# 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.

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

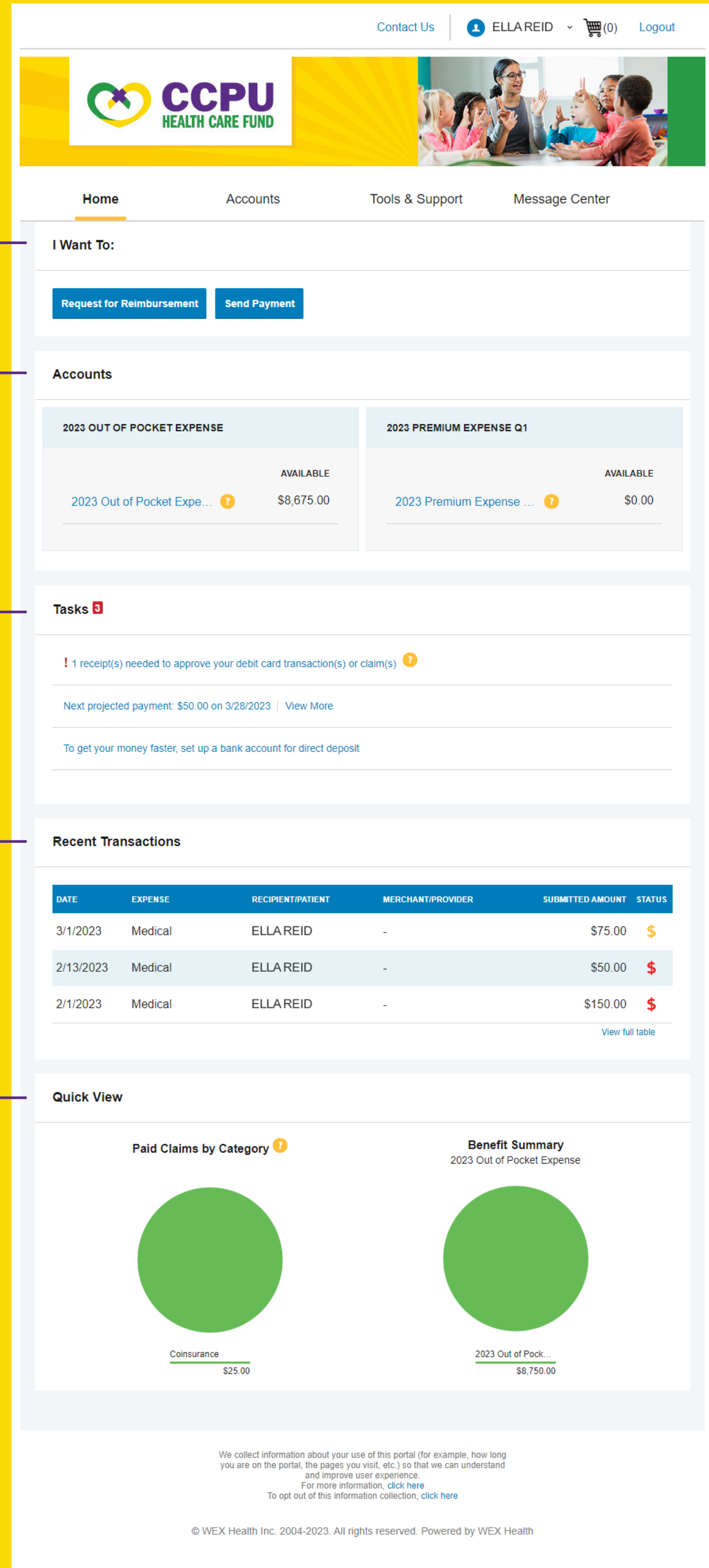
1. Go to [www.ccpuhealth.org/card](http://www.ccpuhealth.org/card)
2. Enter your login ID and password (both provided by (CCPU Health Care Reimbursement Fund).
   - Your username is your CCPU Health Care Reimbursement Fund ID. This can be found on the Welcome Letter you received.
   - Your password is 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.

