

# CONSUMER PORTAL QUICKSTART GUIDE



## HOW DO I LOG ON TO HOME PAGE?

1. Go to <https://AccrueCMS.lh1ondemand.com>
2. Enter your login ID: First Name Initial, Last Name, Last 4 digit SSN (example: jbear1234)
3. Enter your initial password: First Name Initial, Last Name, Last 4 digit SSN (example: jbear1234)
4. 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.

Last Login: 4/5/2017 - Online Justine Davis (0) Logout

Home Dashboard Accounts Tools & Support Statements & Notifications Profile

**Creative Companies**

I Want To...

- File A Claim
- Make HSA Transaction
- Manage Investments
- Manage My Expenses

**Available Balance**

Account Type	Balance
HSA Cash Account	\$1,000.00
HSA Investment Account	\$232.00
LPFSA	\$1,500.00
HRA	\$748.68

Save with HSA Store  
Shop for medical expenses

**Message Center**

- 2 repayment(s) totaling \$46.82 due for paid claims that were later denied
- 2 receipt(s) needed to approve your claims
- Next projected payment: \$178.90 on 4/5/2017 [View More](#)

**Recent Transactions**

Date	Expense	Merchant/Provider	Submitted Amount	Status
3/16/2017	Pharmacy	-	\$5.00	\$
3/16/2017	Dental	-	\$3.00	\$
3/15/2017	Medical	ABC Clinic	\$100.00	\$

**Quick View**

**HSA Contribution & Distribution Activity**

Year	Contributions	Distributions
2017	\$0.00	\$0.00
2016	\$975.00	\$0.00
2015	\$1,525.00	\$0.00

**HSA Contributions by Tax Year**

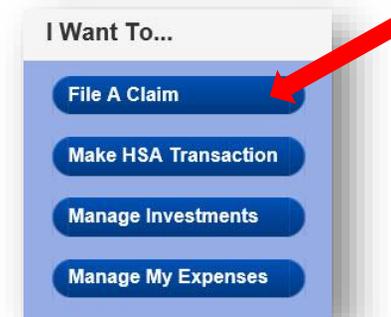
Year	Contributions	Maximum
2017	\$0.00	of \$4,400.00
2016	\$975.00	of \$4,350.00
2015	\$1,525.00	of \$4,350.00

\*Represents your contributions and distributions included in all "normal" transactions per IRS forms 1099SA and 5498SA for the indicated tax year. Excludes fees, interest, transfers, rollovers, and pending transactions.  
\*Represents your contributions year to date compared to the maximum amount you can contribute based on IRS guidelines.  
\*Contribution amounts do not include pending contributions or rollovers.

## 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 which can be located on the lefthand side of the home page.  
**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 a receipt.
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 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, 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 Message Center 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. Simply click to expand the line item to view claim details and the **upload receipts link**.



HOME	DASHBOARD	ACCOUNTS	TOOLS & SUPPORT	STATEMENTS & NOTIFICATIONS	PROFILE	Justine Davis ▾ Last Login: 4/5/2017 - Online   <a href="#">Logout</a>	
<b>Receipts Needed</b>							
<b>Receipts Needed</b>							
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status		
HRA	3/14/2017	Dr Smith	Justine Davis	\$200.00	Overdue	<a href="#">Upload Receipt</a> <a href="#">View Confirmation</a>	
HRA	3/10/2017	Dr. Way	Justine Davis	\$37.49	Overdue	<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, click on the **Available Balance** link 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.

**I Want To...**

[File A Claim](#)

[Make HSA Transaction](#)

[Manage Investments](#)

[Manage My Expenses](#)

