

CONSUMER PORTAL QUICKSTART GUIDE

Welcome to your myCafeteriaPlan Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Pre-Tax accounts including Flexible Spending Account (FSA), Dependent Daycare Accounts, Health Savings Accounts (HSA), Health Reimbursement Account (HRA), and Parking and/or Transit account (QTP). It enables you to:

- File a claim online
- Upload receipts
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Report a lost/stolen Card and request a new one
- Update your personal profile information
- 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 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 IN?

- Go to www.myCafeteriaPlan.com. Click on Account Login.

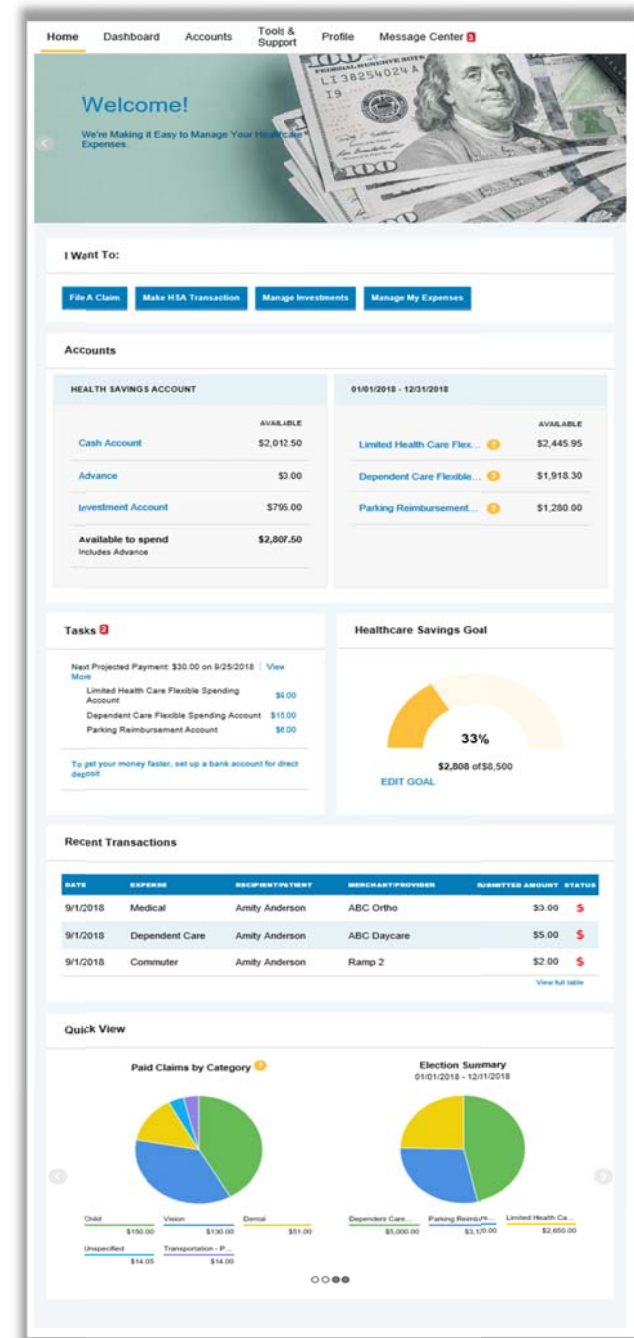
If this is your first time to the website, click on the link under New User to set up your account.

Current myCafeteriaPlan Users will use your existing username and password to log into your account.

The Home Page is easy to navigate:

- Easily access the “I Want To” and Available Balance 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 the Account Summary page, where you can see and manage your accounts.
- The Tasks section displays alerts and relevant links that enable you to keep current on your accounts.
- The Healthcare Savings Goal section graphically displays your HSA savings goals progress (if applicable).
- 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.



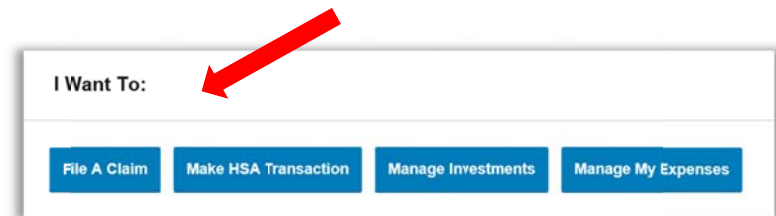
HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the Home Page, you may simply select the “File a Claim” under the “I want to...” section, OR from any page on the portal, expand the “I want to...” section on the right-hand side of the screen.
2. The claim filing wizard will walk you through the request including entry of information, payee details and uploading documentation.
3. For submitting more than one claim, click Add Another, from the Transaction Summary page.
4. When all claims are entered in the Transaction Summary, agree to the terms and conditions and 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 documentation, you can upload documentation from this screen or print a Claim Confirmation Form to submit to the administrator with the required documentation.

