



OCA's Member Portal Guide

Simplify your healthcare finances with convenient, online access to your tax-advantaged benefit account

Contents

Getting started	2
Registration	2
Signing in	2
Menus	3
Main menu	4
Checking your account balance(s)	5
Submitting a claim or expense	6
Viewing claims and expenses	7
Your user profile	8
Debit cards	9
Managing alerts & messages	9
Changing your alert preferences	10

Getting started

Visit <https://oca125.com/oca-account/> to access the OCA's Member Portal.

Registration

Step 1: Click **register** to create an account.

Step 2: Complete your registration in a few easy steps.

1. Enter your **name** and **zip code**. If you have received a benefit debit card, check the box to **enter the card number** and expedite the registration process.
2. We will send you a special code for verification. Check your email or text messages and **enter the code** provided.
3. **Create** a username and password for your account.
4. **Select** four security questions and **provide** your answers. For your security, these questions may be randomly asked during subsequent logins.
5. **Confirm** your email address.
6. Review your answers and **submit** your registration.

Step 3: Once you've successfully registered, click **done** to sign in.

We will maintain the confidentiality of your personal information in accordance with our privacy policy.

Sign in

Username *

johndoe123

Forgot your Username? [Let us help](#)

Password *

.....

Forgot your Password? [Let us help](#)

✓ SIGN IN

Don't have an account?

REGISTER

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5 STEP 6

You are on step 1 of 6

Let's get you registered - please provide the information below.

First Name * Maura

Last Name * TestTwelve

Zip Code *

Check this box if you received a debit card for your benefit account.

✕ CANCEL ✓ NEXT

Signing in

Enter the **username** and **password** you created. You may be asked to **answer** your security questions or enter a one-time passcode, sent to you via email or SMS text.

Menus

With OCA Member Portal you can manage your healthcare spending accounts, claims and transactions in one easy place.

The screenshot shows the OCA Member Portal dashboard. At the top right, there are four main navigation elements: the FSA Store icon (a checkmark in a circle), the Marketplace icon (a shopping cart), a Notifications box with a red circle containing the number '2', and a user profile dropdown showing 'Hi, Sarah Jin' with a downward arrow. Below these, the dashboard content includes a banner for 'EASY HSA TRANSFER', a 'My Accounts' section with a bar chart showing a Health Reimbursement Arrangement balance of \$3,750.50 and a Flexible Spending Account balance of \$2,850.00, and a 'My Alerts' section listing recent notifications.

Use the icons in the upper right of the screen to shop with your benefit accounts, view notifications, or edit your profile.



FSA Store

FSA Store

Click the **FSA Store** icon to shop for FSA-eligible products.



2 Notifications

Notifications

Click **notifications** to view your news and alerts. The number in red tells you how many unread notifications you have.



Marketplace

Marketplace

Click the **marketplace** icon to access the CDH marketplace where you can use your eligible FSA and HSA accounts for purchases.



Hi, Sarah Jin


Drop-down menu

Click the **drop-down menu** to access your:

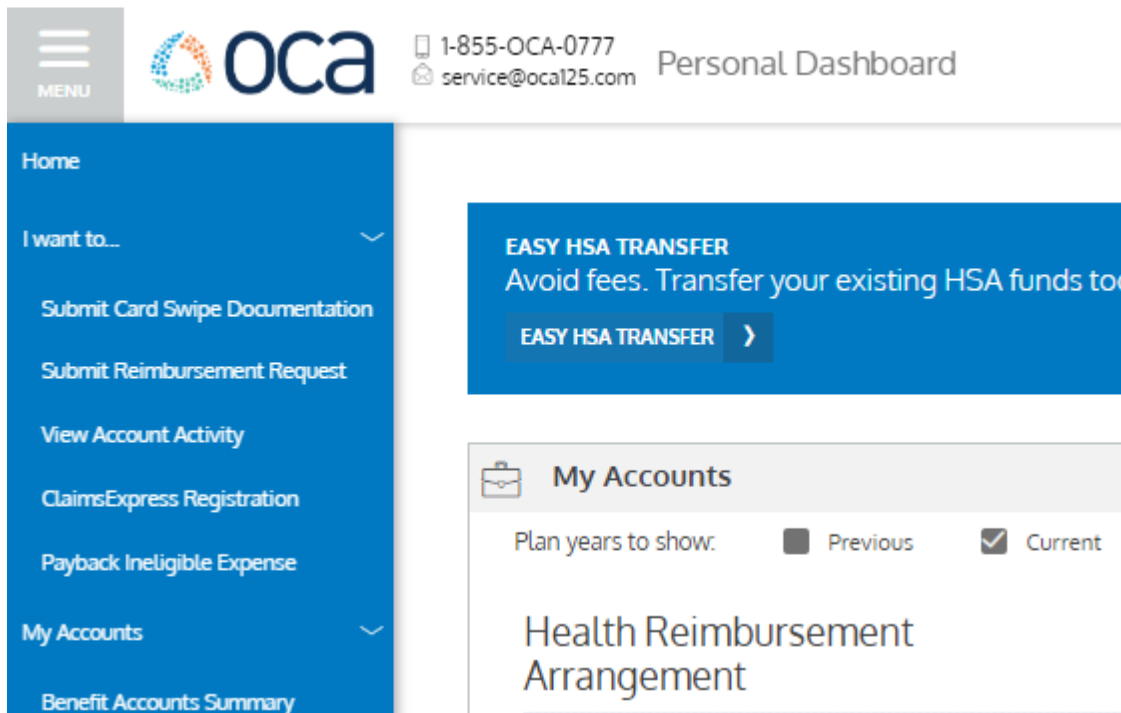
- Profile
- Debit card information
- Communication settings
- Contact us
- Log out

