

# Consumer Portal QuickStart Guide

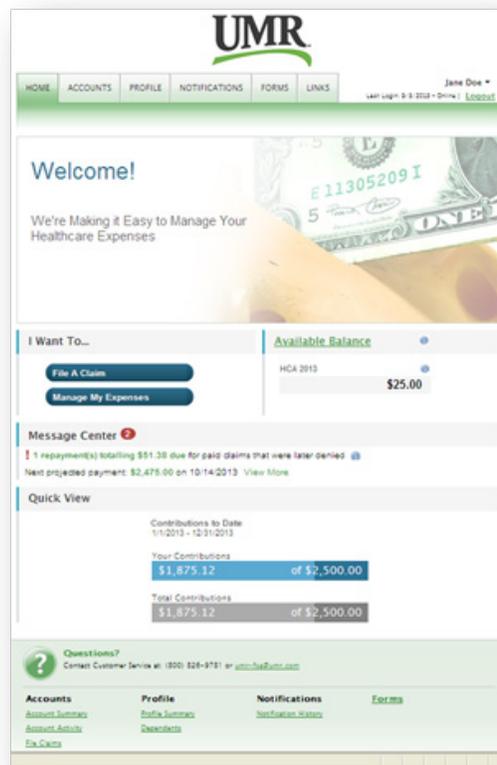
## Welcome to your UMR Benefit Accounts Consumer Portal.

This one-stop portal gives you 24/7 access to view information and manage your consumer-driven health plan, such as flexible spending accounts.

- 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
- Download plan information, forms and notifications

The portal is designed to be convenient and easy to use. You have your choice of three ways to navigate this site:

- 1) Work from sections within the home page;
- 2) Hover over the six tabs at top of home page to see drop-down menus; or
- 3) Follow links at the bottom of each page



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## How do I log on to the home page?

1. Go to **umr.com**
2. Enter your existing login ID and password. Click **Login**.
3. If you are not yet a registered, user please register at **umr.com**.
4. Click on the “myClaimCenter” tab
5. Click on the “Accounts&Balances” tab
6. Click on the “Get Started” link

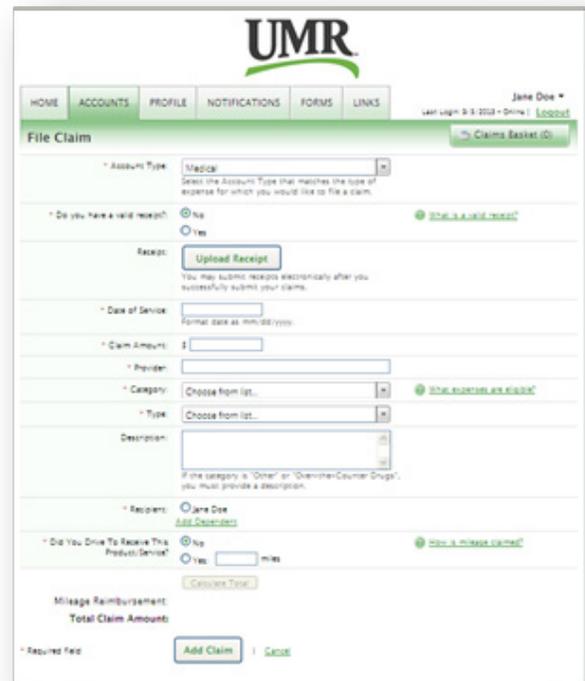
The **Home** page is easy to navigate:

- The top section shows messages from your employer and links to employee information.
- The **Message Center** section displays alerts and relevant links that enable you to stay up-to-date on your accounts.
- The **Next Projected Payment** section details when and how much you are projected to receive from any/all plans in which you are enrolled.
- The **Quick View** section shows contributions to date and your total election amount.

You can also navigate by hovering over the tabs at the top of the page or use links at the bottom of the page.

## How do I file a claim and upload a receipt?

1. On the **Home** page, under the **Accounts** tab, select **File Claims** from the drop down menu.
2. **OR** on the **Home** page, select **File a Claim**.
3. Enter your claim information and upload the receipt to the form that appears and click **Add Claim**. The claim is then added to the **Claims Basket**.
4. When submitting more than one claim, click **Add Another Claim**, select the Account Type, complete the form and click **Add Claim**.
5. When all claims are entered in the **Claims Basket**, click **Submit** to send the claims for processing.
6. After clicking Submit, the **Claim Confirmation** page will display. 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 administrator with the required receipts attached. **OR** if a receipt is required, you will see the **Upload Receipt** link. Click on the link and the **Receipts Needed** screen will display.