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 documentation from this page. Simply click to expand the line item to view claim details and the upload receipts link.

Please note that receipts needed means itemized documentation that lists the following items:

- *Provider Name
- *Patient/Dependent Name
- *Description of Service
- *Date of Service
- *Amount Charged



A screenshot of a web application page titled "Accounts / Receipts Needed". The page has a navigation bar with links for Home, Dashboard, Accounts (highlighted), Tools & Support, Profile, and Message Center (with a notification icon). Below the navigation bar, there is a table titled "Receipts Needed". The table has columns for DATE OF SERVICE, ACCOUNT, MERCHANT / PROVIDER, RECIPIENT, CLAIM AMOUNT, and RECEIPT STATUS. There is also a "View Confirmation" link and an "Upload Receipt(s)" button for each row.

DATE OF SERVICE	ACCOUNT	MERCHANT / PROVIDER	RECIPIENT	CLAIM AMOUNT	RECEIPT STATUS
9/15/2018	Limited Health C...	McKenzie...	Amity And...	\$3.76	Required

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.

NOTE: You can see election details by clicking to expand the line item for each account.

HEALTH SAVINGS ACCOUNT		01/01/2018 - 12/31/2018	
	AVAILABLE		AVAILABLE
Cash Account	\$2,012.50	Limited Health Care Flex...	\$2,445.95
Advance	\$0.00	Dependent Care Flexible...	\$1,918.30
Investment Account	\$795.00	Parking Reimbursement...	\$1,280.00
Available to spend <small>Includes Advance</small>	\$2,807.50		

Home	Dashboard	Accounts	Tools & Support	Profile	Message Center	I Want to:
Accounts / Account Summary						
The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. View More						
Health Savings Account						
AVAILABLE CASH BALANCE		INVESTMENT BALANCE		TOTAL AVAILABLE BALANCE		
\$2,012.50		\$795.00 <small>* Current as of 9/21/2018</small>		\$2,807.50		
ADVANCE BALANCE			ADVANCE REPAYMENT BALANCE			
\$0.00			\$0.00			
01/01/2018 - 12/31/2018				Estimated Per Pay Period Deduction: \$397.45		
ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
Limited Health Care Flexible Spending Account	\$2,850.00	\$211.55	\$195.05	\$9.00	\$7.50	\$2,445.95
Dependent Care Flexible Spending Account	\$5,000.00	\$165.00	\$150.00	\$15.00	\$0.00	\$1,918.30
Parking Reimbursement Account	\$3,120.00	\$20.00	\$14.00	\$6.00	\$0.00	\$1,280.00
<small>Pay check deductions are based on your election and the number of scheduled pay periods within the plan year.</small>						

TRACK ALL YOUR ACTIVITY IN ONE PLACE

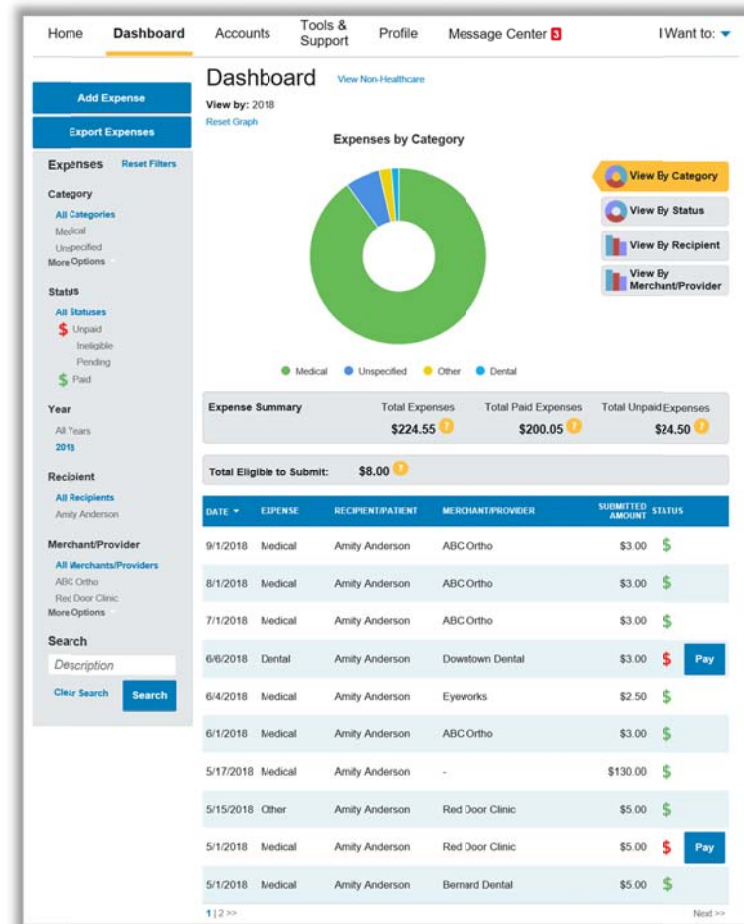
To view and manage **ALL** expense activity from **EVERY** source, use the **DASHBOARD**

