

NECA-IBEW HRA BENEFITS PARTICIPANT PORTAL QUICKSTART GUIDE



Online Access to your Health Reimbursement Account (HRA) Information

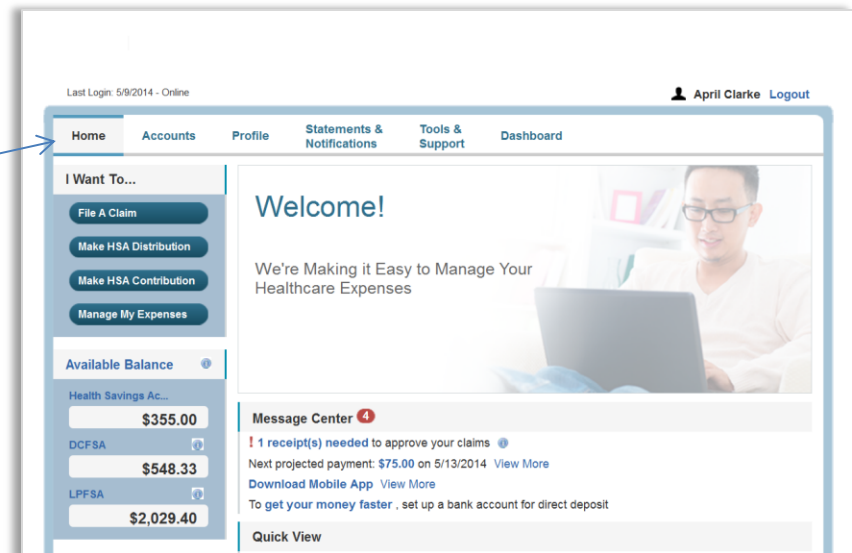
Welcome to your NECA-IBEW HRA Benefits Participant Portal. This website portal gives you 24/7 access to view information and manage your Health Reimbursement Arrangement (HRA) Account. It enables you to:

- 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 email address in your personal profile
- 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.

Please note that your participant portal has been customized for NECA-IBEW, and the screens shown in this manual may not represent the actual screens you will view in your portal.



HOW DO I LOG ON TO HOME PAGE?

1. Go to <https://necaibew.lh1ondemand.com>.
2. Enter your Login ID (your member number) in the Username field, or click the link to [Create your new username and password](#).
3. Follow the screen prompts to complete your account setup and to log in.

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 Participant 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 HRA Account. Click on the link to view the message.
- The **Quick View** section is not applicable to your login type.

You can also hover over the tabs at the top of the page.

The screenshot shows the participant portal home page for April Clarke. At the top right, it displays the user's name 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:

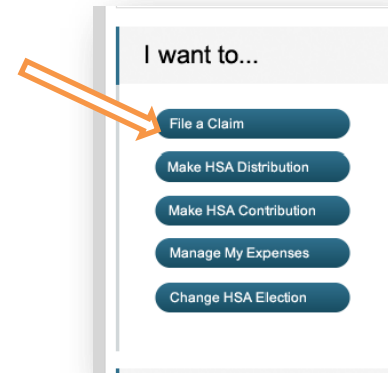
- I Want To...**: A vertical sidebar with buttons for 'File A Claim', 'Make HSA Distribution', 'Make HSA Contribution', and 'Manage My Expenses'.
- Available Balance**: A section showing account balances for 'Health Savings Ac...', 'DCFSA', and 'LPFSA'.
- Welcome!**: A large banner with the text 'We're Making it Easy to Manage Your Healthcare Expenses' and a background image of a man working on a laptop.
- Message Center**: A section with a red notification icon and the text '1 receipt(s) needed to approve your claims'. It also includes a 'Next projected payment' of \$75.00 on 5/13/2014 and a link to 'Download Mobile App'.
- Quick View**: A section at the bottom of the main content area.

Account Type	Available Balance
Health Savings Ac...	\$355.00
DCFSA	\$548.33
LPFSA	\$2,029.40

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 Fund Office, attaching the required receipt(s).
6. 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 Logout	
Receipts Needed							
Receipts Needed							
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status		
LPFSA	5/1/2014	Dr. Sickels	April Clarke	\$46.00	Required	Upload Receipt View Confirmation	
DCFSA	2/1/2014 - 2/28/2014	Mrs. Smith's Daycare	Cindy Clarke	\$290.00	Overdue	Upload Receipt View Confirmation	
Receipts Uploaded and Awaiting Approval							
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status		
LPFSA	1/31/2014	Dr. Dental	April Clarke	\$257.00	Uploaded	Upload Receipt View Confirmation	

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 detail.

Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Plan Year Balance	Available Balance
Health FSA	<u>\$1,100.00</u>	<u>\$185.07</u>	<u>\$108.20</u>	\$16.87	\$60.00	\$974.93	<u>\$974.93</u>
HRA 2013	<u>\$416.66</u>	<u>\$0.00</u>	<u>\$0.00</u>	\$0.00	\$0.00	\$416.66	<u>\$416.00</u>
Incentive Account	<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 healthcare expense activity, use the **DASHBOARD**

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

The screenshot shows the WEX 1View Dashboard interface. At the top, there are navigation tabs: Home, Accounts, Profile, Statements & Notifications, Tools & Support, and Dashboard. The Dashboard tab is active, showing an 'Expense Summary' table with columns for Total Healthcare Expenses (\$1,222.49), Total Paid Expenses (\$215.75), and Total Unpaid Expenses (\$1,006.74). Below this is a table of individual expenses with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status. A left-hand navigation pane contains filter options for 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, Cindy Clarke, More Options), and Merchant/Provider (All Merchants/Providers, Dr. Sickels, Dr. Dental, More Options). A search bar is located at the bottom of the navigation pane.

HOW DO I VIEW AN EXISTING CLAIM IN THE DASHBOARD?

1. You can view 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 and then click on the Claim Number.

The screenshot displays the WEX Evolution Dashboard. At the top, there are navigation tabs: Home, Accounts, Profile, Statements & Notifications, Tools & Support, and Dashboard (which is selected). A user profile dropdown labeled 'I Want to...' is visible in the top right. Below the navigation, there are two main buttons: 'Add Expense' and 'Export Expenses'. A sidebar on the left contains filters for 'Expense' (All Expenses, Dependent Care, Medical, More Options) and 'Status' (All Statuses, Unpaid, Ineligible, Pending, Partially Paid, Paid). The main content area is titled 'Dashboard' and includes a 'View Non-Healthcare' link. An 'Expense Summary' section shows: Total Healthcare Expenses: \$857.49, Total Paid Expenses: \$140.75, and Total Unpaid Expenses: \$716.74. Below this, a 'Total Eligible to Submit' section shows \$340.89. A table lists expense items with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status. One item is shown: 05/01/2014, Dental, Cindy Clarke, Dental Services Inc., \$59.20, and Unpaid. An 'Expense Details' section for this item provides further information: Description: Dental Treatment, Date(s) of Service: 6/1/2014, Source: Online, Expense Amount: \$59.20, Received Date: 6/3/2014, and Payable Amount: \$59.20. Action buttons include 'Add Expense Note', 'Mark as Paid', 'Remove Expense', and 'Update Expense'. A 'Pay' button is also present next to the expense item.

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, 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 UPDATE MY PERSONAL PROFILE?

1. On the **Home Page**, under the **Profile** tab, click your choice on the drop-down menu: **Profile** or **Banking/Cards**.
2. Click **Update Profile** on the Profile screen. Some profile changes will require you to answer an additional security question.
3. The only profile information that can be added/modified is the Email Address. Please note that once you add an email address, you automatically consent to receive all printed communications via email. All communications are also available to view on the Participant Portal/Statements & Notifications.
4. Click **Submit**.

HOW DO I GET MY REIMBURSEMENT FASTER?

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

1. On the **Home Page**, click the **Tools & Support** tab, and locate **Direct Deposit Form** link. Download the form, complete it and mail to NECA-IBEW. This form can also be completed on-line and then printed and mailed to NECA-IBEW.

NECA-IBEW Welfare Trust Fund
Attn.: HRA Claims Processor
2120 Hubbard Ave
Decatur, IL 62526

HOW DO I CHANGE MY PASSWORD?

1. Your password can be reset during your initial account setup.
2. To change a password after that, call NECA-IBEW at 1-800-765-4239 and ask for the IT Department.

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.
3. You can also click Update Notification Preferences to set up the receipt of alerts on your mobile device.

...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts** tab, click **Account Summary** on the drop-down menu.
2. Click Health Reimbursement Account in the first column on the left and the applicable **Plan Rules** will open in another browser window

OR

On the **Tools & Support Page**, under the **Plan Summaries** tab, click a document in the list for more detailed information.