

# 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 354 Retiree Fund 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.ibew354retireefund.com](http://www.ibew354retireefund.com) . On the main page is a link to the consumer portal.
2. Enter your login ID (first initial, last name, last 4 of social security number, i.e. lastname1234) 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 Evolution1 consumer portal home page for user April Clarke. The page features a top navigation bar with tabs for Home, Accounts, Profile, Statements & Notifications, Tools & Support, and Dashboard. The main content area is divided into several sections:

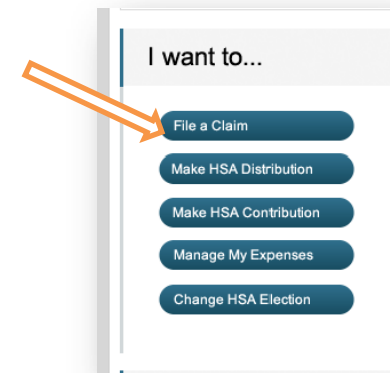
- I Want To...**: A vertical list of buttons for File A Claim, Make HSA Distribution, Make HSA Contribution, and Manage My Expenses.
- Available Balance**: A table showing balances for Health Savings Ac... (\$355.00), DCPSA (\$548.33), and LPFSA (\$2,029.40).
- Welcome!**: A large banner with a photo of a man at a laptop and the text "We're Making it Easy to Manage Your Healthcare Expenses".
- Message Center**: A section with a red notification icon, stating "1 receipt(s) needed to approve your claims" and providing a next projected payment of \$75.00 on 5/13/2014.
- Quick View**: Two pie charts. The first, "Paid Claims by Category", shows \$148.75 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 contact information for consumer support and copyright information for Evolution1, Inc. (2004-2014), powered by iCloud.

## 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   <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>	<a href="#">\$1,100.00</a>	<a href="#">\$185.07</a>	<a href="#">\$108.20</a>	\$16.87	\$60.00	\$974.93	<a href="#">\$974.93</a>
<a href="#">HRA 2013</a>	<a href="#">\$416.66</a>	<a href="#">\$0.00</a>	<a href="#">\$0.00</a>	\$0.00	\$0.00	\$416.66	<a href="#">\$416.00</a>
<a href="#">Incentive Account</a>	<a href="#">\$1,500.00</a>	<a href="#">\$0.00</a>	<a href="#">\$0.00</a>	\$0.00	\$0.00	\$1,500.00	<a href="#">\$50.00</a>

## HOW DO I VIEW MY 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. 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.