/2023	Medical	ELLA REID	-	\$50.00	\$
2/1/2023	Medical	ELLA REID	-	\$150.00	\$

The "Quick View" section features two circular gauges:

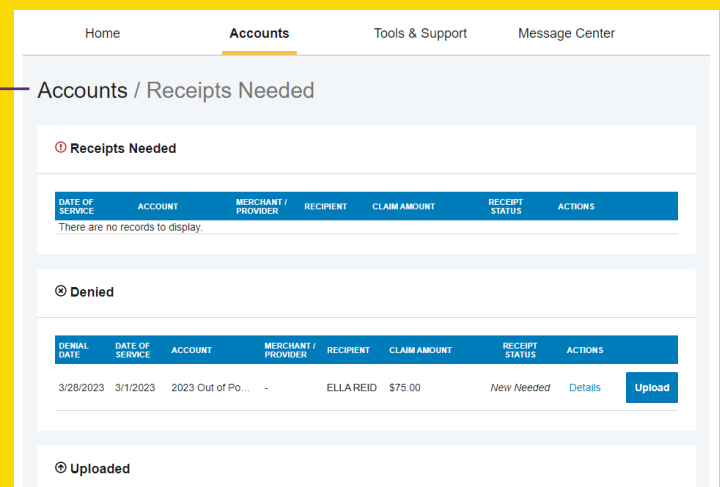
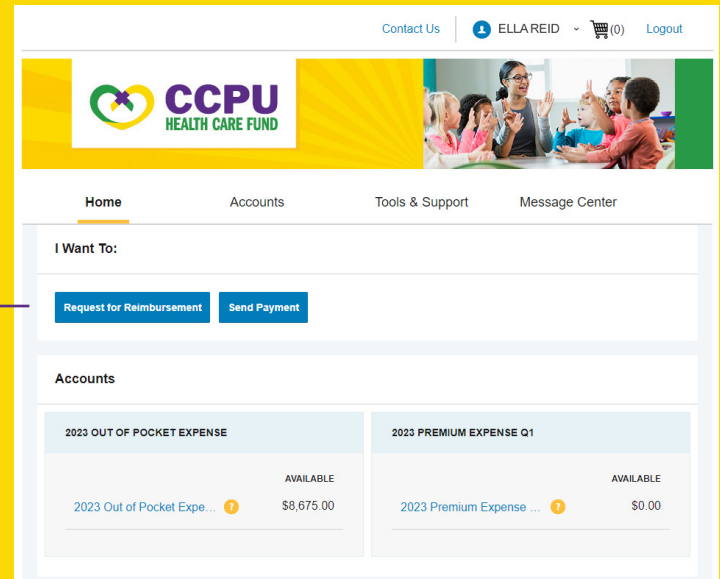
- Paid Claims by Category:** A gauge for "Coinsurance" showing a value of \$25.00.
- Benefit Summary:** A gauge for "2023 Out of Pocket Expense" showing a value of \$8,750.00.

At the bottom, there is a privacy notice: "We collect information about your use of this portal (for example, how long you are on the portal, the pages you visit, etc.) so that we can understand and improve user experience. For more information, click here. To opt out of this information collection, click here." and a copyright notice: "© WEX Health Inc. 2004-2023. All rights reserved. Powered by WEX Health".