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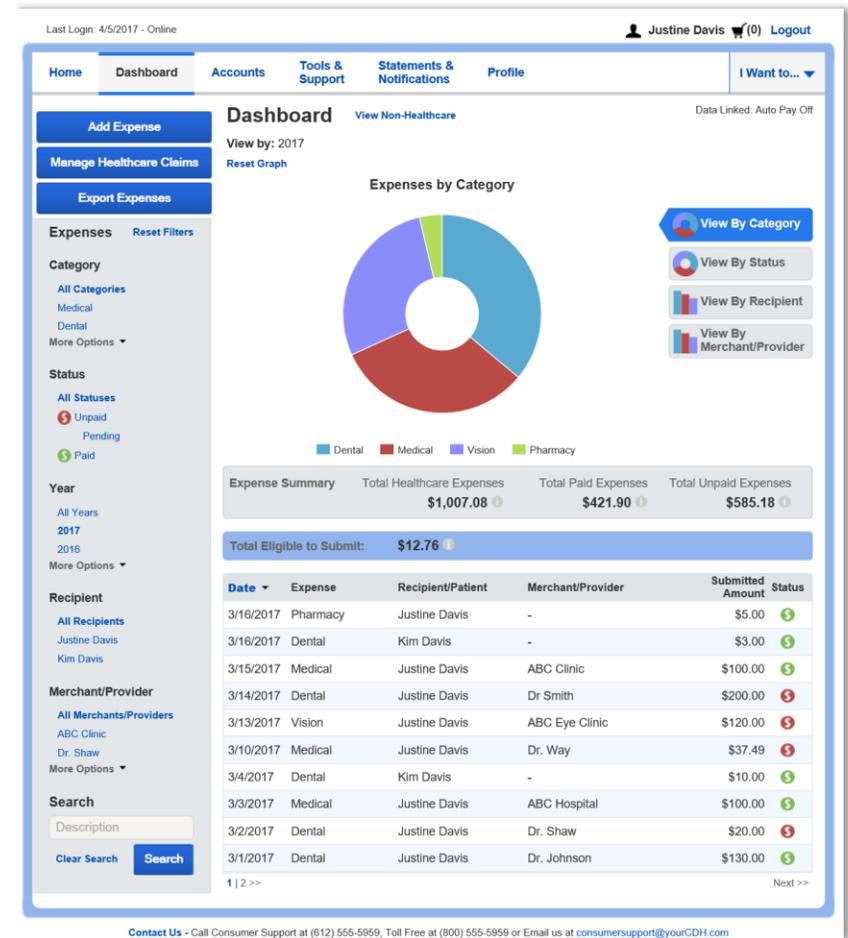
[Available Balance](#) ⓘ

Home	Accounts	Profile	Statements & Notifications	Tools & Support	Dashboard	I Want to...																																			
<b>Account Summary</b>																																									
<p><b>Accounts / Account Summary</b></p> <p>The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. Add your custom text! <a href="#">View More</a></p> <p><b>Health Savings Account</b></p> <table border="1"> <thead> <tr> <th>Available Cash Balance</th> <th>Investment Balance</th> <th colspan="2">Total Available Balance</th> </tr> </thead> <tbody> <tr> <td>\$200.00</td> <td>\$3,065.00 <small>* Current as of 4/30/2015</small></td> <td colspan="2">\$3,265.00</td> </tr> </tbody> </table>							Available Cash Balance	Investment Balance	Total Available Balance		\$200.00	\$3,065.00 <small>* Current as of 4/30/2015</small>	\$3,265.00																												
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## 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 consolidated view of healthcare expenses for ongoing management of medical claims, premiums, 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.



## HOW DO I ADD AN EXPENSE TO THE DASHBOARD?

1. From the **Dashboard** click on the **Add Expense** button in the upper left side of the page.
2. Complete the expense detail fields. You can even upload a copy of the receipt and, add notes for your records.
3. Once the expense has been added to the **dashboard** you can pay the expense, if desired.

## HOW DO I PAY AN EXPENSE?

1. You may process payments/ reimbursements for unpaid expenses directly from the **Dashboard** page.
2. Expenses will be categorized and **payment** can be initiated for unpaid expenses by clicking on the button to the right of the expense details.
3. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment.
4. When you click **Pay**, the claim details from the **Dashboard** will be pre-populated within the claim form. Review & edit the claim details as needed.
5. You will have the option to either request a reimbursement to yourself or, pay the provider.

