



# MOBILE APP CONSUMER GUIDE

## Welcome

### to your **Child Care Providers United (CCPU) Reimbursement Consumer App.**

This one-stop app gives you 24/7 access to view information and all of your reimbursement requests and documents.

It enables you to:

- File a reimbursement online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, reimbursement request history and payment history
- Report a lost/stolen Card and request a new one
- Change your login ID and/or password
- Download plan information, forms and notifications

The app is designed to be simple and convenient.

You can easily navigate this site in two ways:

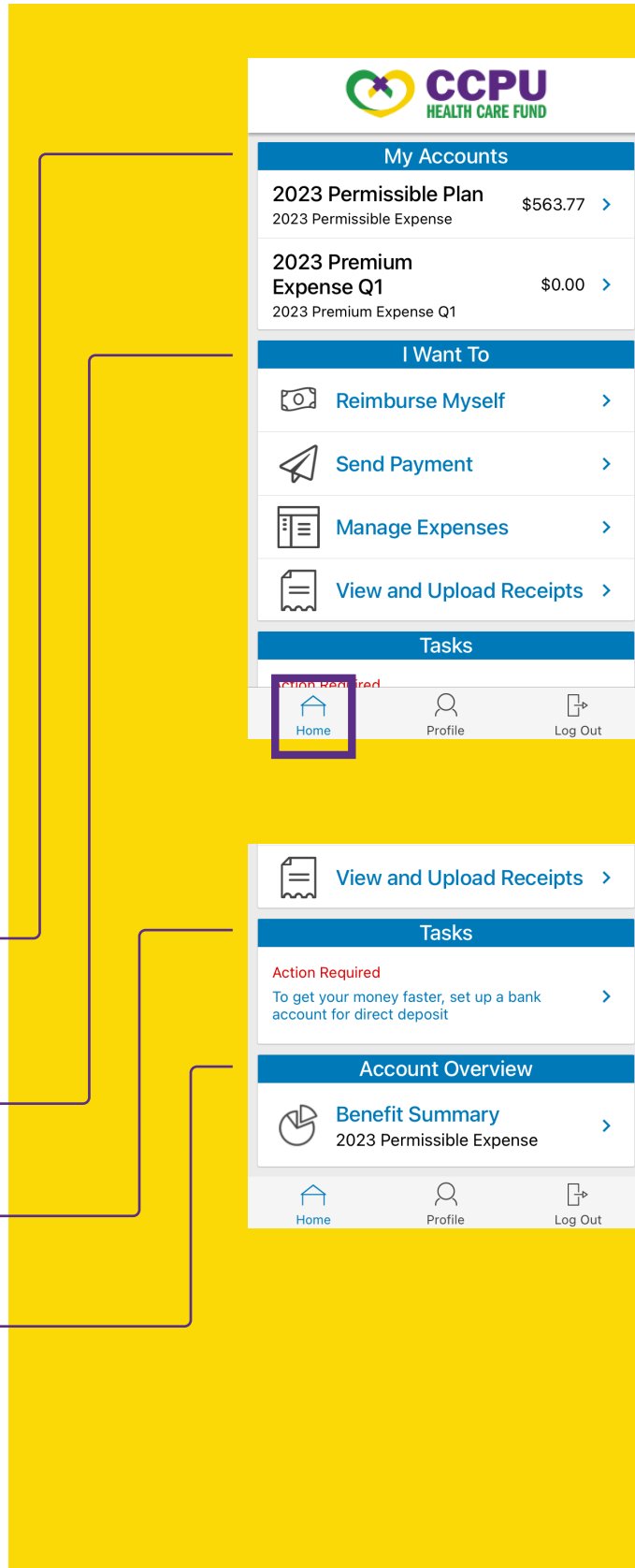
1. Work from sections within the Home Page, or
2. Click on the tabs at the bottom.

