

Consumer Portal QuickStart Guide



Log on to the Home Page

Go to www.combinedservices.com. Go to **FSA & HRA Participants**.

- Click the Login link. (A new page will open).
- Click **Login**.

First Time Login:

- Click Create your new username and password link.
- You will need to enter, your first name, last name, zip code and SSN.
- You will come up with 5 security questions.
- You will be assigned a username and you can create a password.



Navigating the Home Page

Welcome

- The top section of the home page has menu options to navigate the Consumer Portal. You can dig into account details, update your Consumer Portal profile, and review notifications and forms that pertain to your account.

I Want To...

- To assist in getting you to the most common tasks, the **I Want To...** section on the left of the home page contains the most frequently used options within the consumer portal.

Available Balance

- On left side of the home page you can see your current **Available Balance(s)** for each account.
- For all Account Activity, click on the **Available Balance** link (in blue) to bring you to the **Account Summary** page. There you may select the underlined dollar amounts for more detail.
 - For example, click on the amount under **Eligible Amount** to view enrollment detail.

Message Center

- The Message Center section displays alerts and relevant links that enable you to keep current on your accounts.
- If you add/update your email address on your profile, you will receive email alerts when you have a message. Examples of the messages are:
 - Posted Claim Notification
 - Request for Documentation
 - Direct Deposit Notification
 - Request for Repayment



Quick View

- The Quick View section graphically displays some of your key account information.



File a Claim, Upload Receipts

- On the **Home Page**, under the **I Want To...** section, click the **File A Claim** button.
- Enter your claim information and upload required documentation on the form that appears. Click **Add Claim**. The claim is then added to the **Claims Basket**.
- To submit additional claims, click **Add Another Claim**. Select the Account Type and complete the form, upload required documentation and click **Add Claim**.
- Go to the **Claims Basket** when you have loaded all your claims. Click **Submit** to send the claims for processing.
- The **Claim Confirmation** page displays. Print the **Claim Confirmation** for your tax records.
- If you did not upload a receipt, print another **Claim Confirmation Form** to submit to Combined Services LLC, attaching the required documentation.
- **If** additional documentation is required, you will see the **Upload Receipt** link. Click on it and the **Receipts Needed** screen displays.
- For each claim that requires documentation, click **Upload Receipt** on the far right and follow instructions. (Your documentation must be in .doc, pdf, bmp, or gif format.)
- The **Receipt Uploaded** confirmation appears: "Your receipt has been uploaded..."
- After uploading, you may also click **View Confirmation** and print the form for your records.

Notification - Request for Documentation

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	NOTIFICATIONS	FORMS	LINKS	Spear Mint ▾ Logout
Receipts Needed						
Receipts Needed						
Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status	
MedFlex FSA	12/20/2011	Stillwater Medical Group	Spear Mint	\$10.00	Required	Upload Receipt View Confirmation
HRA	1/12/2012	Target	Spear Mint	\$5.00	Required	Upload Receipt View Confirmation

Click **Upload Receipt** to submit additional documentation.

Get Reimbursement Money FASTER

The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Be sure that your employer is offering direct deposit setup online.

- On the **Home Page**, under the **Accounts** tab, click **Change Payment Method** on the drop-down menu.
- Select **Direct Deposit** and click **Change Payment Method**. The **Add Bank Account: Direct Deposit Setup** page displays.
- Enter your bank account information, and click **Submit**.
- The **Payment Method Changed** confirmation displays.

View Reimbursement History

- 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.
- Click **View Detail** on the far right to see claim details.

Change Login or Password

- On the **Home Page**, under the **Profile** tab, click **Login Information** on the drop-down menu.
- 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).
- Click **Save**.

Update Personal Profile

- On the **Home Page**, under the **Profile** tab, click your choice on the drop-down menu: **Profile Summary** or **Bank Accounts**.
- Click any link on the Profile screen: **Update Profile** or **Add/Update Dependent** or **Update Bank Account**. Some profile changes require you to answer an additional security question.
- Complete your changes in the form. Click **Submit**.

Add/Update Your Email in Profile Summary

Add or update your email in **Profile Summary**. Providing an email improves communication.

- It's **FAST** - You will get email alerts when you have a pending notification as soon as it's available. No more waiting for the postman to deliver it.
- It's **GREEN** - Reading notifications on your secure portal rather than a printed document saves trees, ink and fuel.
- It's **SECURE** - The email alert will let you know when you should log into your secure consumer portal account.

Have Questions?

Our Flex Benefit Team is here to support you:

Monday - Friday
8:00am to 4:30pm

Call Us: 1 888 227-9745 ext. 2040 or

Email: flexiblebenefits@combinedservices.com