

# CONSUMER PORTAL QUICKSTART GUIDE

## FLEXIBLE SPENDING ACCOUNT



The **J.P. Farley Benefit Accounts Consumer Portal** is your one-stop portal gives you 24/7 access to view information and manage your Flexible Spending Account (FSA).

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
- Update your personal profile information
- 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, or
2. Hover over or click on the four tabs at the top.

### ONLINE FSA RESOURCES

Visit J.P. Farley's website at [www.jpfarley.com/learn-about-hsa-fsa.php](http://www.jpfarley.com/learn-about-hsa-fsa.php) for additional flexible spending account resources.

### FSA APP

Access your Flexible Spending Account on the go! Our easy, convenient app provides quick access to FSA account balances 24/7, claims submissions, and more!

In the iOS or Android store download the app called: **J.P. Farley FSA HRA HSA**



## HOW DO I LOG ON TO HOME PAGE?

1. Go to <https://jpfarley.lh1ondemand.com/> for direct access to your flexible spending account tools.
2. Enter your login ID and password.  
*(If you do not receive your username and password in a separate mailing, follow the prompts to set up a New User Account. You will need use your first and last name, zip code, and social security number to do this.)*
3. Click **Login**.

The **Home Page** is easy to navigate:

- Easily access the **Available Balance** and **“I Want To”** sections to work with your accounts right away.
- The **I Want To...**section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to your Accounts, Investments, and Profile.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Healthcare Savings Goal** section graphically displays your HSA savings goals progress.
- The **Recent Transaction** section displays the last 3 transactions on your account(s).
- 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.

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	BUDGET
6/28/2021	Medical	Cherokee Blankenship...	Delta Dental	\$18.78	\$

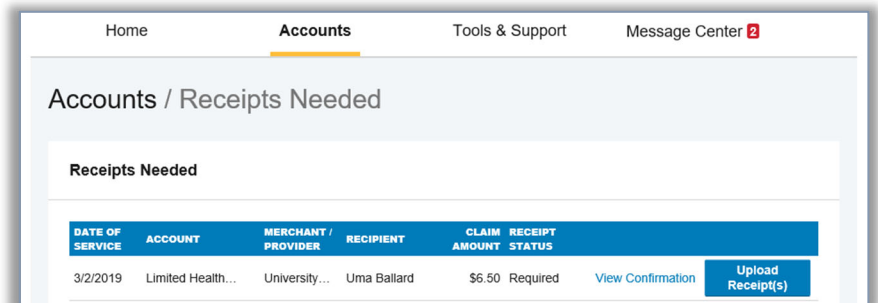
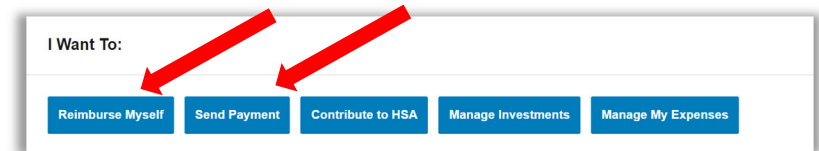
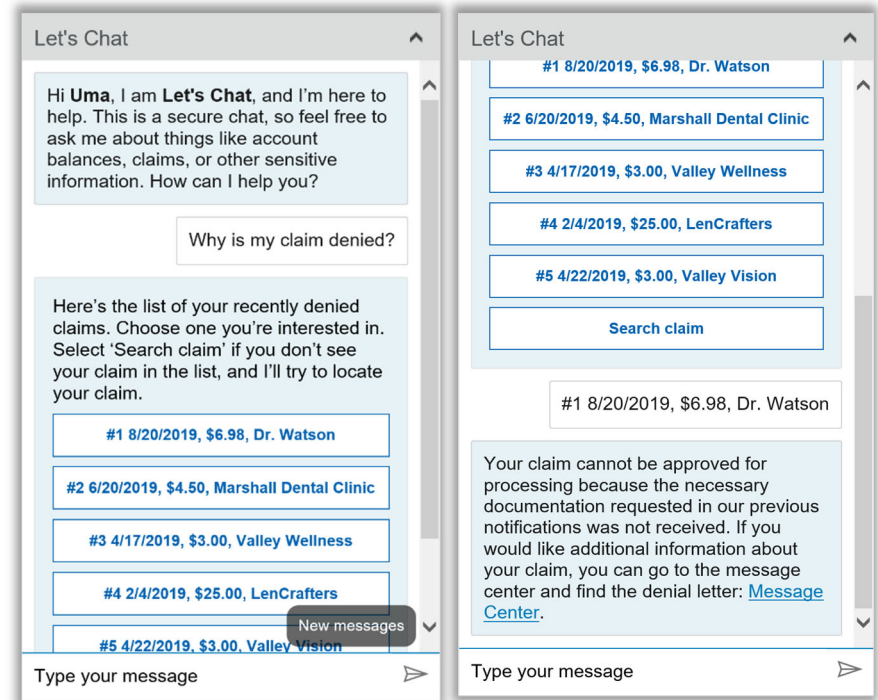
## HOW DO I GET ASSISTANCE WITH MY CLAIM?