## HOW DO I LOG ON TO THE HOME PAGE?

1. Download the CCPU Health app from the app store. It is available for both Android and Apple phones.
2. Enter your login ID and password (both provided by CCPU Health Care Reimbursement Fund).
  - a. Your username is your CCPU Health Care Reimbursement Fund ID. This can be found on the Welcome Letter you received. It begins with a "U".
  - b. Your password is your first name initial, your last name, and your date of birth (DDMMYY).  
i.e., If your name is Mark Garcia and your date of birth is Jan. 2, 1993, then your password is **MGarcia010293**.
3. Click **Login**.

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

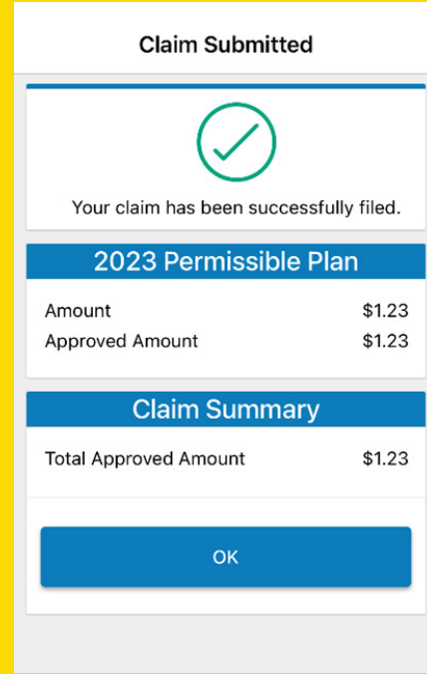
- Easily access the **Available Balance** and **I Want To** section to work with your accounts right away.
- The **My Accounts** section links to your Accounts showing Account Details and Account Activity.
- The **I Want To** section contains the most frequently used features for the Consumer Portal.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Account Overview** section contains graphs of some of your key account information.




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

1. On the **Home Page**, you may simply select **Reimburse Myself** or **Send Payment** under the **I Want To** section.
2. The reimbursement claim filing wizard will walk you through the request, including entry of information, payee details and uploading a receipt.

**NOTE:** To view and upload receipts, go to **View and Upload Receipts** under the **I Want To...** section. You may also click on the applicable account under the **My Accounts** section. Under the **Account Activity** section, click on the corresponding submission to add your receipt. A message stating, “Your receipt has been successfully uploaded to the Receipt Organizer” should pop up for confirmation.



**Claim Submitted**



Your claim has been successfully filed.

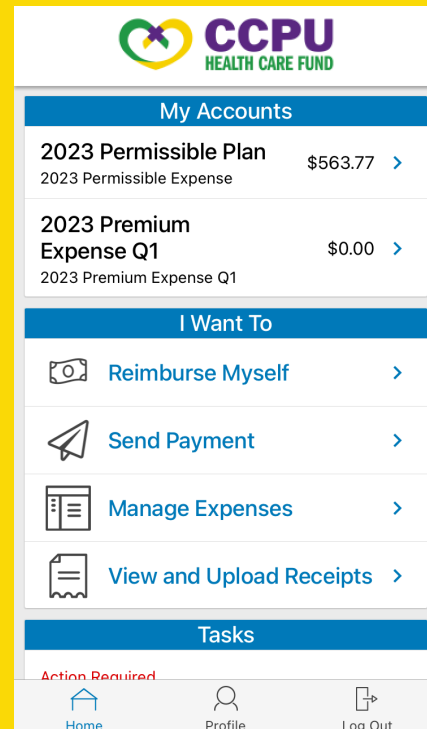
**2023 Permissible Plan**


Amount	\$1.23
Approved Amount	\$1.23

**Claim Summary**

Total Approved Amount	\$1.23
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**OK**









**My Accounts**




<b>2023 Permissible Plan</b> 2023 Permissible Expense	\$563.77 >
<b>2023 Premium Expense Q1</b> 2023 Premium Expense Q1	\$0.00 >

**I Want To**

-  **Reimburse Myself** >
-  **Send Payment** >
-  **Manage Expenses** >
-  **View and Upload Receipts** >