The screenshot shows the WEX Health Dashboard interface. At the top, there's a navigation bar with 'Home', 'Dashboard', 'Accounts', 'Tools & Support', 'Payments & Notifications', and 'Profile'. A red arrow points to the 'Add Expense' button in the top left. Below the navigation, there are buttons for 'Add Expense', 'Manage Healthcare Claims', and 'Export Expenses'. The main content area features a donut chart titled 'Expenses by Category' with a legend for Dental (blue), Medical (red), Vision (purple), and Pharmacy (green). To the right of the chart are filters for 'View By Category', 'View By Status', 'View By Recipient', and 'View By Merchant/Provider'. Below the chart is an 'Expense Summary' table with columns for 'Total Healthcare Expenses' (\$1,007.08), 'Total Paid Expenses' (\$421.90), and 'Total Unpaid Expenses' (\$585.18). A 'Total Eligible to Submit' of \$12.76 is also shown. At the bottom, there is a table of expense details with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status.

Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status
3/16/2017	Pharmacy	Justine Davis	-	\$5.00	🟢
3/16/2017	Dental	Kim Davis	-	\$3.00	🟢
3/15/2017	Medical	Justine Davis	ABC Clinic	\$100.00	🟢
3/14/2017	Dental	Justine Davis	Dr Smith	\$200.00	🔴
3/13/2017	Vision	Justine Davis	ABC Eye Clinic	\$120.00	🔴
3/10/2017	Medical	Justine Davis	Dr. Way	\$37.49	🔴
3/4/2017	Dental	Kim Davis	-	\$10.00	🟢
3/3/2017	Medical	Justine Davis	ABC Hospital	\$100.00	🟢
3/2/2017	Dental	Justine Davis	Dr. Shaw	\$20.00	🟢
3/1/2017	Dental	Justine Davis	Dr. Johnson	\$130.00	🟢

## HOW DO I EDIT AN EXISTING EXPENSE IN THE DASHBOARD?

1. You can edit expense details for all claim statuses directly from the **Dashboard** page.
2. Expand the claim details visible by clicking on the expense line item from the Dashboard.
3. You will be presented with options to add expense notes, update the expense details, mark the expense as paid/unpaid or, remove the expense from the Dashboard.

Total Eligible to Submit: <b>\$215.14</b>					
Date ▾	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status
5/20/2015	Medical	Cindy Clarke	Metropolitan DentalCare	\$100.00	Ⓢ
5/6/2015	Medical	April Clarke	Metropolitan Clinic	\$142.30	Ⓢ
4/28/2015	Medical	April Clarke	LabAmerica	\$60.69	Ⓢ
4/23/2015	Laboratory	April Clarke	Physician Services	\$79.08	Ⓢ <a href="#">Pay</a>

Expense Details	Description: X-rays	Date(s) of Service: 4/23/2015
	Source: Online	Expense Amount: \$79.08
	Received Date: 5/12/2015	Payable Amount: \$79.08
	<a href="#">Upload Receipt(s)</a>	<a href="#">View Receipt(s)</a>
	<a href="#">Mark as Paid</a>	<a href="#">Remove Expense</a>
		<a href="#">Add Expense Note</a>
		<a href="#">Update Expense</a>

## HOW DO I VIEW MY CDH 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 lefthand 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.