## HOW DO I FILE A REIMBURSEMENT AND UPLOAD A RECEIPT?

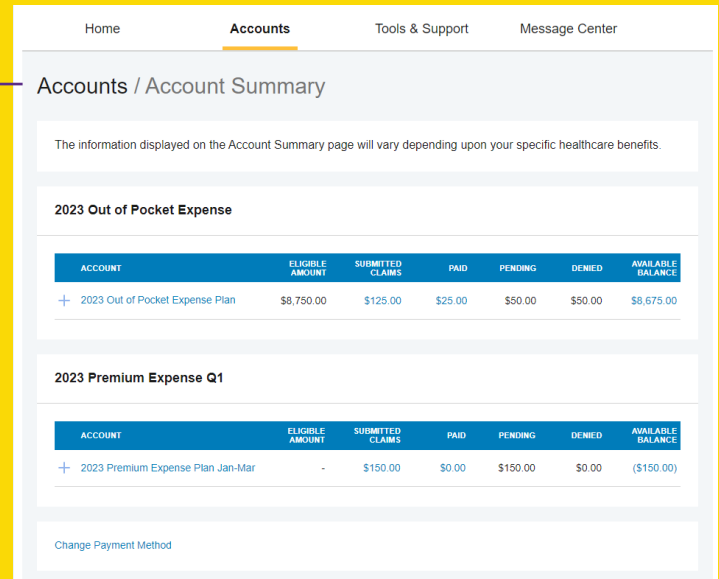
1. On the **Home Page**, you may simply select **Request for Reimbursement** or **Send Payment** under the “I want to...” section, **OR** from any page on the portal, expand the **Accounts** tab on the top of the screen.
2. The reimbursement claim filing wizard will walk you through the request, including entry of information, payee details and uploading a receipt.
3. For submitting more than one reimbursement, click **Add Another** from the **Transaction Summary** page.
4. When all reimbursements are entered in the **Transaction Summary**, agree to the terms and conditions and click **Submit** to send the reimbursements 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, you can upload the receipt from this screen or print a **Claim Confirmation Form** to submit to the administrator with the required receipts.

**NOTE:** If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page or use one of your **Mobile Quick Receipts**.



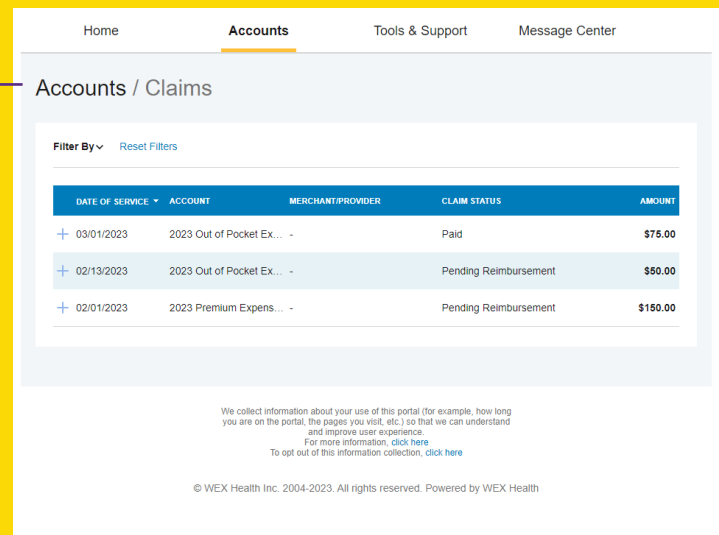
## HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.
2. For all Account Activity, click on the **Accounts** tab from the Home Page 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.



## HOW DO I VIEW MY REIMBURSEMENT CLAIMS HISTORY AND STATUS?

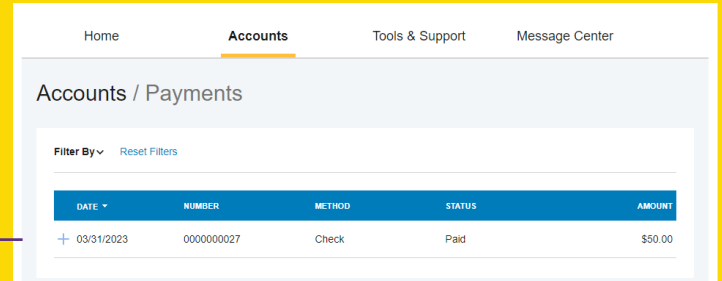
1. From the **Home Page**, click on the **Accounts** tab, and then click on the **Claims** link to see your claims history. You can apply filters from the top of the screen. You can filter by plan year, account type, claim status or receipt status.
2. By clicking on the line of the reimbursement claim, you can expand the data to display additional details.