1. From any page you can open the Let's Chat window from the bottom right icon.
2. Asking about claim denial or claims needing receipt will prompt the chat window to help you review your claims and find where you can attach receipts.

## HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

3. On the **Home Page**, you may simply select **"Reimburse Myself"** or **"Send Payment"** under the "I want to..." section, **OR** from any page on the portal, expand the **Accounts** tab on the top of the screen.
4. The claim filing wizard will walk you through the request including entry of information, payee details and uploading a receipt.
5. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
6. When all claims are entered in the **Transaction Summary**, agree to the terms and conditions click **Submit** to send the claims for processing.
7. 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 Tasks 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 or use one of your **Mobile Quick Receipts**.



## HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.
2. For all Account Activity, click on the **Accounts** tab 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.

HEALTH SAVINGS ACCOUNT		01/01/2018 - 12/31/2018	
	AVAILABLE		AVAILABLE
<a href="#">Cash Account</a>	\$2,012.50	<a href="#">Limited Health Care Flex...</a>	\$2,445.95
<a href="#">Advance</a>	\$0.00	<a href="#">Dependent Care Flexible...</a>	\$1,918.30
<a href="#">Investment Account</a>	\$795.00	<a href="#">Parking Reimbursement...</a>	\$1,280.00
<b>Available to spend</b> Includes Advance	<b>\$2,807.50</b>		

Contact Us | Uma Ballard | (0) | Logout

Home | **Accounts** | Tools & Support | Message Center

### Accounts / Account Summary

The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. [View More](#)

**Health Savings Account**

**TOTAL AVAILABLE BALANCE \$5,153.00**

AVAILABLE CASH BALANCE \$4,050.00      INVESTMENT BALANCE \$1,103.00 \* Current as of 3/13/2019

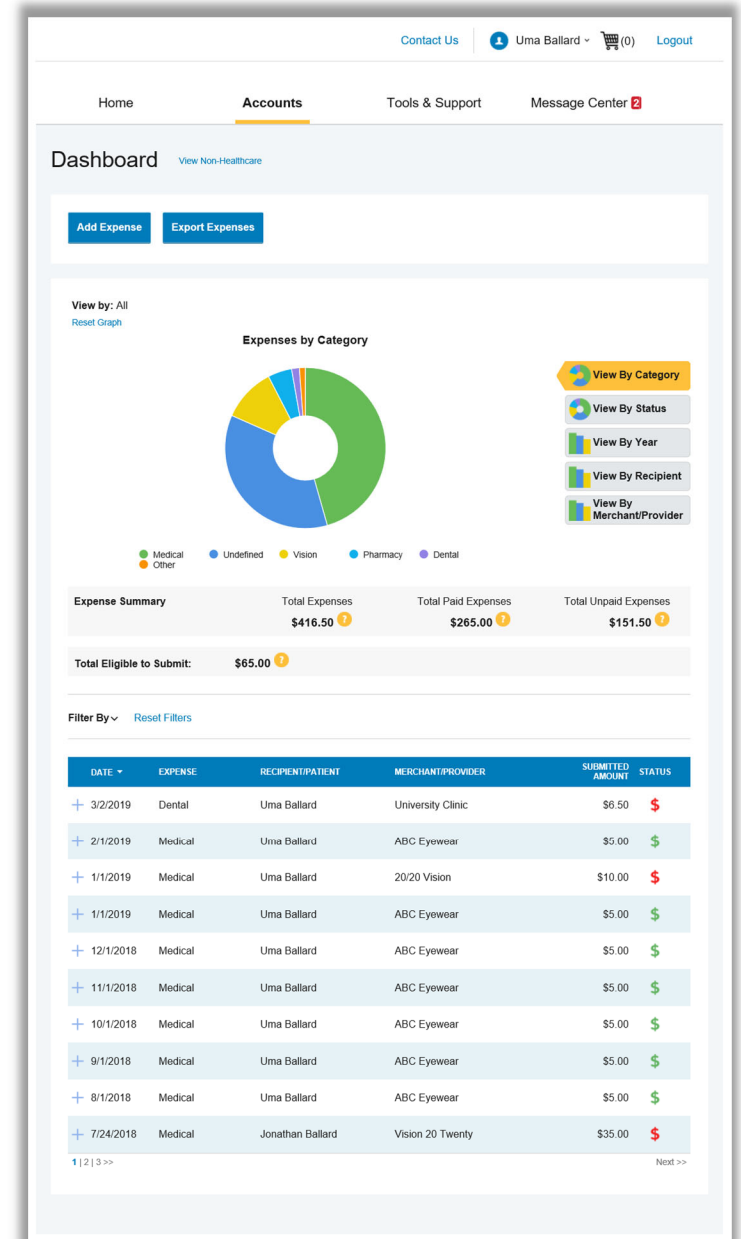
01/01/2019 - 12/31/2019      ESTIMATED PER PAY PERIOD DEDUCTION: \$1,161.66