Main menu

Expand the hamburger **menu** on the upper left of your personal dashboard to navigate to your accounts, claims and other resources.

Click  to expand the menu.

Use the **home** button to return to the main screen of your personal dashboard from any other screen within OCA Member Portal.

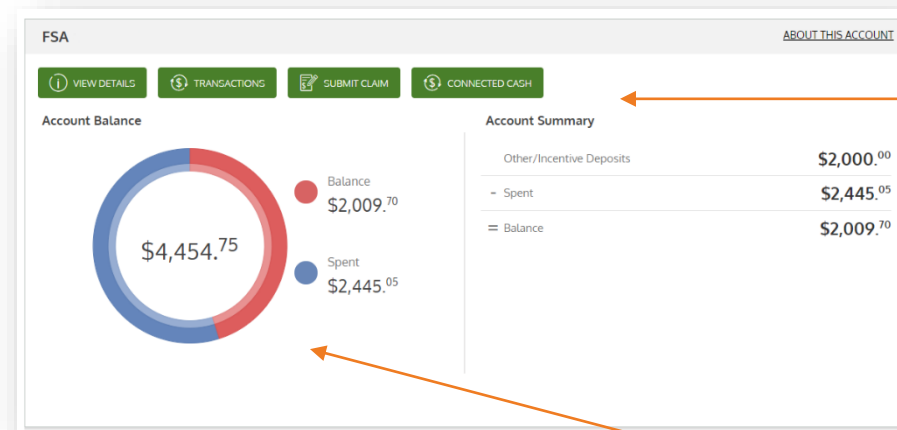


Checking your account balance(s)

The benefit account summary page provides a quick view of your account balance(s).

Get there by clicking **menu > my accounts > benefit account summary**

Each of your accounts displays in its own box with the account type listed on top. A flexible spending account (FSA) is displayed in the image below.



Quick links to additional account details, a list of transactions, claim submission, and other tools!

Your **annual** election balance, split into how much has been spent and how much is still available to spend.

Submitting a claim or expense

The “*submit a reimbursement request*” wizard will walk you through a series of questions to help you submit your request correctly. You can use this wizard for **reimbursement requests** or depending on your plan, to **pay a provider** for an eligible cost.

To use the expense wizard, click **menu** > I Want to > Submit Reimbursement Request. When paying yourself, you may choose to receive a check via mail or set up direct deposit to your bank account.

The screenshot shows the OCA Member Portal interface for submitting a claim. The top navigation bar includes the OCA logo, contact information (1-855-OCA-0777, service@ocal25.com), and the page title 'Submit claim for reimbursement'. A warning message states: 'Please note that any eligible claims submitted using the online claim submission form will be reimbursed via paper check or direct deposit. **DO NOT use the online claim form to submit documentation for pending card transactions.**'

The left sidebar contains a 'MENU' with options: Home, I want to... (dropdown), Submit Card Swipe Documentation, Submit Reimbursement Request (selected), View Account Activity, ClaimsExpress Registration, Payback Ineligible Expense, My Accounts (dropdown), Benefit Resources (dropdown), and Support (dropdown).

The main form area includes the following fields:

- * - Required Field
- Service Start Date *: select date (calendar icon)
- Service End Date: select date (calendar icon)
- Claimant: Honig, Ross (dropdown arrow)
- Account Type: Health Reimbursement Arrangement (2022) (dropdown arrow)
- Claim Amount *: \$ 0.00
- Whom shall we pay?:
 - Pay Provider
 - Pay Me
- Provider Name: [text input field]
- Account Number: [text input field]

You may attach receipts to your claim and expense entries to validate, if necessary.

The screenshot shows the 'DOCUMENTATION' step of the claim submission wizard. The progress bar at the top indicates 'CLAIM DETAILS' (completed), 'DOCUMENTATION' (current step), and 'CONFIRM SUBMISSION' (pending).