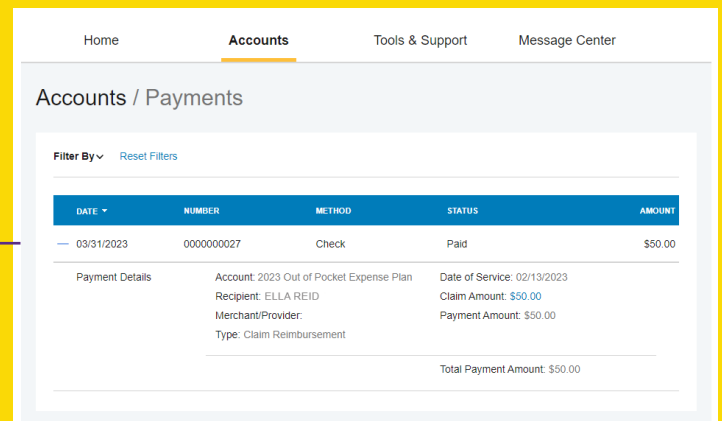
## HOW DO I VIEW MY PAYMENT REIMBURSEMENT HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.

2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.



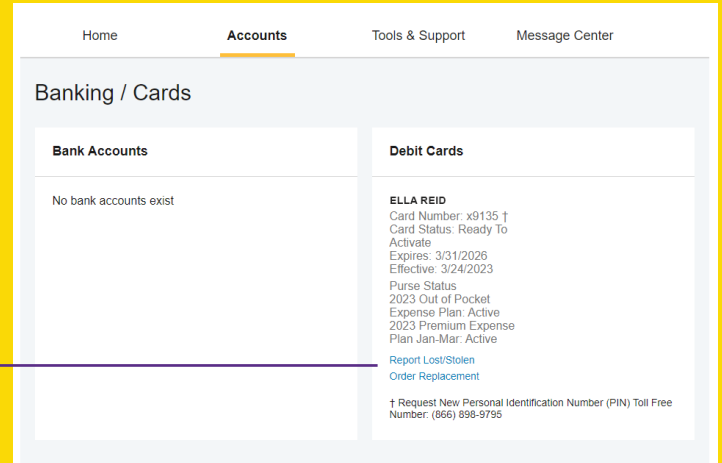
DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 03/31/2023	0000000027	Check	Paid	\$50.00



DATE	NUMBER	METHOD	STATUS	AMOUNT
- 03/31/2023	0000000027	Check	Paid	\$50.00
Payment Details		Account: 2023 Out of Pocket Expense Plan Recipient: ELLA REID Merchant/Provider: Type: Claim Reimbursement	Date of Service: 02/13/2023 Claim Amount: \$50.00 Payment Amount: \$50.00	Total Payment Amount: \$50.00