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## ALL HEALTH CARE EXPENSE ACTIVITY IN ONE PLACE

To view and manage ALL healthcare expense activity from EVERY source, use the Dashboard

1. Under the **Accounts** menu is the **Dashboard**. The **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. Expenses can be exported into an Excel spreadsheet by clicking on the **Export Expenses** button on the top of the page.



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

1. From the **Dashboard** click on the **Add Expense** button on the top 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.

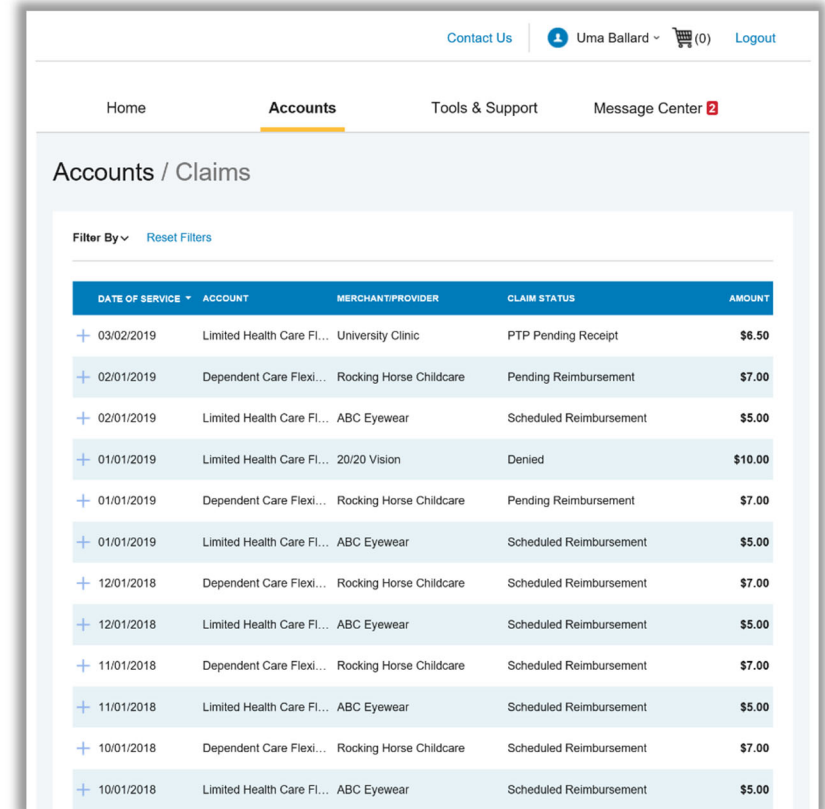
The screenshot displays the WEX dashboard interface. At the top, there are navigation links for 'Contact Us', 'Uma Ballard', a shopping cart icon with '(0)', and 'Logout'. Below this is a secondary navigation bar with 'Home', 'Accounts', 'Tools & Support', and 'Message Center'. The main content area is titled 'Dashboard' and includes a 'View Non-Healthcare' link. Two prominent buttons, 'Add Expense' and 'Export Expenses', are visible. A red arrow points to the 'Add Expense' button. Below the buttons is a 'View by: All' section with a 'Reset Graph' link. The 'Expenses by Category' section features a donut chart and a legend with categories: Medical Other, Undefined, Vision, Pharmacy, and Dental. To the right of the chart are several filter options: 'View By Category', 'View By Status', 'View By Year', 'View By Recipient', and 'View By Merchant/Provider'. An 'Expense Summary' table shows: Total Expenses: \$416.50, Total Paid Expenses: \$265.00, and Total Unpaid Expenses: \$151.50. Below this, 'Total Eligible to Submit' is listed as \$65.00. A 'Filter By' dropdown and 'Reset Filters' link are also present. The bottom section is a table of expenses with columns for DATE, EXPENSE, RECIPIENT/PATIENT, MERCHANT/PROVIDER, SUBMITTED AMOUNT, and STATUS.