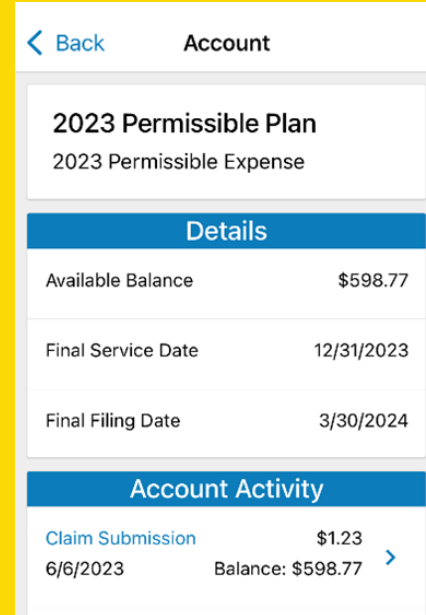
**Tasks**

Action Required

 Home     Profile     Log Out

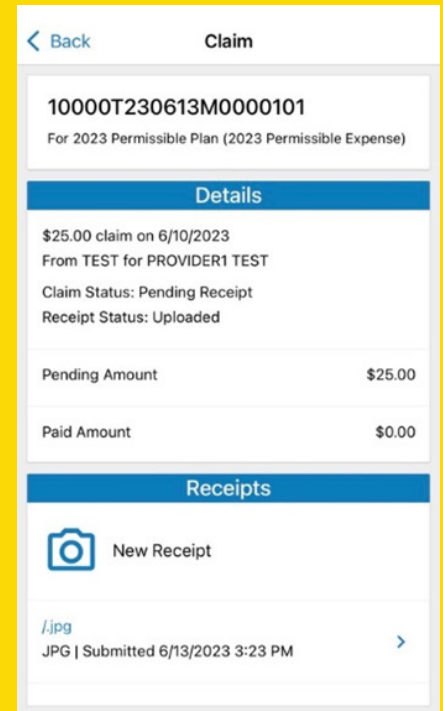
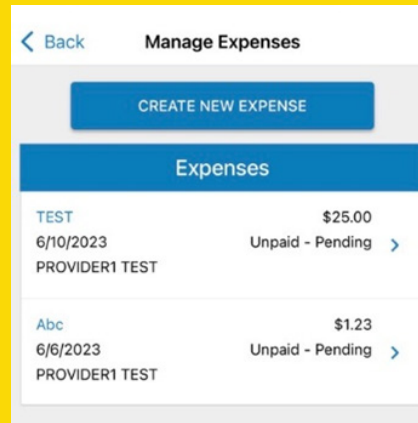
## HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **My Accounts** section.
2. For all Account Activity, click on the applicable account under the **My Accounts** section. This page will display **Details** (i.e., **Available Balance**) and **Account Activity**.



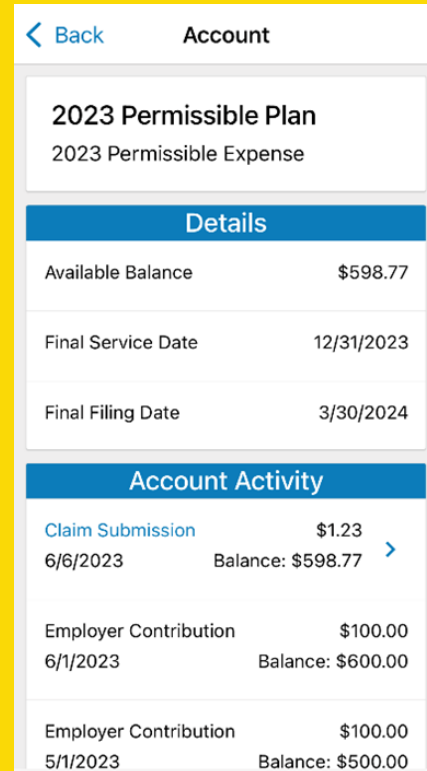
## HOW DO I VIEW MY REIMBURSEMENT CLAIMS HISTORY AND STATUS?

