

OCA Portal

Participant User Guide

2018

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Please note: The guide captures only a portion of the resources available on the participant portal

➤ Registration

1. Go to (URL) and simply click the register button.
2. Choose a username and password. You can obtain your *employee ID* and *employer ID* from your account administrator. If you already have a benefit debit card, the card number can be used in place of the *employer ID* in the *registration ID* field.

➤ Secure authentication

3. The next part of the registration process involves setting up your secure authentication. This important step helps ensure your account is secure and private.
4. On the next page, you're asked to verify all of the information you've entered during the secure authentication process. After you've reviewed and confirmed the accuracy of the information, please click *submit setup information*.

Don't have an account?

 **1** REGISTER

 Username *

 Password *

Password Strength

 Confirm Password *

First Name *

Initial

Last Name *

 Email *

 Employee ID *

Registration ID *

I accept [Terms of Use](#) ☐

Answer Security Questions

In which city were you born?

What is the name of the college your spouse attended?

Register - Secure Authentication

STEP 1 > STEP 2 > **STEP 3** > STEP 4

First Name

Last Name

 Confirm Email *

4  The email address entered is used for security encryption only. It is not used for solicitation purposes.



Checking your account balances

To access a quick view of your account balances, navigate to the *benefit account summary* page. Each account displays in a separate tile, and provides at-a-glance details such as balance, amount spent, and important dates surrounding your account's plan year.

- Chart shows how much of the annual election has been spent, and how much is still available to spend.
- 'Deadlines' section shows important dates, such as the last day funds can be spent, and the last day claims can be submitted against the plan.
- Buttons provide quick links to additional account details, a list of account transactions, and an electronic claim form, so you can immediately submit a claim.



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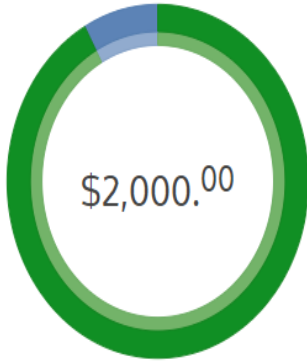
 log out

Benefit Account Summary

Current ▾

Health Reimbursement Arrangement (Sample) (01/01/2018-12/31/2018)

Account Balance



Available Balance
\$1,838.⁸⁰

Spent
\$161.²⁰

Account Summary

Annual Allocation	\$2,000. ⁰⁰
Allocation to date	\$2,000. ⁰⁰
Spent	\$161. ²⁰
Balance	\$1,838. ⁸⁰

Deadlines

Plan Start	Jan 1, 2018
Plan End	Dec 31, 2018
Last Day to Submit Claims	Mar 31, 2019
Last Day for Spending	Dec 31, 2018

 VIEW DETAILS

 TRANSACTIONS

 SUBMIT CLAIM

Submitting a claim

OCA's participant portal allows you to enter new claims and expenses, as well as view and edit pending ones. If you have a receipt to substantiate your claim, you can easily attach it to a claim or expense to expedite the reimbursement process.

- To enter a claim and request reimbursement, open the *submit claim* page and complete the form.
- Be sure to upload the required documentation. You can click browse to navigate to the receipt file, or drag & drop.
- Click 'submit' to send the request to your administrator for processing.

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Add claim for immediate reimbursement

Claim Form Instructions **IMPORTANT:** When submitting an online claim, you will be required to enter in each claim line independently. For example, if the EOB claim total is \$75, but the claim represents three \$25 services, you will be required to enter in each \$25 claim. Claims that are not itemized upon submission may be cause a delay in processing. Get your reimbursement as quickly and securely as possible by changing your reimbursement method to Direct Deposit.
[Click Here to change your settings](#)

* - Required Field

 Claimant

Sample Employee 

 Reimbursement Method

Check 

 Service Start Date *

select date 

 Service End Date *

select date 

 Service Type

-- Select One -- 

 Claim Amount *

\$ 0.00

 Would you like to submit this as a recurring payment?

 Yes

 No

 Pay provider? *

 Yes

 No



View Claims and Expenses

Once entered, claims and expenses can be viewed on the *claims activity* page. From here, you can view claim statuses, attach receipts, and request reimbursement for eligible expenses.

- Participants will receive alerts and email notifications when the claim status has been updated by OCA.



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Claim Activity

Which claims do you want to see? Select here

☒ Action Needed☒ Approved/Paid/Submitted☐ Denied [SEARCH FOR CLAIMS](#) [SUBMIT CLAIM](#)

Action Needed

Approved/Paid/Submitted



Resolve pending debit card transactions

If you swipe your benefit debit card for eligible products or services, you may be required to submit a receipt or other supporting documentation before the card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

1. Navigate to the *transactions* page in OCA Portal.
2. Locate the pending transaction (using the search filters at the top of the page, if necessary).
3. Click to expand the transaction, and click 'add receipt' to attach your supporting documentation to the transaction.

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Transactions

Year: 2018 Plan: All Type: All [EXPORT TO EXCEL](#)

Which transactions do you want to see? Select here

☒ Approved/Posted ☒ Pending/Processing ☐ Authorized ☒ Denied [SEARCH FOR TRANSACTIONS](#) [PRINT TRANSACTIONS](#)

(\$550. ⁰⁰)	Flexible Spending Account Approved	Claim Orthodontia DR. DENTIST	Aug 21, 2018	
(\$45. ⁰⁰)	Health Reimbursement Arrangement (Sample) Denied	Claim In Network Dedu...	Aug 17, 2018	
\$101. ⁹²	Flexible Spending Account Approved	Deposit Payroll Deposit	Aug 17, 2018	
\$101. ⁹²	Flexible Spending Account Approved	Deposit Payroll Deposit	Aug 16, 2018	
(\$55. ⁶²)	Flexible Spending Account New	Card	Aug 13, 2018	ADD RECEIPT



Register for OCA's ClaimsExpress

Tired of filling out time-consuming forms and getting challenged for your medical claims? Connect your health insurance plans to get submission forms **pre-filled** and **automatically substantiate claims**.