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
+ 3/2/2019	Dental	Uma Ballard	University Clinic	\$6.50	\$
+ 2/1/2019	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
+ 1/1/2019	Medical	Uma Ballard	20/20 Vision	\$10.00	\$
+ 1/1/2019	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
+ 12/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
+ 11/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
+ 10/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
+ 9/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
+ 8/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
+ 7/24/2018	Medical	Jonathan Ballard	Vision 20 Twenty	\$35.00	\$

## 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 top 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 top 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.

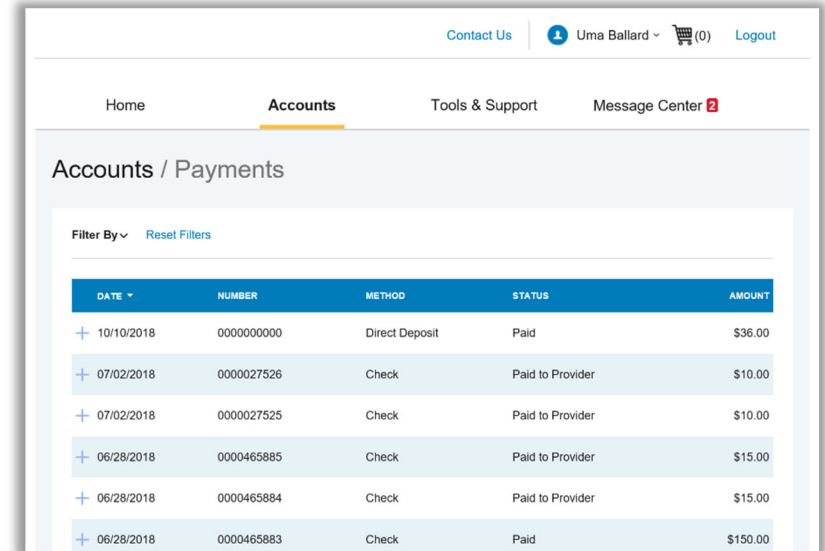


The screenshot shows the 'Accounts / Claims' page in a web application. At the top, there are navigation links for 'Home', 'Accounts' (which is highlighted), 'Tools & Support', and 'Message Center' with a notification icon. The page title is 'Accounts / Claims'. Below the title, there is a 'Filter By' dropdown menu and a 'Reset Filters' link. The main content is a table with the following columns: 'DATE OF SERVICE', 'ACCOUNT', 'MERCHANT/PROVIDER', 'CLAIM STATUS', and 'AMOUNT'. The table contains 12 rows of data, each with a plus sign icon to its left, indicating that the rows are expandable. The data in the table is as follows:

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 03/02/2019	Limited Health Care Fl...	University Clinic	PTP Pending Receipt	\$6.50
+ 02/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 02/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 01/01/2019	Limited Health Care Fl...	20/20 Vision	Denied	\$10.00
+ 01/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 01/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 12/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 12/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 11/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 11/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 10/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 10/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00