An information icon (i) is followed by the text: 'Please Choose a Validation Method to Continue'.

Two options are presented:

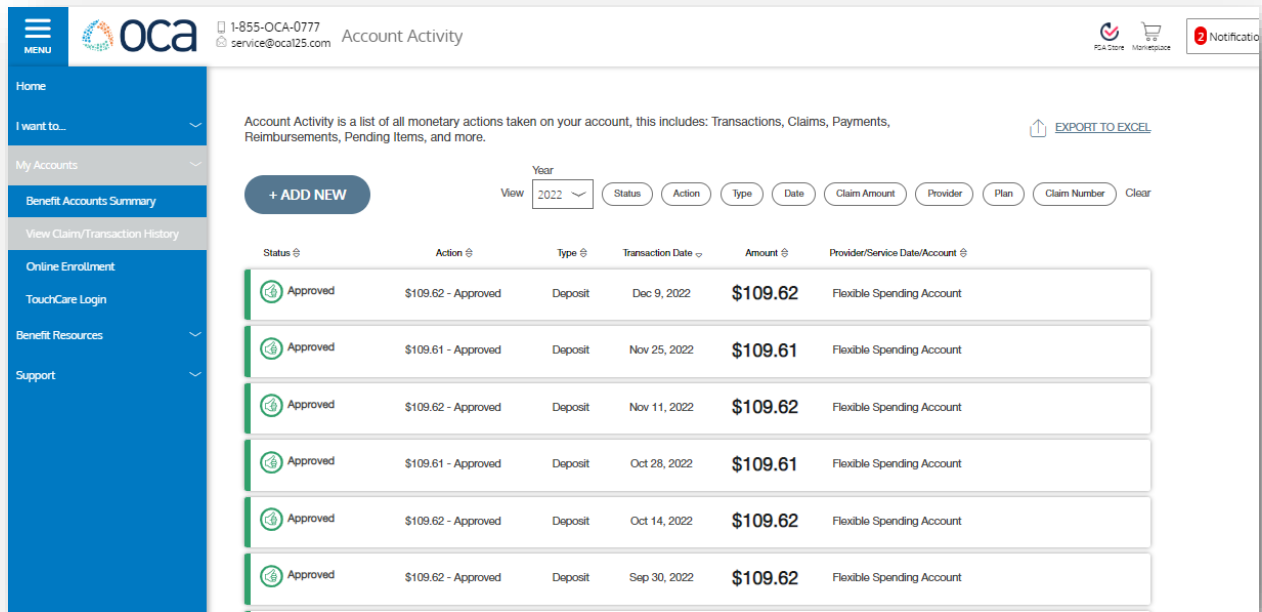
- Attach Claim Receipt**: Take a photo of your receipt or attach an existing document now.
- Validate Later**: Submit the claim without a receipt now, knowing a receipt may be required for claim approval.

A 'CANCEL' button with an 'X' icon is located at the bottom right of the modal.

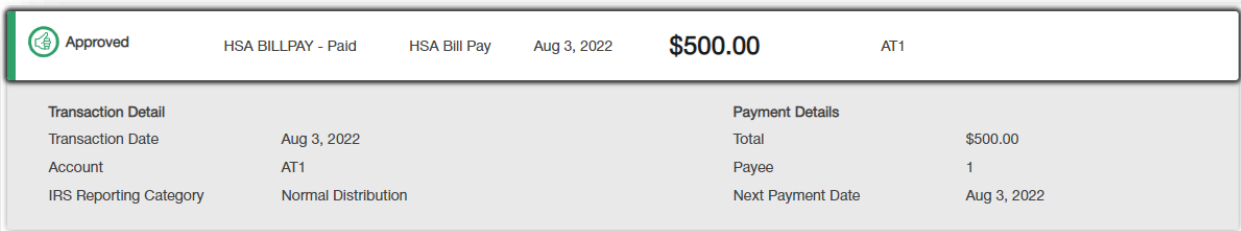
Viewing claims and expenses

View claims and transactions on the *account activity* page. Use the buttons on top to filter transactions by year, plan, status and more!

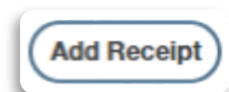
To view, click **menu** > My Account > **view claims/transaction history**



Click on an individual transaction to view its **details** and take action, as needed. Based on your policy and purchases, transactions may be marked as Approved, Pending, Action Required, or Denied.



If a receipt is required, the option to attach one will show within the transaction. Adding a receipt may also help resolve pending transactions faster.