1. From the **Home Page**, under the **I Want To** section, select **Manage Expenses** to see your claims history.
2. By clicking on the line of the reimbursement claim, you can view the claim's **Details** and **Receipts**.



## HOW DO I VIEW MY PAYMENT REIMBURSEMENT HISTORY?

1. From the **Home Page**, select the applicable account under the **My Accounts** section. See **Account Activity** to view 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.



[Back](#) **Account**

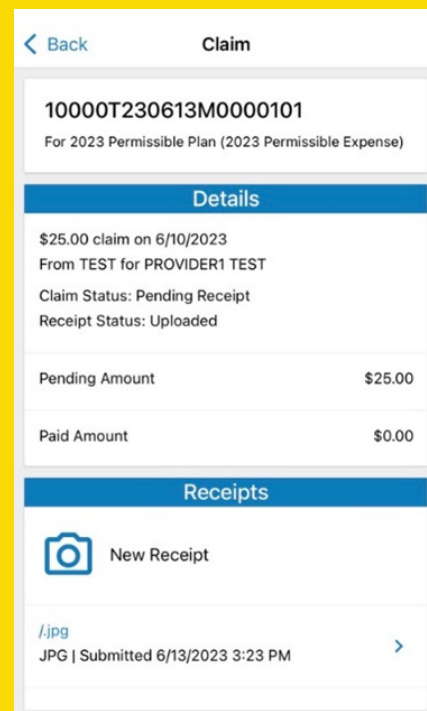
**2023 Permissible Plan**  
2023 Permissible Expense

**Details**

Available Balance	\$598.77
Final Service Date	12/31/2023
Final Filing Date	3/30/2024

**Account Activity**

Claim Submission	\$1.23	<a href="#">&gt;</a>
6/6/2023	Balance: \$598.77	
Employer Contribution	\$100.00	
6/1/2023	Balance: \$600.00	
Employer Contribution	\$100.00	
5/1/2023	Balance: \$500.00	



[Back](#) **Claim**


**10000T230613M0000101**  
For 2023 Permissible Plan (2023 Permissible Expense)

**Details**

\$25.00 claim on 6/10/2023  
From TEST for PROVIDER1 TEST  
Claim Status: Pending Receipt  
Receipt Status: Uploaded