## 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.

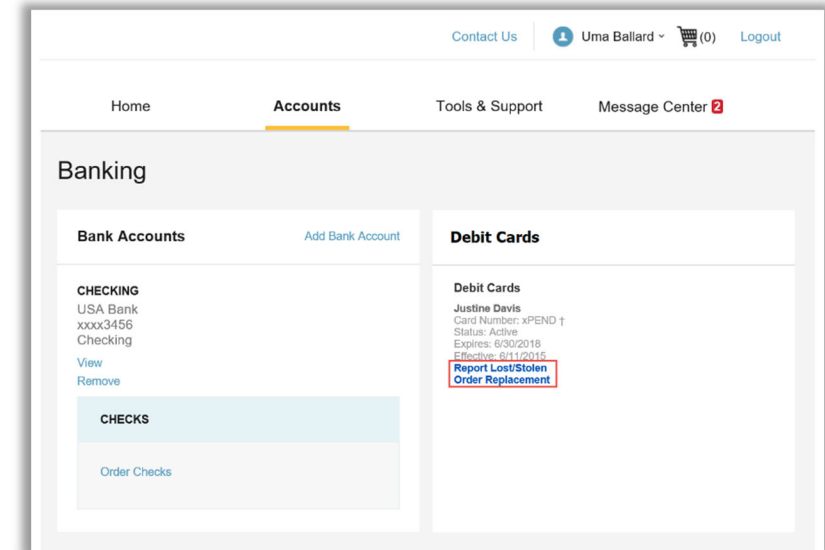


The screenshot shows the 'Accounts / Payments' page. At the top, there are navigation links: Home, Accounts (selected), Tools & Support, and Message Center (with a notification icon). Below the navigation is a 'Filter By' dropdown and a 'Reset Filters' link. The main content is a table with the following columns: DATE, NUMBER, METHOD, STATUS, and AMOUNT. The table contains six rows of transaction data.

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 10/10/2018	0000000000	Direct Deposit	Paid	\$36.00
+ 07/02/2018	0000027526	Check	Paid to Provider	\$10.00
+ 07/02/2018	0000027525	Check	Paid to Provider	\$10.00
+ 06/28/2018	0000465885	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465884	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465883	Check	Paid	\$150.00

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

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.

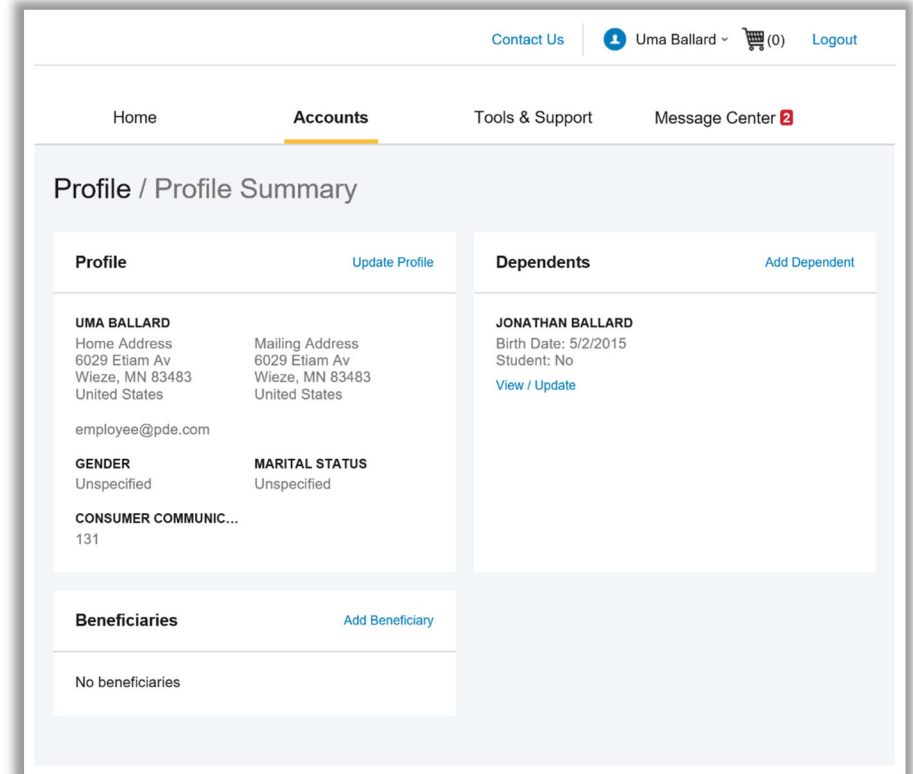


The screenshot shows the 'Banking' page. At the top, there are navigation links: Home, Accounts (selected), Tools & Support, and Message Center (with a notification icon). Below the navigation is a 'Bank Accounts' section with an 'Add Bank Account' link. Under 'Bank Accounts', there is a 'CHECKING' section for USA Bank with account number xxxx3456. Below this, there are 'View' and 'Remove' links, and a 'CHECKS' section with an 'Order Checks' link. To the right, there is a 'Debit Cards' section for Justine Davis with card number xPEND. Below this, there is a 'Report Lost/Stolen' link and an 'Order Replacement' link, both highlighted with a red box.