1. On the **Home Page**, under the **Dashboard** tab. The **Dashboard** provides you with an easy-to-use consolidated view of healthcare expenses for ongoing management of medical claims, 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.

You can add expenses like premium costs to this section to see an overview of all of your pre-tax benefits. You can even upload a copy of the receipt and add notes for your records. These expenses do not have to be claimed as part of your account.

By adding expenses into the Dashboard it does not file a claim into your account. If you would like reimbursed, please go to file a claim in the “I Want To...” section.

By clicking on the expense, you can expand the section to display additional details about the transaction.



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.

Did you Know? For an alternative perspective, you may also view claims history and status for all claim types including dependent care on the **Dashboard** page. You can apply filters from the left-hand side of the screen. Filter options on the Dashboard screen include: expense type, status, date, recipient or merchant/provider. You may also search for a specific expense by entering a description into the search field.

DATE	NUMBER	METHOD	STATUS	AMOUNT
07/02/2018	000027526	Check	Paid to Provider	\$10.00
07/02/2018	000027525	Check	Paid to Provider	\$10.00
06/28/2018	0000465885	Check	Paid to Provider	\$15.00
06/28/2018	0000465884	Check	Paid to Provider	\$15.00
06/28/2018	0000465883	Check	Paid	\$150.00
06/28/2018	0000465881	Check	Paid to Provider	\$5.00
06/28/2018	0000465879	Check	Paid to Provider	\$7.00
06/28/2018	0000465867	Check	Paid to Provider	\$5.00
06/28/2018	0000000000	Direct Deposit	Paid	\$24.00
06/28/2018	0000000000	Direct Deposit	Paid	\$3.00

HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

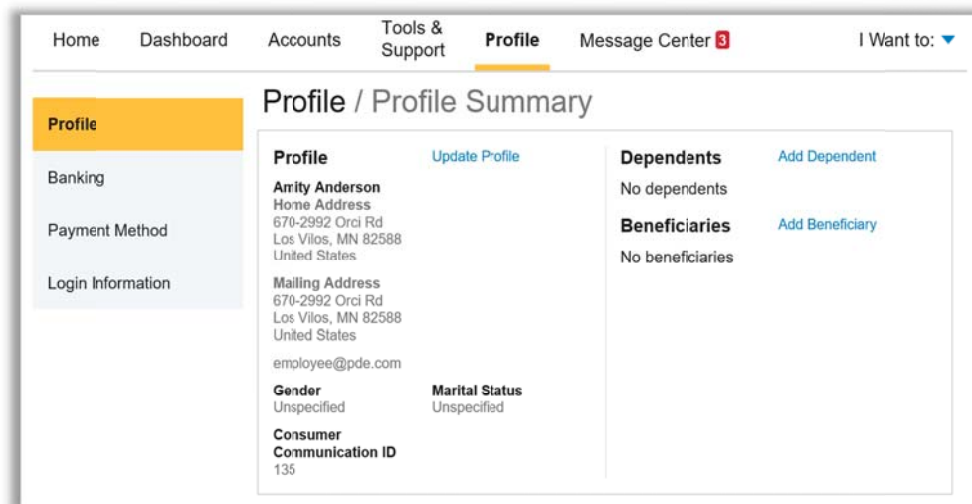
1. From the **Home Page**, click on the **Accounts** tab, and then click on the **Claims** link to see your claims history. You can apply filters from the left-hand side of the screen. You can filter by plan year, account type, claim status or receipt status.
2. By clicking on the line of the claim,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

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
09/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
09/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
09/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
08/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
08/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
08/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
07/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
07/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
07/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00

HOW DO I UPDATE MY PERSONAL PROFILE?