Pending Amount	\$25.00
Paid Amount	\$0.00

**Receipts**

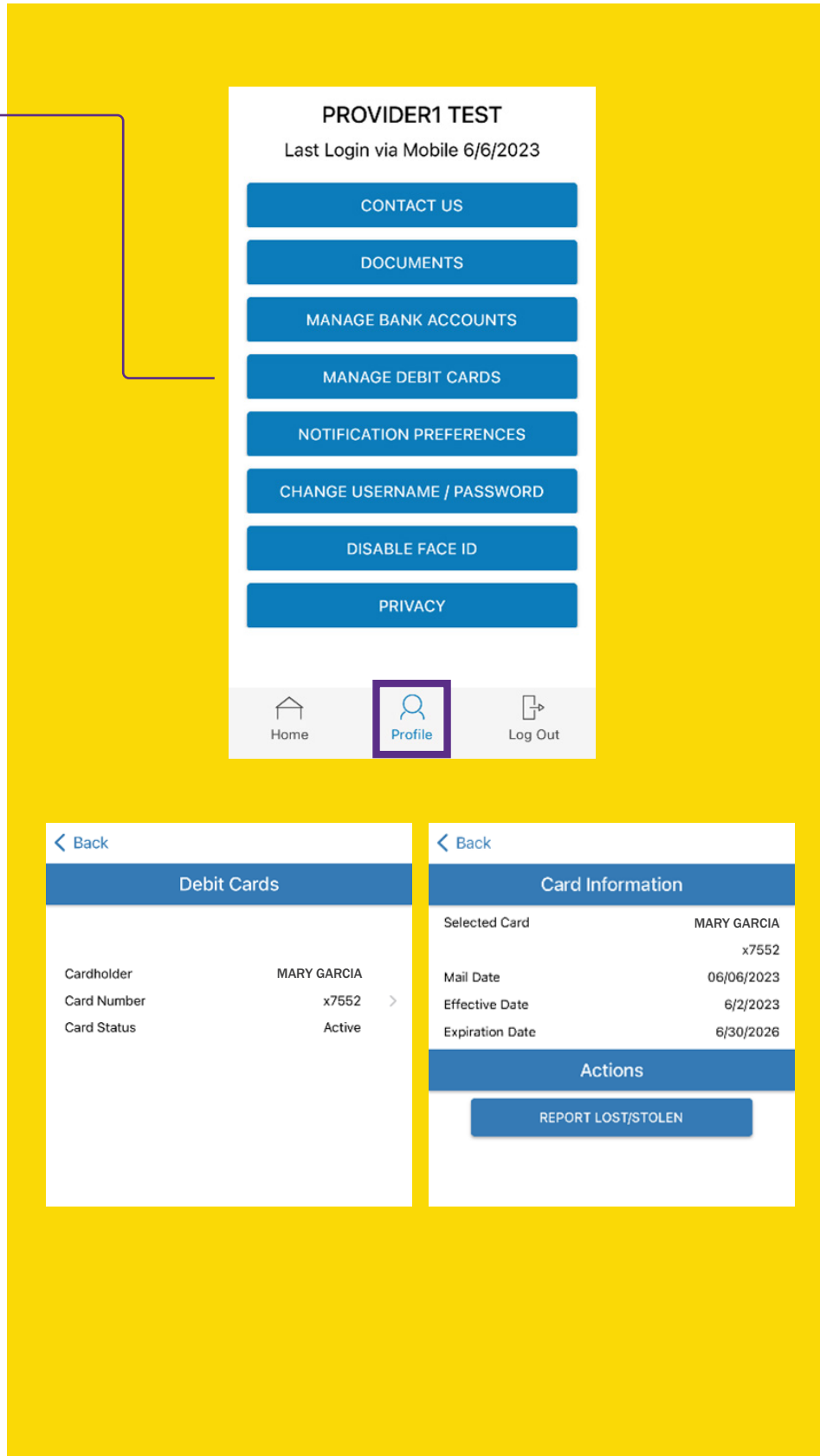
 [New Receipt](#)

[/jpg](#)  
JPG | Submitted 6/13/2023 3:23 PM [>](#)

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

1. Select the **Profile** tab and go to **Manage Debit Cards**.
2. Under **Actions**, click on **Report Lost/Stolen**.

NOTE: Once assigned, your debit card will automatically be uploaded here.



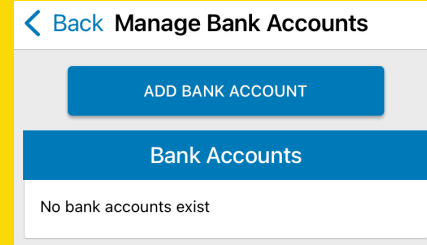
## HOW DO I GET MY REIMBURSEMENT FASTER?

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

1. Select the **Profile** tab and go to **Manage Bank Accounts**.
2. Add **Bank Account**.

You may also set up a bank account for direct deposits under the **Tasks** section on the **Home Page**.

**Please note:** There is a bank validation requirement. You will be notified on the portal to look for a small transaction or “micro-deposit” in your designated bank account in the next couple of days to enter online, which will validate your account.