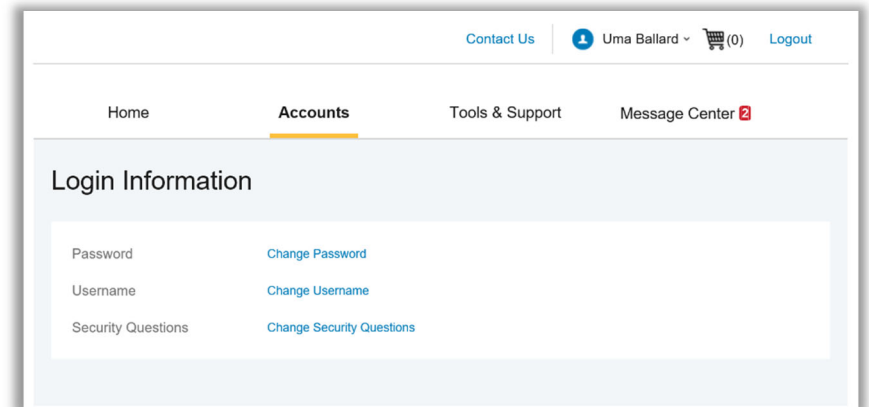
## HOW DO I UPDATE MY PERSONAL PROFILE?

1. From the **Home Page**, under the **Accounts Tab**, you will find links to update profile information including profile summary details, dependents, and beneficiaries.
2. Click the appropriate link under Profile for your updates: **Update Profile** or **Add/Update Dependent** or **Add Beneficiary**. 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. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
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. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

### ...NOTIFICATIONS?

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.

### ...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts Tab**, you will be directed to the **Account Summary** page
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.  
**OR** from the **Home Page**, under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.

The screenshot shows the 'Message Center' page. At the top, there are navigation tabs: Home, Accounts, Tools & Support, and Message Center (which is highlighted). Below the tabs, there are links for 'Update Notification Preferences' and 'View Statements'. The main content area is titled 'Current Messages' and contains a table of messages. Each message row includes a checkbox, a date/time, a 'FROM' field, a 'SUBJECT' field, and an 'ATTACHMENT' field.

DATE/TIME	FROM	SUBJECT	ATTACHMENT
3/5/2019 8:15 AM	Auto-genera...	HSA Account Summary (2/1/2019 - 2/28/...	HSA Account Summary (2/1/2019 - 2/28/...
2/5/2019 10:06...	Auto-genera...	HSA Account Summary (1/1/2019 - 1/31/...	HSA Account Summary (1/1/2019 - 1/31/...
1/12/2019 1:08 AM	Auto-generated	1099-SA (2018)	1099-SA (2018)
1/4/2019 7:20 AM	Auto-generated	HSA Account Summary (12/1/2018 - 12/31...	HSA Account Summary (12/1/2018 - 12/31...
12/5/2018 9:54 AM	Auto-generated	HSA Account Summary (11/1/2018 - 11/30...	HSA Account Summary (11/1/2018 - 11/30...
11/5/2018 3:11 PM	Auto-generated	HSA Account Summary (10/1/2018 - 10/31...	HSA Account Summary (10/1/2018 - 10/31...
10/10/2018 12:00 AM	Auto-generated	Advice of Deposit	Advice of Deposit

The screenshot shows the 'Accounts / Account Summary' page. It features a navigation bar with Home, Accounts (highlighted), Tools & Support, and Message Center. Below the navigation, there is a message about varying information based on healthcare benefits. The main section is titled 'Health Savings Account' and displays a summary of balances:

<b>TOTAL AVAILABLE BALANCE</b>	<b>\$5,153.00</b>
AVAILABLE CASH BALANCE	INVESTMENT BALANCE
\$4,050.00	\$1,103.00 * Current as of 3/13/2019

Below the balances, there is a section for '01/01/2019 - 12/31/2019' with an 'ESTIMATED PER PAY PERIOD DEDUCTION: \$1,161.66'. This section contains a table with columns for ACCOUNT, ELIGIBLE AMOUNT, SUBMITTED CLAIMS, PAID, PENDING, DENIED, and AVAILABLE BALANCE.

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00