(This option may not be available with all plans)

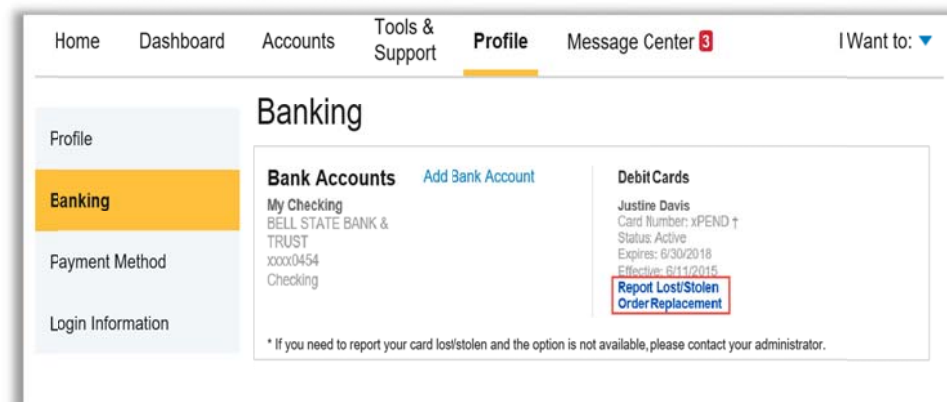
1. From the **Home Page**, under the **Profile**, you will find links to update profile information including profile summary details, dependents, and beneficiaries.
2. Click the appropriate link on the Profile screen for your updates: **Update Profile** or **Add/Update Dependent** or **Add Beneficiary**. 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 REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

(This option may not be available with all plans)

1. From the **Home Page**, under the **Profile**, click the **Banking** link on the left-hand side of the screen.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.

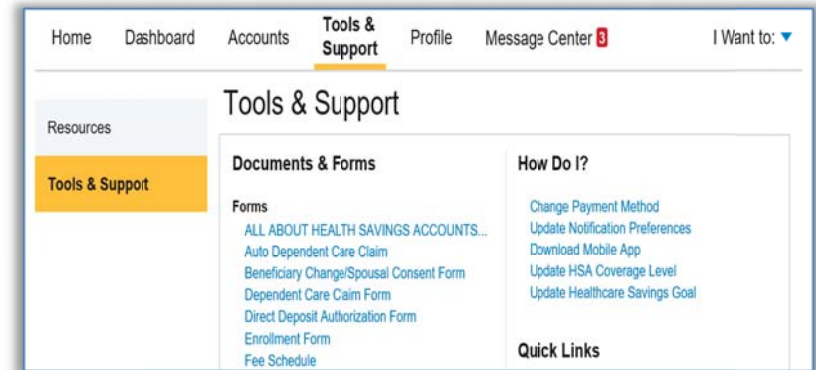


HOW DO I GET MY REIMBURSEMENT FASTER?

(This option may not be available with all plans)

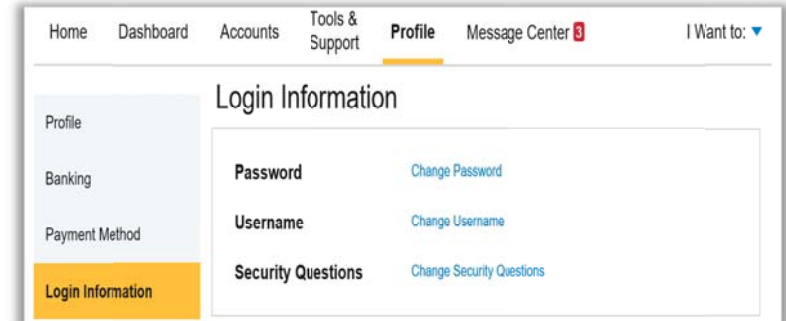
The fastest way to get your money is to sign up online for direct deposit to your personal checking account.

1. From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the “**How DO I**” section
2. Select the **Primary Payment Method** and/or **Alternate Payment Method** click **Submit**. The **Add Bank Account: Direct Deposit Setup** page displays.
3. Enter your bank account information, and click **Submit**.
4. The **Payment Method Changed** confirmation displays.



HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Profile** tab, and click **Login Information** on the left-hand navigation bar.
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. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

...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.

...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** tab, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.