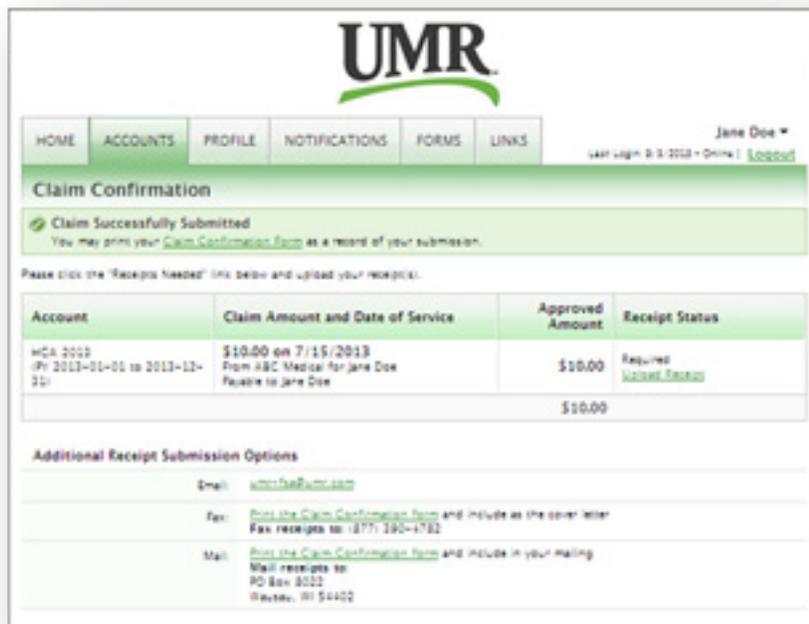


The screenshot shows the UMR 'File Claim' web form. At the top, there is a navigation bar with tabs for HOME, ACCOUNTS, PROFILE, NOTIFICATIONS, FORMS, and LINKS. The user is logged in as Jane Doe on 9-3-2012. The form is titled 'File Claim' and includes a 'Claims Basket (0)' link. The form fields are as follows:

- Account Type:** Medical (dropdown menu)
- Do you have a valid receipt?** No (selected), Yes (radio button)
- Receipt:** Upload Receipt (button)
- Date of Service:** (text input field)
- Claim Amount:** \$ (text input field)
- Provider:** (text input field)
- Category:** Choose from list... (dropdown menu)
- Type:** Choose from list... (dropdown menu)
- Description:** (text input field)
- Receipt:** Jane Doe (radio button), Add Receipts (button)
- Do You Drive To Receive This Product/Service?** No (selected), Yes (radio button) with miles (text input field)
- Missage Reimbursement:** (checkbox)
- Total Claim Amount:** (text input field)
- Required fee:** Add Claim (button), Cancel (button)



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7. For each claim that requires a receipt, click **Upload Receipt** on the far right and follow the instructions. (Your receipt must be in .doc, pdf, bmp, or gif format)
8. The Receipt Uploaded confirmation will appear: "Your receipt has been uploaded. You may upload additional receipts if needed until the claim is approved."
9. After uploading, you may also click **View Confirmation** and print the form for your records.

NOTE: If you see a **Receipts Needed** link in the Action Required section of your Home page, click on it to view a listing of **Claims Requiring Receipts**.

### How do I view current account balances and activity?

1. For your current account balance only, from the **Home** page, the account balance will be listed under **Available Balance**.
2. For an account summary that includes your current account balance(s), from the **Home** page, click the **Account Balance** link.  
**OR** under the **Accounts** tab, click **Account Summary** from the drop down menu.
3. For all account activity, from the **Home** page, click the **Account Activity** link at the bottom of the page. The Account Activity screen will appear. Select the account at the top of the screen to view your account activity.

### How do I view my claims history?

1. Under the **Accounts** tab, click **Account Summary**, and then click **Submitted Claims** for the applicable account.
2. **OR** from the **Home** page, click the **Available Balance** link, and then click **Submitted Claims** for the applicable account.



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## How do I view my payment (reimbursement) history?

1. From the **Home** page, under the **Accounts** tab, select **Payment History** from the drop down menu.
2. You will see reimbursement payments made to date.
3. Click **View Detail** on the far right to see claim details.



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