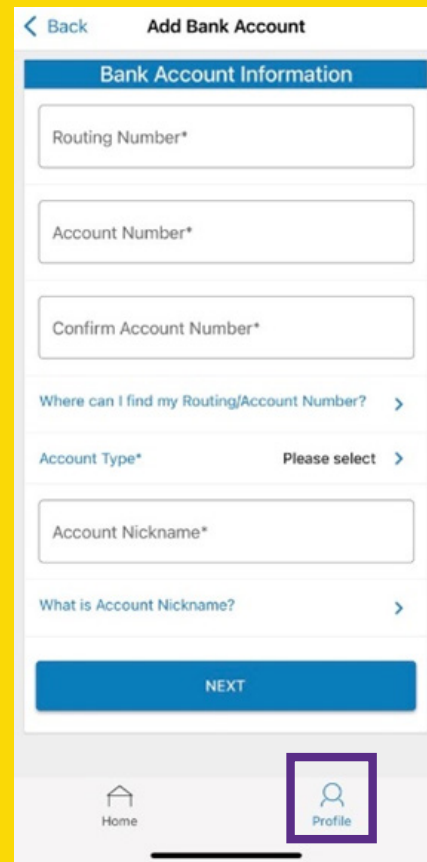


< Back **Manage Bank Accounts**

ADD BANK ACCOUNT

**Bank Accounts**

No bank accounts exist



< Back **Add Bank Account**

**Bank Account Information**

Routing Number\*

Account Number\*

Confirm Account Number\*

Where can I find my Routing/Account Number? >

Account Type\* Please select >

Account Nickname\*

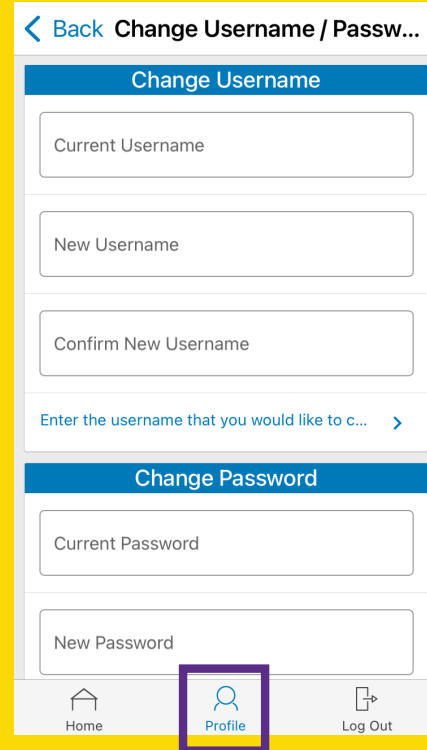
What is Account Nickname? >

NEXT

Home Profile

## HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. Select the **Profile** tab and go to **Change Username/Password**.
2. Follow the 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.)



The screenshot shows a mobile application interface for changing user credentials. At the top, there is a navigation bar with a back arrow and the text "Change Username / Pass...". Below this, the screen is divided into two main sections: "Change Username" and "Change Password".

The "Change Username" section contains three input fields: "Current Username", "New Username", and "Confirm New Username". Below these fields is a blue button with the text "Enter the username that you would like to c..." and a right-pointing arrow.

The "Change Password" section contains two input fields: "Current Password" and "New Password".

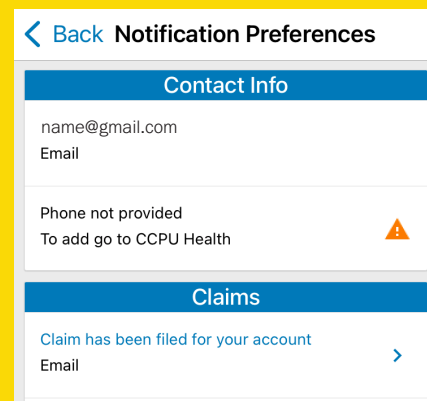
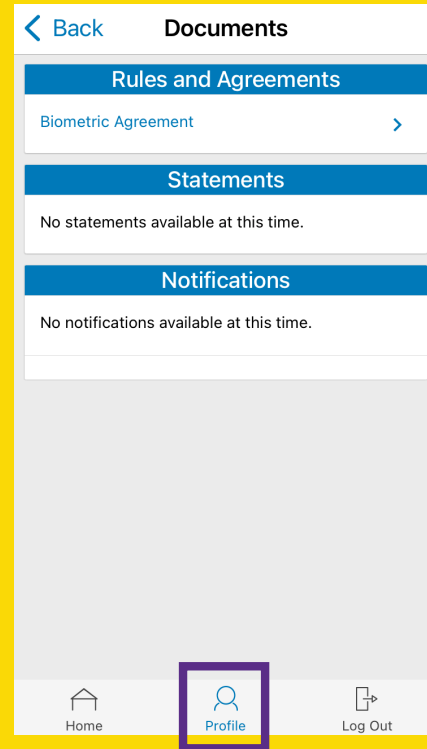
At the bottom of the screen is a navigation bar with three icons: a house icon labeled "Home", a person icon labeled "Profile" (which is highlighted with a purple square), and a door icon labeled "Log Out".