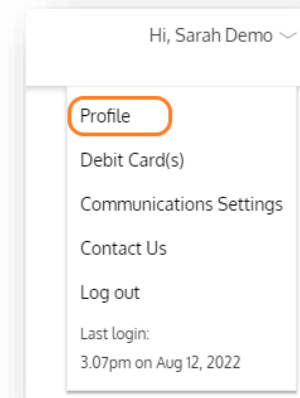
Click **add receipt** to attach your document for review.

Your user profile




Click the drop-down next to your **username** and select **profile** to view your personal information.

From this page, you can see your:

- Phone number and address
- Reimbursement method
- Dependent information
- And more!



To change your personal information, click **edit profile** from within your profile page, or **edit dependent** from your list of dependents below.

 <p>change picture</p> <p>Sarah Demo</p> <p>Date of Birth **_**_****</p> <p>Marital Status None</p> <p>Gender Female</p>	<p>Phone ***-***-4409</p> <p>Mobile Phone ***-***-5309</p> <p>Email Address edit e*****ald@alegeus.com</p>	<p>Home Address 5780 Winding Hills Canyon Beverly Hills CA, 90210 US</p>	<p>EDIT PROFILE</p> <p>change password</p> <p>delete account credentials</p>
	<p> Employer Lopez Demo</p> <p>Employee Status Active</p>	<p> edit - Eligible for Connected Cash</p> <p>Reimbursement Method Check</p>	



Note: You can update your **mobile phone number** from within your profile, however, you may still need to update your SMS notifications within the **communication settings** page to change your alert preferences.

Debit cards

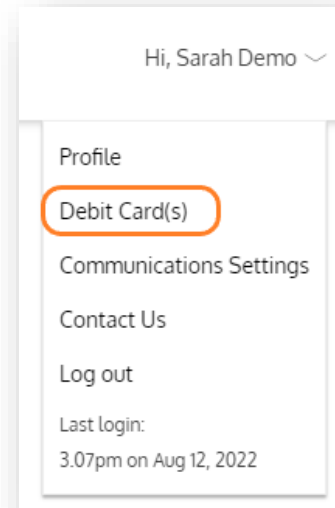
You can view the benefit account debit cards that have been issued to you and your dependents from within OCA Member Portal.



To view your benefit account debit cards, click the drop-down by your **username** and select **debit cards**.

Click on an individual card to view more information. From here you can:

- Activate a new card
- View the card pin
- Report the card lost or stolen

You can also request cards for your dependents, if they haven't received one, by clicking **issue debit card** next to their name at the bottom of the page



	**** -1642	New	Lente Dutch	
	**** -0084	New	Eliza Kid	✓ ACTIVATE VIEW PIN REPORT LOST / STOLEN
Issue Status:	Sent	Activation Date:		
Mailed Date:		Expiration Date:	Mar 31, 2024	

Managing alerts & messages

The notification center is your place to view account messages, items awaiting action, and potential opportunities.






To view, click **notifications** on your **personal dashboard**. The number in red alerts you of unread notifications.

Click on an **individual message** to see the full text.

You have **12** Notifications to view.

The notification center is your place to view information about your benefit accounts activity, review items that need to be taken care of, and see potential opportunities to maximize your overall benefit account experience.

View **All** Messages Opportunities

	acct bal stmt TEST	Dec 1, 2021
	Your Recent Health Financial Account Claim	Nov 17, 2021
	acct bal stmt TEST	Nov 1, 2021



Messages provide important information about your account(s). Be sure to check your notifications for crucial messages.

Opportunities are tips and tricks that can help you maximize your benefit accounts, such as suggesting to switch to direct deposit reimbursements or electronic-only statement delivery. You may also be presented with opportunities to invest your HSA dollars, or save money on prescription drugs.


Changing your alert preferences

Change your alert preferences from the communication settings page. Click the drop-down next to your **username** and select **communication settings**.

For each alert, choose whether you receive mobile, email, both, or no notifications.

Click **save** when you are done editing your preferences.

You can also update your email address and register your mobile phone for SMS text alerts.

Hi, Sarah Demo 

- Profile
- Debit Card(s)
- Communications Settings**
- Contact Us
- Log out
- Last login:
3:07pm on Aug 12, 2022

Assigned Notifications



You are opted-in to one or more mobile communications, but do not have a mobile number registered. You will not receive these communications unless you register a mobile number.



The notifications below are available to you. Please define the delivery method for each notification you wish to receive. Please ensure you have an email address and/or registered mobile in order to receive these notifications.

- mobile
- email
- both
- none

- Account Balance Alert**
This communication is sent when your account balance falls below \$50.00.
 mobile email both none
- Account Balance Statement**
This communication is sent on a Monthly basis.
 mobile email both none
- Card Mailed**
This communication is sent when your card has been mailed.
 mobile email both none
- Enrollee Welcome Email**
This communication is sent when your account is created.
 mobile email both none

SAVE

Email Address

e***l@email.com

Phone Registration Status

ADD NUMBER