After a one-time set up, all of your EOBs will be automatically submitted to OCA for processing. Linking your insurance account is quick and easy!



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OCA's ClaimsExpress

ClaimsExpress Registration

After a one-time set up, all of your EOBs will be automatically submitted to OCA for processing. Linking your insurance account is quick and easy!

Getting Reimbursed Just Got A Whole Lot Easier

Tired of filling out time-consuming forms and getting challenged for your medical claims? Connect your health insurance plans to get submission forms **pre-filled** and **automatically substantiate claims**.

[CONNECT YOUR PLANS](#) [OR LEARN MORE >](#)

My Recent Transactions

\$333. ³³	Dependent Care FSA	Approved	Deposit Jun 22, 2018
\$333. ³³	Dependent Care FSA	Approved	Deposit Aug 17, 2018
\$333. ³³	Dependent Care FSA	Approved	Deposit Jul 20, 2018
\$333. ³³	Dependent Care FSA	Approved	Deposit Jul 6, 2018
\$333. ³³	Dependent Care FSA	Approved	Deposit Jun 8, 2018
\$333. ³³	Dependent Care FSA	Approved	Deposit Aug 3, 2018
(\$550. ⁰⁰)	Flexible Spending Account	Approved	Claim Aug 6, 2018
(\$45. ⁰⁰)	Health Reimbursement Arrangement (Sample)	Denied	Claim Aug 2, 2018
\$101. ⁹²	Flexible Spending Account	Approved	Deposit Aug 17, 2018



View and make updates to your profile

To access and edit your user profile, click the username hyperlink on the right side of the navigation bar. From this page, you can:

1. Update your phone number and address.
2. Change your password
3. Update your reimbursement method
4. Add a new dependent
5. Update an existing dependent

The image shows where each item in the list above is located.

The screenshot displays the OCA (Office of Compliant Administration) User Profile page. The header includes the OCA logo, contact information (1-855-OCA-07777, service@oca125.com), and navigation links (I want to..., My Accounts, Resources, Support). The user is logged in as 'ocademo2018' with a last login time of 6:24pm on Aug 21, 2018. The page title is 'User Profile'.

The profile section is divided into two columns. The left column contains a profile picture placeholder with a 'change picture' link, and a list of personal details for 'Sample Employee': Date of Birth (Aug 1, 1987), Employee ID (*****0000), Marital Status (None), and Gender (Male). The right column contains contact and address information: Phone (6095140777), Email Address (rhonig@oca125.com) with 'edit' and 'delete' links, Home Address (3705 Quakerbridge Rd. Suite 216, Mercerville, NJ, 08619, US), and Reimbursement Method (Check). A 'change password' link is also present.

Numbered callouts indicate the following features:

- 1. 'EDIT PROFILE' button (top right)
- 2. 'change password' link (top right)
- 3. 'edit' link for Reimbursement Method (middle right)
- 4. '+ ADD FAMILY MEMBER' button (bottom right)
- 5. 'Sample Spouse' entry under Family Members (bottom left)

The 'Family Members' section at the bottom shows 'Sample Spouse' as a 'Spouse Or Common Law Spouse'.



Manage your communication/alerts

You can change whether or not you receive certain message types, as well as how you receive them from the *communication settings* page. This page can be accessed by clicking the sprocket symbol in the navigation bar.

- You may choose, for each alert type, whether you receive it via mobile, email, both, or neither.
- Click 'save' when you are done editing your preferences. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts

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Communication Settings

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
Card Lost/Stolen	☐	☐	☒	☐
This communication is sent when your card has been marked as "Lost/Stolen".				
Card Mailed	☐	☐	☒	☐
This communication is sent when your card has been mailed.				
Card Transaction Approved	☐	☐	☒	☐
This communication is sent when your card is approved at the point of sale. It will display the account name, transaction amount and new balance.				
Direct Deposit Account Change	☐	☒	☐	☐
This communication is sent when your direct deposit account has been updated.				
Manual Claim Entered	☐	☐	☒	☐
This communication is sent when your administrator has entered a manual claim on your account.				

Email Address

rhonig@oca125.com



Phone Registration Status

+

 ADD NUMBER



Contact Us

We should be contacted whenever questions arise regarding processing of claims, how to submit claims, how your benefit plan works or relate to your existing insurance plans, mySource debit cards, our web access portal, or just general knowledge/guidance questions.

Emails/Phone Options:

- Go to the “contact us” located under support tab to submit your service questions directly to OCA.
- **Service@oca125.com (Questions/Inquiries)** – Any questions or inquiries regarding your claims history, card activity, balances, etc., please email OCA’s client service email.
- **Claims@oca125.com (Claims Processing)** – For participants choosing to email – rather than fax or use the online web portal or mobile app methods of remitting claims.
- **Phone Number:** 609-514-0777 or Toll Free at 1-855-OCA-0777
- **Fax Number:** 609-514-0111

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Contact Us



Your Administrator is:
Office of Compliant Administration
You may contact your Administrator by sending an email below.
In order to better assist you, your name and employer's name will be automatically added to the body of your message.

To Office of Compliant Administration

CC

From

Subject

 SEND

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