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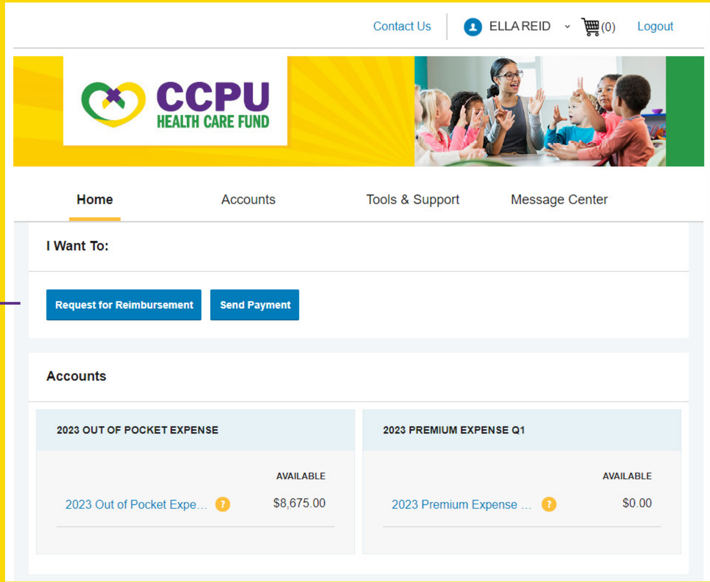
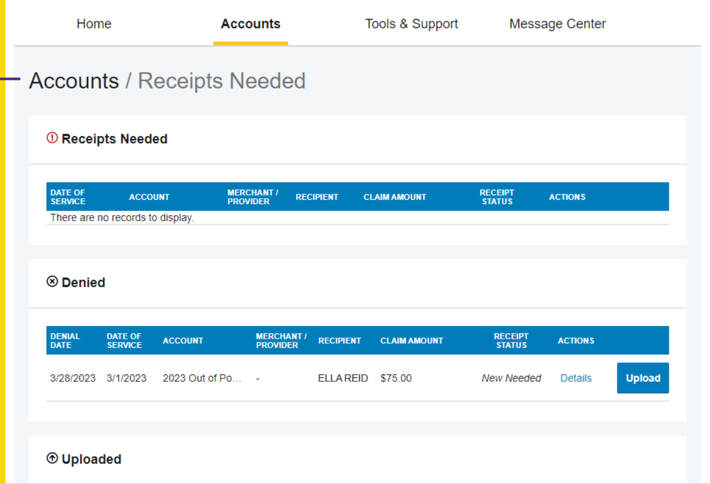
## HOW DO I FILE A REIMBURSEMENT AND UPLOAD A RECEIPT?

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**.