## HOW DO I REPORT A MISSING DEBIT CARD AND/OR REQUEST A NEW CARD?

1. From the **Home Page**, under the **Accounts** tab, click the **Banking** link.

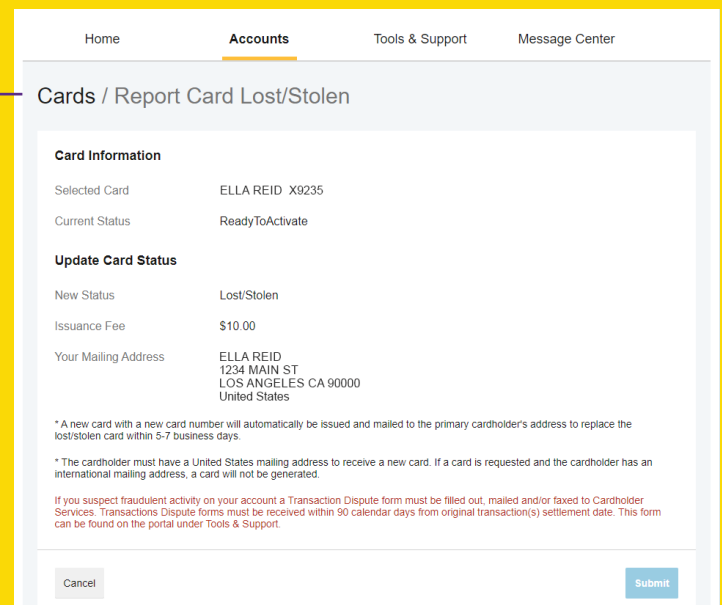


Home **Accounts** Tools & Support Message Center

### Banking / Cards

Bank Accounts	Debit Cards
No bank accounts exist	<p><b>ELLA REID</b></p> <p>Card Number: x9135 †            Card Status: Ready To Activate            Expires: 3/31/2026            Effective: 3/24/2023            Purse Status            2023 Out of Pocket Expense Plan: Active            2023 Premium Expense Plan Jan-Mar: Active</p> <p><a href="#">Report Lost/Stolen</a>  <a href="#">Order Replacement</a></p> <p>† Request New Personal Identification Number (PIN) Toll Free Number: (866) 898-9795</p>

2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.



Home **Accounts** Tools & Support Message Center

### Cards / Report Card Lost/Stolen

**Card Information**

Selected Card	ELLA REID X9235
Current Status	ReadyToActivate

**Update Card Status**

New Status	Lost/Stolen
Issuance Fee	\$10.00
Your Mailing Address	ELLA REID 1234 MAIN ST LOS ANGELES CA 90000 United States

\* A new card with a new card number will automatically be issued and mailed to the primary cardholder's address to replace the lost/stolen card within 5-7 business days.

\* The cardholder must have a United States mailing address to receive a new card. If a card is requested and the cardholder has an international mailing address, a card will not be generated.

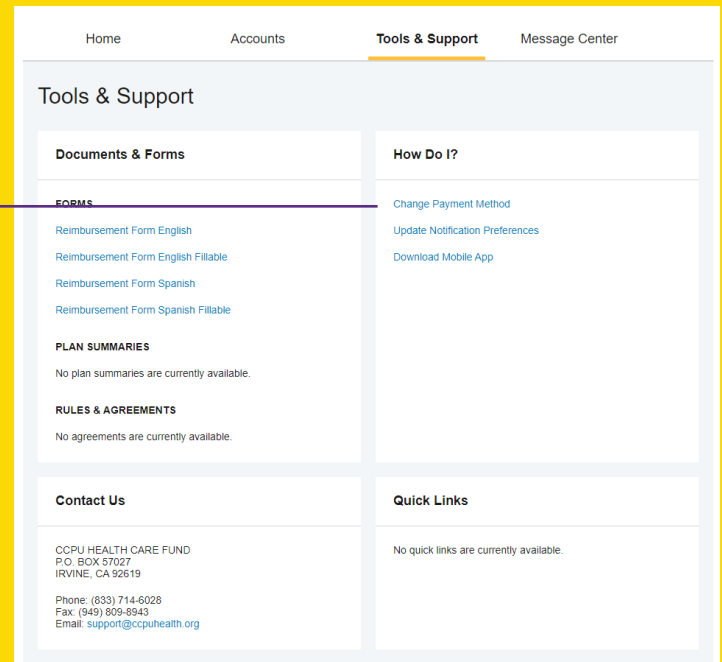
If you suspect fraudulent activity on your account a Transaction Dispute form must be filled out, mailed and/or faxed to Cardholder Services. Transactions Dispute forms must be received within 90 calendar days from original transaction(s) settlement date. This form can be found on the portal under Tools & Support.

