

PARTICIPANT HOW TO GUIDE

Welcome to your ALERAPAY Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Reimbursement Account

- 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 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,
2. Hover over or click on the six tabs at the top.

HOW DO I LOG ON TO HOME PAGE?

1. Go to <https://aleraedge.aleragroup.com/> and select any login button (NOTE: If using Google Chrome, please clear cookies before proceeding)
2. Select *AleraPay Participant*
3. Select *AleraPay* again and you will be redirected to the consumer portal login page
4. Enter your Username and Password and click the Login button

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 the Account Summary page, where you can see and manage your accounts.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- 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.

Home Dashboard Accounts Tools & Support Profile Message Center 3

Welcome!
We're Making it Easy to Manage Your Healthcare Expenses.

I Want To:

File A Claim Make HSA Transaction Manage Investments Manage My Expenses

Accounts

HEALTH SAVINGS ACCOUNT

	AVAILABLE
Cash Account	\$2,012.50
Advance	\$0.00
Investment Account	\$795.00
Available to spend Includes Advance	\$2,807.50

01/01/2018 - 12/31/2018

	AVAILABLE
Limited Health Care Flex...	\$2,445.95
Dependent Care Flexible...	\$1,918.30
Parking Reimbursement...	\$1,280.00

Tasks 2

Next Projected Payment: \$30.00 on 9/25/2018 | View More

Limited Health Care Flexible Spending Account	\$9.00
Dependent Care Flexible Spending Account	\$16.00
Parking Reimbursement Account	\$6.00

To get your money faster, set up a bank account for direct deposit.

Healthcare Savings Goal

33%

\$2,808 of \$8,500

EDIT GOAL

Recent Transactions

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
9/1/2018	Medical	Amity Anderson	ABC Ortho	\$3.00	\$
9/1/2018	Dependent Care	Amity Anderson	ABC Daycare	\$5.00	\$
9/1/2018	Commuter	Amity Anderson	Ramp 2	\$2.00	\$

[View full table](#)

Quick View

Paid Claims by Category

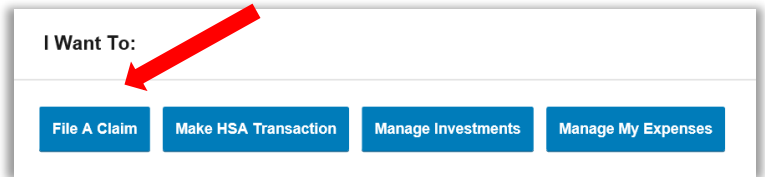
Child	\$150.00
Vision	\$130.00
Dental	\$51.00
Unspecified	\$14.05
Transportation - P	\$14.00

Election Summary
01/01/2018 - 12/31/2018

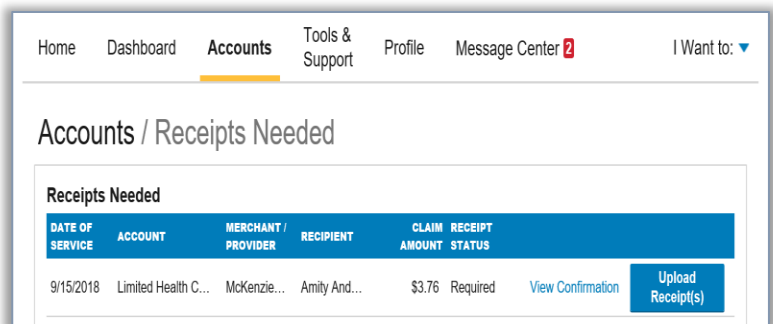
Dependent Care...	\$5,000.00
Parking Reimburs...	\$3,120.00
Limited Health Ca...	\$2,650.00

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, **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 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. Simply click to expand the line item to view claim details and the **upload receipts link**.



HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.

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

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.

Home Dashboard **Accounts** Tools & Support Profile Message Center 3 I Want to ▾

Accounts / Account Summary

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

Health Savings Account

AVAILABLE CASH BALANCE	INVESTMENT BALANCE	TOTAL AVAILABLE BALANCE
\$2,012.50	\$795.00 <small>* Current as of 9/21/2018</small>	\$2,807.50