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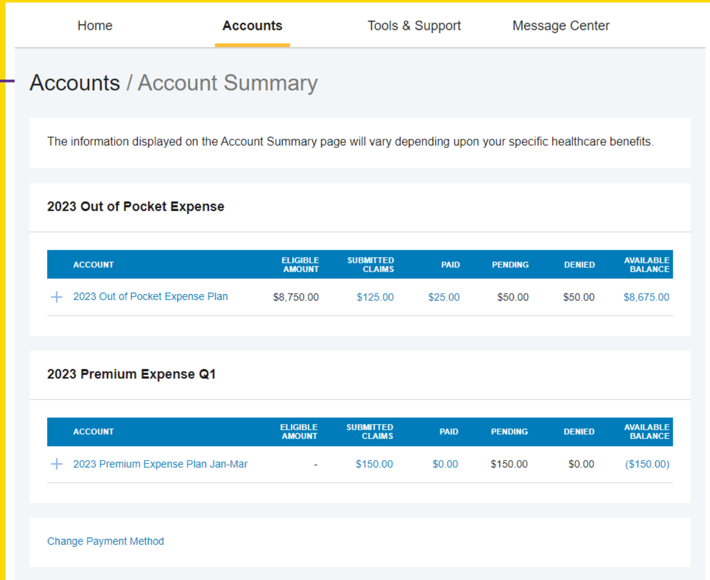
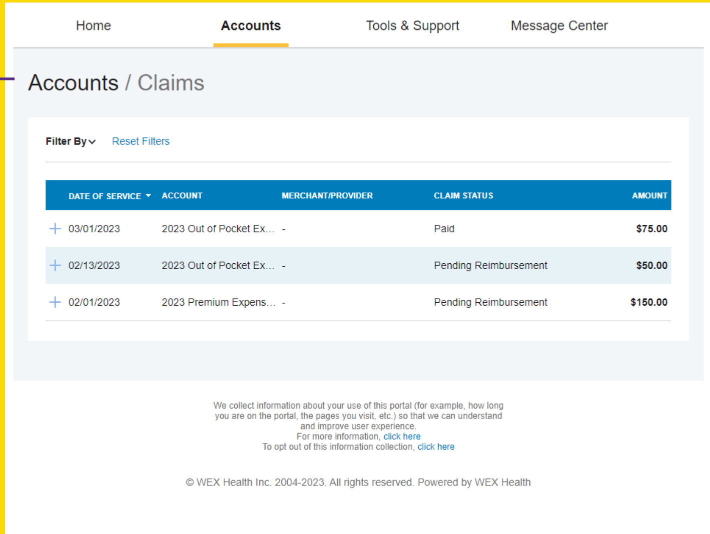
# HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

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.

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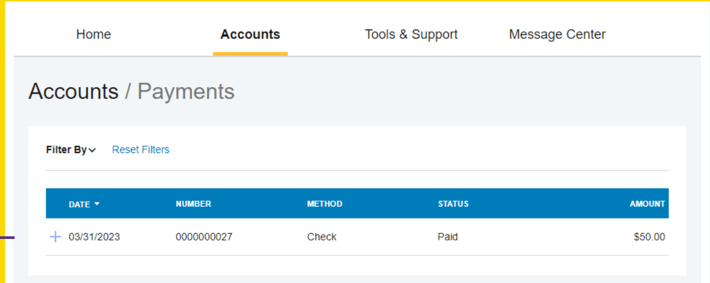
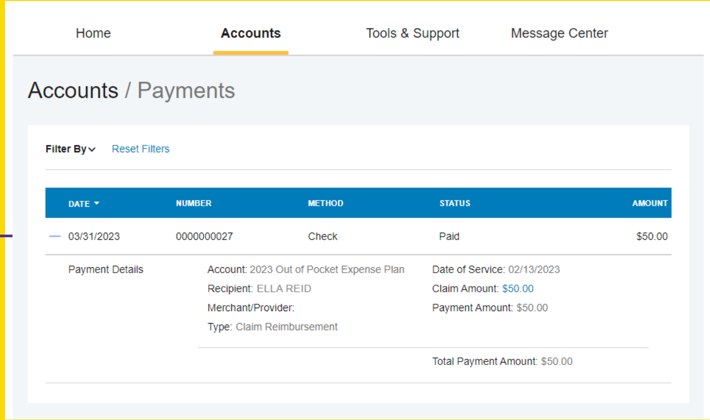
## HOW DO I VIEW MY PAYMENT REIMBURSEMENT HISTORY?

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.