Cancel Submit

## HOW DO I GET MY REIMBURSEMENT FASTER?

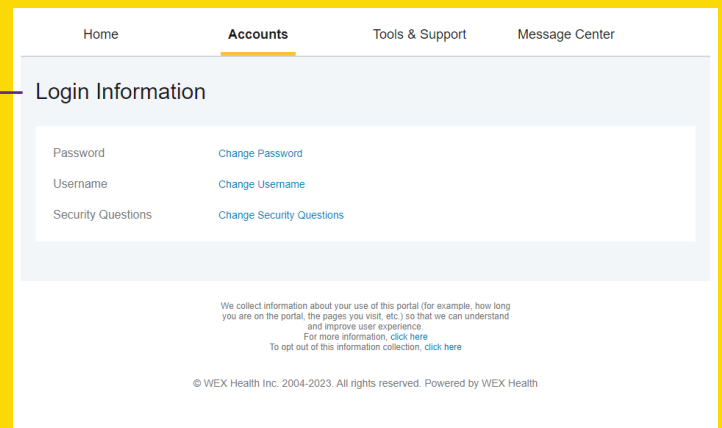
The fastest way to get your money is to sign up online for direct deposit to your personal checking account.

1. From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the “**How Do I**” section.
2. Select **Update** for the appropriate plans. Update the secondary reimbursement method to **Direct Deposit**.
3. Enter your bank account information and click **Submit**.
4. The **Payment Method Changed** confirmation displays.
5. Please note: There is a bank validation requirement. You will be notified on the portal to look for a small transaction or “micro-deposit” in your designated bank account in the next couple of days to enter online, which will validate your account.



## HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

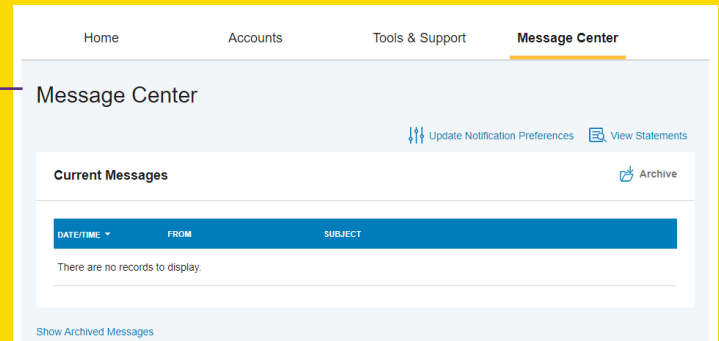
1. From the **Home Page**, click on the **Accounts** tab, and click **Login Information**.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click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



## HOW DO I VIEW OR ACCESS:

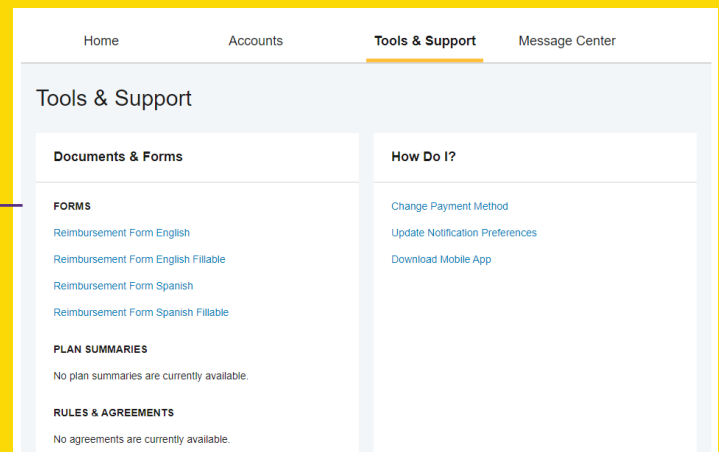
### ...NOTIFICATIONS?

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.



### ...DOCUMENTS & FORMS?

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



### ...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts** tab, you will be directed to the **Account Summary** page.
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.

**OR** from the **Home Page**, under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.

