

## CONSUMER PORTAL QUICKSTART GUIDE

Welcome to your UCHealth Plan Administrators Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view account information and manage your Flexible Spending Account, including your Health Care Spending Account and/or your Dependent Care Spending Account. 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
- 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 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 <http://tpa.uchealth.org>.
2. Locate “Members” and click on “More Information”.
3. Choose the flexible spending option.
4. Beneath “New User,” click “Create your new username and password.”
5. A username is pre-populated. Create a password that you will remember.
6. You may change your username after your initial 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 options within 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 tpa.uchealth.org portal. At the top, it displays the user's name 'April Clarke' and a 'Logout' link. Below this is a navigation menu with tabs for 'Home', 'Accounts', 'Profile', 'Statements & Notifications', 'Tools & Support', and 'Dashboard'. The main content area is divided into several sections:

- I Want To...**: A vertical list of action buttons including 'File A Claim', 'Make HSA Distribution', 'Make HSA Contribution', and 'Manage My Expenses'.
- Available Balance**: A summary table showing account balances:

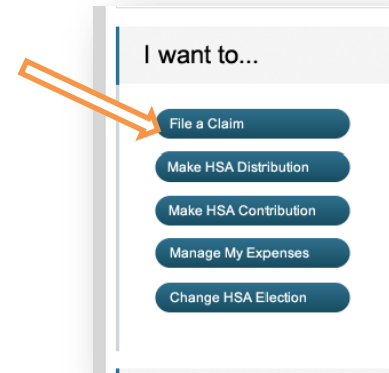
Account Type	Balance
Health Savings Ac...	\$355.00
DCFSA	\$548.33
LPFSA	\$2,029.40
- Welcome!**: A greeting message: 'We're Making it Easy to Manage Your Healthcare Expenses' with a background image of a man working on a laptop.
- Message Center**: A notification area with a red '4' icon, stating '1 receipt(s) needed to approve your claims' and providing a 'Next projected payment: \$75.00 on 5/13/2014' with a 'View More' link. It also includes a 'Download Mobile App' link and a prompt to 'get your money faster' by setting up a bank account for direct deposit.
- Quick View**: Two pie charts. The first, 'Paid Claims by Category', shows \$140.75 on Dental and \$72.85 on Vision. The second, 'Election Summary for 01/01/2014 - 12/31/2014', shows \$2,500.00 to LPFSA and \$2,500.00 to DCFSA.

At the bottom, there is a footer with contact information: 'Contact Us - Call Consumer Support at (612) 555-5959, Toll Free at (800) 555-5959 or Email us at nobody@lighthouse1.com'. Copyright information for Evolution1, Inc. (2004-2014) and a note that the site is powered by iCloud, a product of Evolution1® are also present.

## 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.
2. **OR** on the **Home Page**, under the **Accounts** tab, click **File Claims** link.
3. 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**.
4. For submitting more than one claim, click **Add Another Claim**, select the Account Type and complete the form and click **Add Claim**.
5. When all claims are entered in the **Claims Basket**, click **Submit** to send the claims for processing.
6. 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.
7. 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.)
8. The Receipt Uploaded confirmation appears: “Your receipt has been uploaded. You may upload additional receipts if needed until the claim is approved.”
9. 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   <a href="#">Logout</a>	
<b>Receipts Needed</b>							
<b>Receipts Needed</b>							
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status		
LPFSA	5/1/2014	Dr. Sickels	April Clarke	\$46.00	Required	<a href="#">Upload Receipt</a> <a href="#">View Confirmation</a>	
DCFSA	2/1/2014 - 2/28/2014	Mrs. Smith's Daycare	Cindy Clarke	\$290.00	Overdue	<a href="#">Upload Receipt</a> <a href="#">View Confirmation</a>	
<b>Receipts Uploaded and Awaiting Approval</b>							
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status		
LPFSA	1/31/2014	Dr. Dental	April Clarke	\$257.00	Uploaded	<a href="#">Upload Receipt</a> <a href="#">View Confirmation</a>	

## 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
<a href="#">Health FSA</a>	<u>\$1,100.00</u>	<u>\$185.07</u>	<u>\$108.20</u>	\$16.87	\$60.00	\$974.93	<u>\$974.93</u>
<a href="#">HRA 2013</a>	<u>\$416.66</u>	<u>\$0.00</u>	<u>\$0.00</u>	\$0.00	\$0.00	\$416.66	<u>\$416.00</u>
<a href="#">Incentive Account</a>	<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 dashboard view of healthcare expenses for ongoing management of medical claims, premiums, and card transactions.
2. You may also choose to process payments/reimbursements from the Expense Tracker link for unpaid expenses.

### Medical Claims and Premiums



### CDH Payments Reimbursements Pay the Provider

Last Login: 5/13/2014 - Online April Clarke Logout

Home Accounts Profile Statements & Notifications Tools & Support **Dashboard** I Want to... ▾

**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  
 Undefined

**Dashboard** Go to Expense Tracker

Expense Summary	Total Healthcare Expenses	Total Paid Expenses	Total Unpaid Expenses
	\$1,233.82	\$564.13	\$669.69

Total Eligible to Submit: **\$281.69**

Date	Expense	Recipient	Merchant/Provider	Submitted Amount	Status
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	Paid

Claim Number: KDC0014030P000101 Date(s) of Service: 2/15/2014  
 Account: LFFSA Paid: \$88.40  
 Expense Category: Dental  
 Source: Online Claim  
 Receipt Status: Received  
[View Receipt](#)

Date	Expense	Recipient	Merchant/Provider	Submitted Amount	Status
02/14/2014	Dental	April Clarke	-	\$57.69	Unpaid
02/09/2014	Medical	April Clarke	Dr. Dental	\$52.35	Paid
02/01/2014	Medical	April Clarke	Dr. Sickels	\$72.85	Paid
02/01/2014	Vision	April Clarke	-	\$105.00	Unpaid
01/31/2014	Medical	April Clarke	Dr. Dental	\$257.00	Unpaid
01/20/2014	Dental	April Clarke	-	\$52.00	Unpaid

Contact Us - Call Consumer Support at (812) 555-5869, Toll Free at (800) 555-5869 or Email us at [nobody@lighthouse1.com](mailto:nobody@lighthouse1.com)

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### Debit Card Transactions



### Receipts and Expenses

## 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.

## 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, including debit card transactions.
2. Click **View Detail** on the far right to see claim details.

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

1. On the **Home Page**, under the **Profile** tab, click **Debit Cards** on the drop-down menu.
2. Under the Actions column on the Debit Cards form, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.

## 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. On the **Home Page**, under the **Accounts** tab, click **Change Payment Method** on the drop-down menu.
2. Select **Direct Deposit** and click **Change Payment Method**. 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. 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.

## QUESTIONS?

Please contact UHealth Plan Administrators at (800) 207-1018 for any additional questions you may have.