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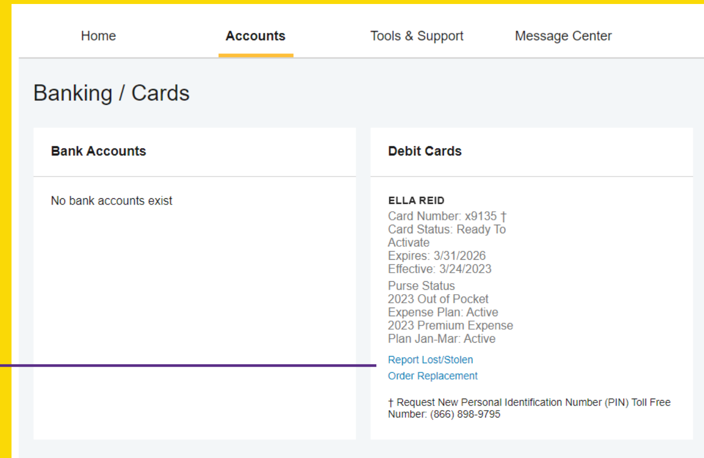
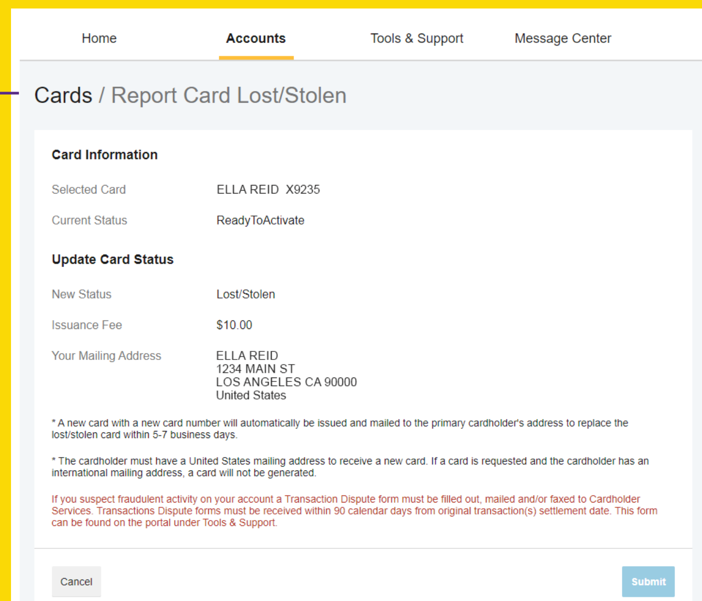
## HOW DO I REPORT A MISSING DEBIT CARD AND/OR REQUEST A NEW CARD?

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




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

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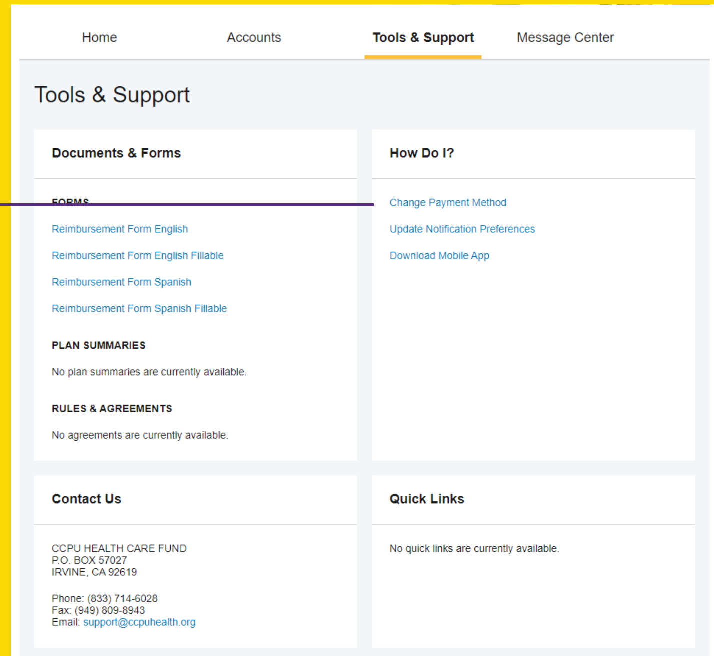
## HOW DO I GET MY REIMBURSEMENT FASTER?