**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 lefthand 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.

Last Login: 4/5/2017 - Online Justine Davis (0) Logout

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

Account Summary

Account Activity

Investments

**Claims**

Payments

**Claims** [Reset Filters](#)

**Account**

All Accounts

01/01/2017 - 12/31/2017

HRA

01/01/2016 - 12/31/2016

HRA

LPFSA

More Options ▾

**Claim Status**

All Claim Statuses

Denied

Paid

More Options ▾

**Receipt Status**

All Receipt Statuses

Not Needed

Overdue

More Options ▾

### Accounts / Claims

Date of Service	Account	Merchant/Provider	Claim Status	Amount
03/14/2017	HRA	Dr Smith	PTP Pending Receipt	\$200.00
03/13/2017	HRA	ABC Eye Clinic	PTP Pending Receipt	\$120.00
03/10/2017	HRA	Dr. Way	Pending Receipt	\$37.49
03/02/2017	HRA	Dr. Shaw	PTP Pending Receipt	\$20.00
03/01/2017	HRA	Dr. Johnson	Scheduled Reimbursement	\$130.00
02/14/2017	HRA	ABC Eye Specialists	PTP Pending Receipt	\$157.08
02/13/2017	HRA	ABC Clinic	Pending Receipt	\$15.00
01/18/2017	HRA	Dr. Moss	Pending Receipt	\$5.85
01/13/2017	HRA	Dr. Shaw	PTP Pending Receipt	\$10.00
01/10/2017	HRA	ABC Pharmacy	PTP Pending Receipt	\$7.00
01/06/2017	HRA	Dr.Sickle	Scheduled Reimbursement	\$48.90
12/21/2016	HRA	Vision Central	Scheduled Reimbursement	\$55.00
12/14/2016	HRA	ABC Clinic	Scheduled Reimbursement	\$120.00
12/13/2016	HRA	ABC Pharmacy	Scheduled Reimbursement	\$20.00
10/27/2016	HRA	pearle Vision	Scheduled Reimbursement	\$50.00
10/25/2016	HRA	Dr Smith	Scheduled Reimbursement	\$150.00
09/20/2016	HRA	Dr Smith	Scheduled Reimbursement	\$25.00
09/08/2016	HRA	Dr Jones	Scheduled Reimbursement	\$20.00
07/19/2016	HRA	Dr Smith	PTP Pending Receipt	\$20.00
07/08/2016	LPFSA	Great Dental	PTP Pending Receipt	\$67.09
07/06/2016	HRA	Great Labs	Pending Receipt	\$79.97
06/20/2016	HRA	Dr. Sickels	Pending Receipt	\$58.28
06/15/2016	HRA	All American Labs	PTP Pending Receipt	\$109.99
06/14/2016	HRA	North Clinic	PTP Pending Receipt	\$20.00
04/15/2016	LPFSA	North Clinic	Pending Receipt	\$26.90

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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.

Last Login: 4/5/2017 - Online Justine Davis (0) Logout

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

Account Summary **Accounts / Payments**

Account Activity

Investments

Claims

**Payments**

**Payments** [Reset Filters](#)

**Method**

[All Methods](#)

[Direct Deposit](#)

[Check](#)

More Options ▾

**Status**

[All Statuses](#)

[Paid](#)

[Paid to Provider](#)

More Options ▾

**Date**

[All Dates](#)

[2017](#)

[2016](#)

More Options ▾

Date ▾	Number	Method	Status	Amount
03/02/2017	170598de28e35	Direct Deposit	Paid	\$218.81
09/27/2016	16267bc57eef8	Direct Deposit	Paid	\$200.00
09/07/2016	16246f9e91834	Direct Deposit	Paid	\$50.00
07/28/2016	1620816636609	Direct Deposit	Paid	\$20.00
07/28/2016	0000035036	Check	Paid	\$10.00
07/28/2016	0000035035	Check	Paid to Provider	\$43.24
05/13/2016	16132cbb4c13f	Direct Deposit	Paid	\$150.00
05/06/2016	0000035030	Check	Paid to Provider	\$120.00
03/08/2016	0000035028	Check	Paid to Provider	\$65.00
03/08/2016	0000035025	Check	Paid	\$10.00
03/08/2016	0000035024	Check	Paid to Provider	\$25.00
03/08/2016	0000035022	Check	Paid to Provider	\$56.00
03/05/2016	0000080053	Check	Paid	\$175.43
12/31/2015	15363f852f772	Direct Deposit	Paid	\$200.00
12/31/2015	15363e213a8fe	Direct Deposit	Paid	\$25.00
12/31/2015	15363d48a7f9f	Direct Deposit	Paid	\$25.00
12/31/2015	15363cfdadaae	Direct Deposit	Paid	\$10.00
12/31/2015	15363c67f4681	Direct Deposit	Paid	\$10.00
12/31/2015	15363af35b747	Direct Deposit	Paid	\$10.00
12/31/2015	15363a7198116	Direct Deposit	Paid	\$10.00
12/31/2015	15363718380b	Direct Deposit	Paid	\$10.00
12/31/2015	15363229b3ae0	Direct Deposit	Paid	\$25.00
12/31/2015	1536316bb1c10	Direct Deposit	Paid	\$10.00
09/14/2015	152532c53f6c7	Direct Deposit	Paid	\$100.00
09/14/2015	0000035021	Check	Paid	\$25.00

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