ADVANCE BALANCE	ADVANCE REPAYMENT BALANCE
\$0.00	\$0.00

01/01/2018 - 12/31/2018 Estimated Per Pay Period Deduction: \$897.49

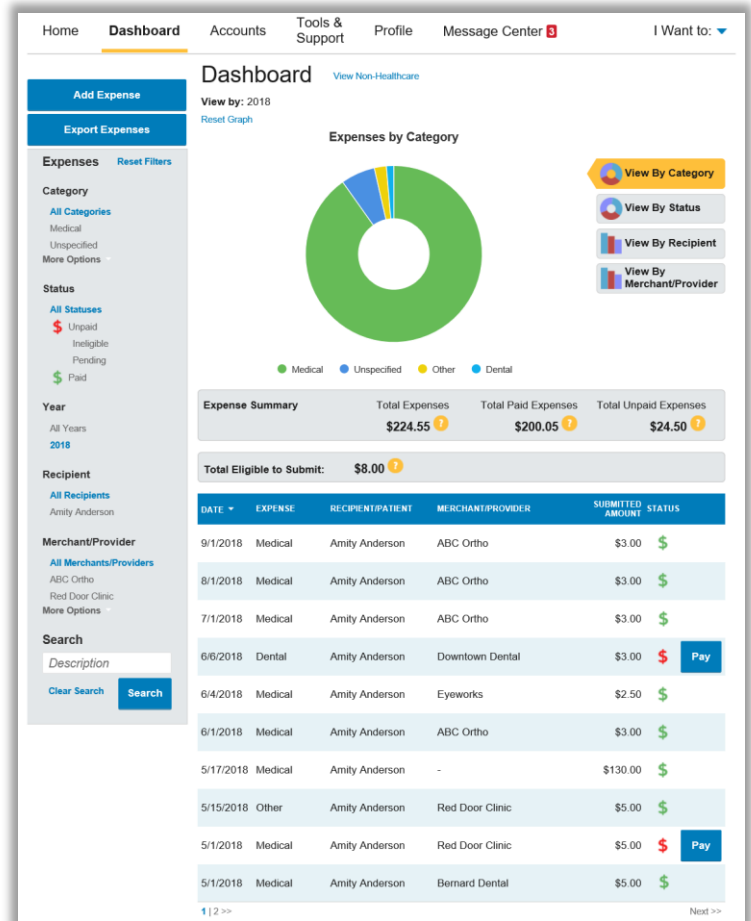
ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
Limited Health Care Flexible Spending Account	\$2,850.00	\$211.55	\$195.05	\$9.00	\$7.50	\$2,445.95
Dependent Care Flexible Spending Account	\$5,000.00	\$165.00	\$150.00	\$15.00	\$0.00	\$1,918.30
Parking Reimbursement Account	\$3,120.00	\$20.00	\$14.00	\$6.00	\$0.00	\$1,280.00

Pay check deductions are based on your election and the number of scheduled pay periods within the plan year.

ALL HEALTH CARE EXPENSE ACTIVITY IN ONE PLACE

To view and manage ALL healthcare expense activity use the Dashboard

1. On the **Home Page**, under the **Dashboard** tab. The **Dashboard** provides you with an easy-to-use consolidated view of healthcare expenses for ongoing management of medical claims.
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 VIEW CLAIMS HISTORY?

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 left-hand 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 left-hand 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.

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
09/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
09/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
09/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
08/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
08/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
08/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
07/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
07/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
07/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
06/04/2018	Limited Health Care Flexible Spending Account	Eyeworks	Denied	\$2.50
06/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Paid	\$5.00
06/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Paid	\$3.00
06/01/2018	Parking Reimbursement Account	Ramp 2	Paid	\$2.00
05/17/2018	Limited Health Care Flexible Spending Account	-	Paid	\$130.00
05/01/2018	Parking Reimbursement Account	-	Paid	\$5.00
05/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Paid	\$5.00
05/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Paid	\$3.00
05/01/2018	Parking Reimbursement Account	Ramp 2	Paid	\$2.00
05/01/2018	Limited Health Care Flexible Spending Account	Bernard Dental	Denied	\$5.00
04/20/2018	Dependent Care Flexible Spending Account	-	Paid	\$120.00

HOW DO I VIEW PAYMENT 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. The left sidebar has 'Payments' highlighted. The main table lists transactions with columns for DATE, NUMBER, METHOD, STATUS, and AMOUNT.

DATE	NUMBER	METHOD	STATUS	AMOUNT
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
06/28/2018	0000465881	Check	Paid to Provider	\$5.00
06/28/2018	0000465879	Check	Paid to Provider	\$7.00
06/28/2018	0000465867	Check	Paid to Provider	\$5.00
06/28/2018	0000000000	Direct Deposit	Paid	\$24.00
06/28/2018	0000000000	Direct Deposit	Paid	\$3.00

HOW DO I UPDATE MY PERSONAL PROFILE?