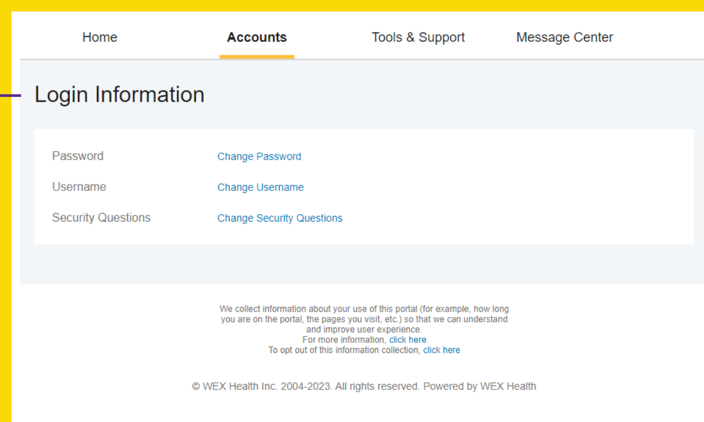
The fastest way to get your money is to sign up online for direct deposit to your personal checking account.

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**.

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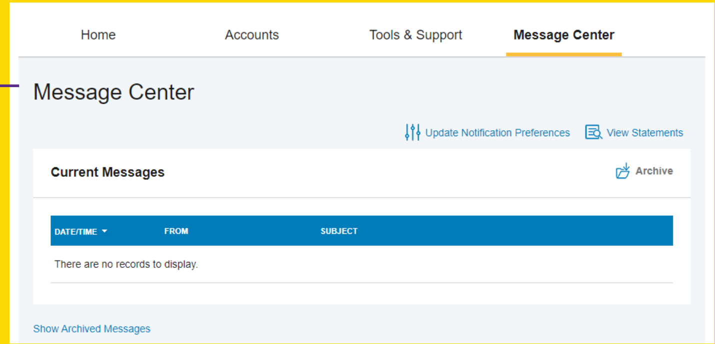
## HOW DO I VIEW OR ACCESS:

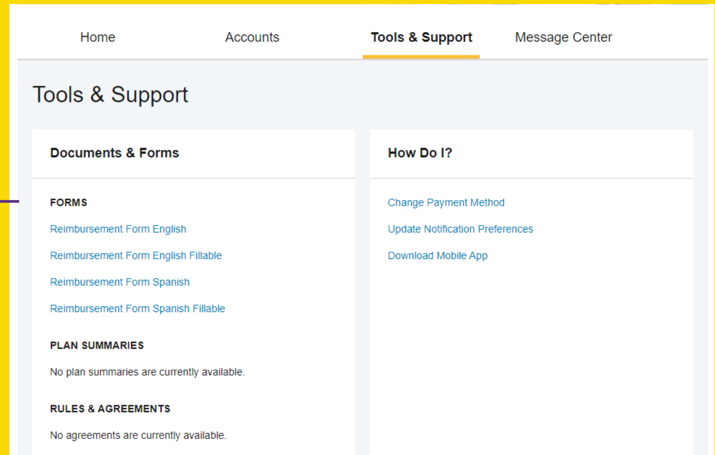
### ...NOTIFICATIONS?

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?

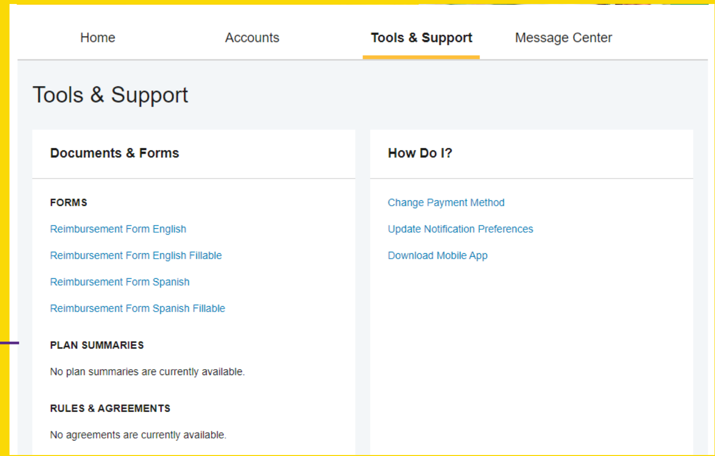
1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.




### ...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.

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