## HOW DO I VIEW OR ACCESS:

### ...NOTIFICATIONS?

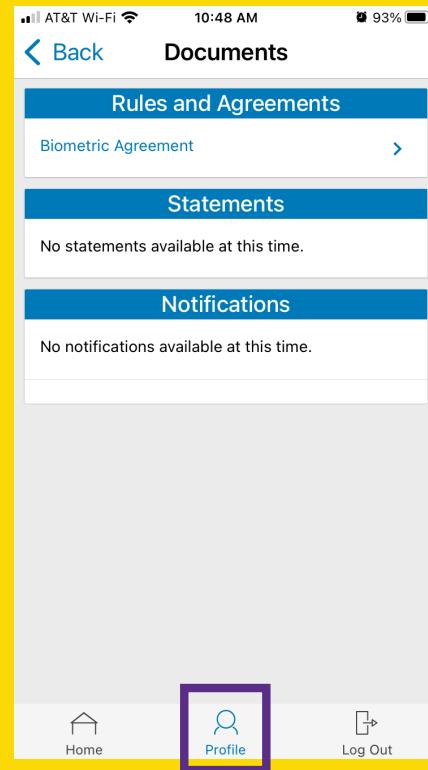
1. Select the **Profile** tab and go to **Documents**. On this page, **Notifications** will be displayed.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can manage notification preferences by going to the **Profile** tab and clicking **Notification Preferences**.



## HOW DO I VIEW OR ACCESS:

### ...DOCUMENTS & FORMS?

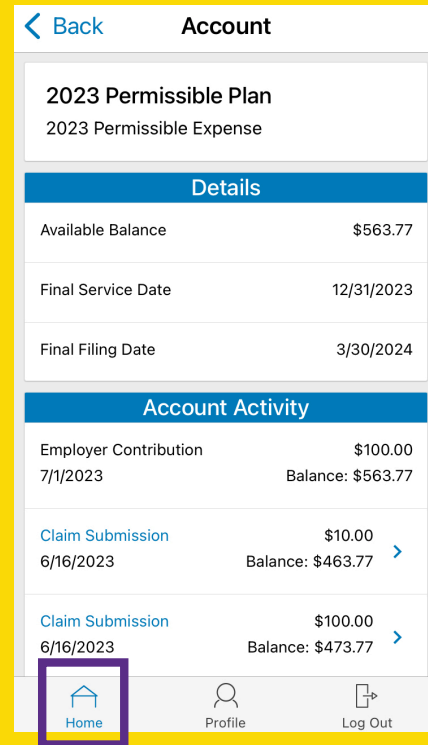
1. Select the **Profile** tab and go to **Documents**.
2. Click on any form or document of your choice.



HOW DO I VIEW OR ACCESS:

**...PLAN INFORMATION?**

1. On the **Home Page**, go to **My Accounts** and click on the applicable account name. You will see **Details** of the plan displayed.



[← Back](#)      **Account**

**2023 Permissible Plan**  
2023 Permissible Expense

**Details**

Available Balance	\$563.77
Final Service Date	12/31/2023
Final Filing Date	3/30/2024

**Account Activity**

Employer Contribution 7/1/2023	\$100.00 Balance: \$563.77
Claim Submission 6/16/2023	\$10.00 Balance: \$463.77 >
Claim Submission 6/16/2023	\$100.00 Balance: \$473.77 >

**Home**      Profile      Log Out