1. From the **Home Page**, under the **Profile**, you will find links to update profile information including profile summary details, dependents, and beneficiaries.
2. Click the appropriate link on the Profile screen 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**.

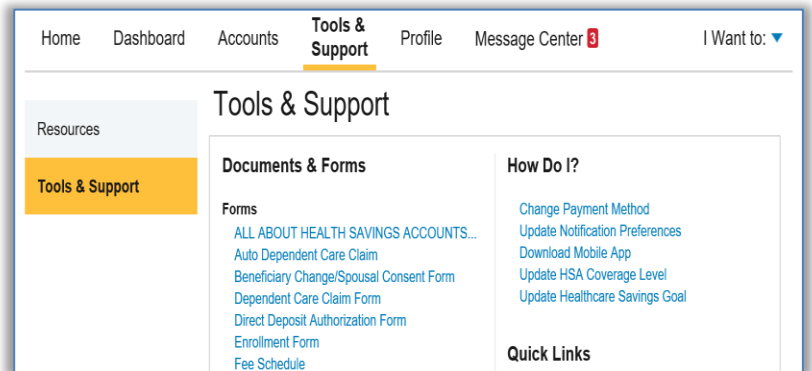
The screenshot shows the 'Profile / Profile Summary' page. The left sidebar has 'Profile' highlighted. The main content area displays personal information for Amity Anderson, including home and mailing addresses, email, gender, marital status, and consumer communication ID.

Profile	Update Profile	Dependents	Add Dependent
<p>Amity Anderson Home Address 670-2992 Orci Rd Los Vilos, MN 82588 United States</p> <p>Mailing Address 670-2992 Orci Rd Los Vilos, MN 82588 United States employee@pde.com</p> <p>Gender Unspecified</p> <p>Consumer Communication ID 135</p>		No dependents	Add Beneficiary
		No beneficiaries	

HOW DO I GET MY REIMBURSEMENT FASTER?

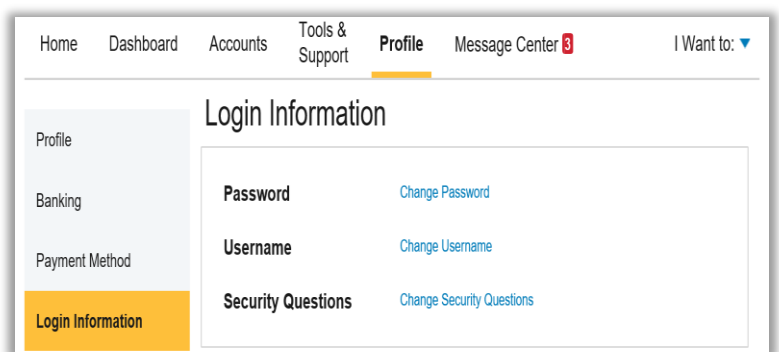
The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit setup online.

1. From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the “**How DO I**” section
2. Select the **Primary Payment Method** and/or **Alternate Payment Method** click **Submit**. The **Add Bank Account: Direct Deposit Setup** page displays.
3. Enter your bank account information and click **Submit**.
4. The **Payment Method Changed** confirmation displays.



HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Profile** tab, and click **Login Information** on the left-hand navigation bar.
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**.



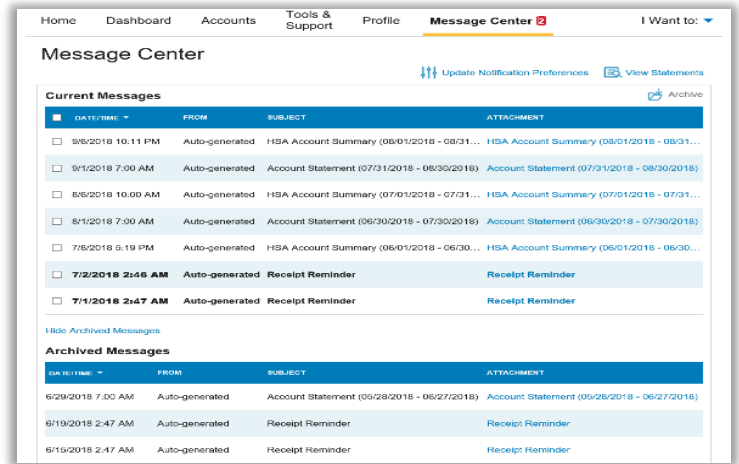
HOW DO I VIEW OR ACCESS:

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** tab, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.

