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CONSUMER MOBILE GUIDE

Welcome

to your Working Spouse Program Consumer App.

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

The app enables you to:

- File a reimbursement request online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, reimbursement requests
- View claim 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 it in two ways:

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

HOW DO I LOG ON TO HOME SCREEN?

1. Download the PCMI HSA/FSA/HRA Savings Account app from Google Play or the App Store. It is available for both Android and Apple phones.

2. Enter your username and password (both provided by Pinnacle Claims Management Inc.).

    a. Username: Email address

    b. Temporary Password: First Name initial + Last Name + DOB (ddmmyyyy). Initial and last name needs to be in all CAPITAL LETTERS.

        Example: John Doe October 24, 1972, would be JDOE24101972

3. Click Login
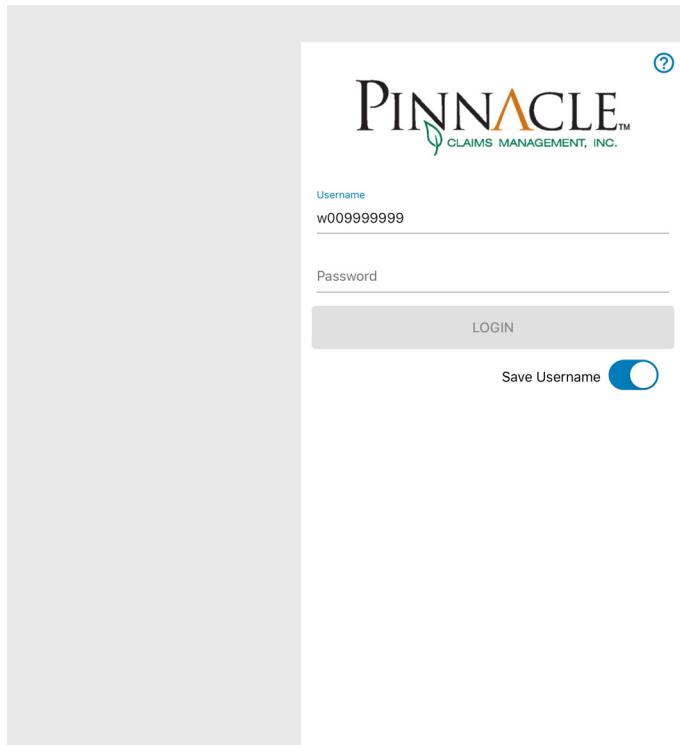
The **Home Screen** is easy to navigate:

*   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.
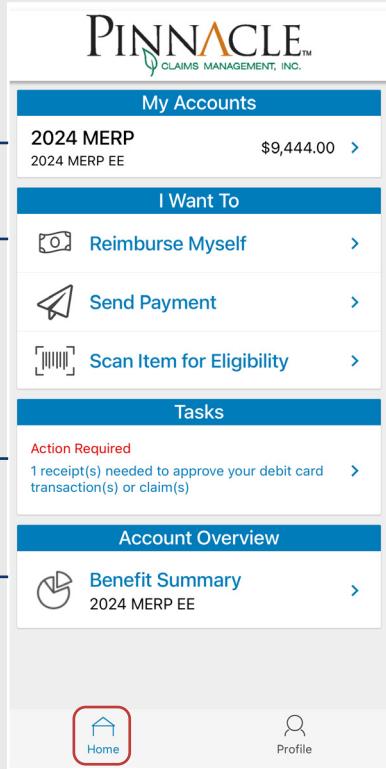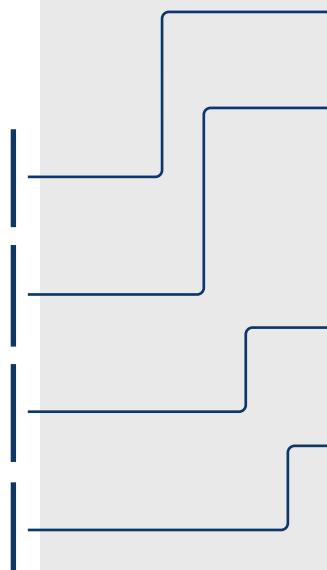
HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the Home Screen, 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.

‹ Back   Reimburse Myself

Amount*
$5.00

Provider*
Kaiser Permanente

Category & Type*   Medical Coinsurance ›

Description
Annual physical with Primary Care

Recipient*   John Doe ›

You must have a valid receipt to file a claim ›

Receipts

📷 Upload Receipt

Claim Summary

Pay From
Medical

Home   Profile
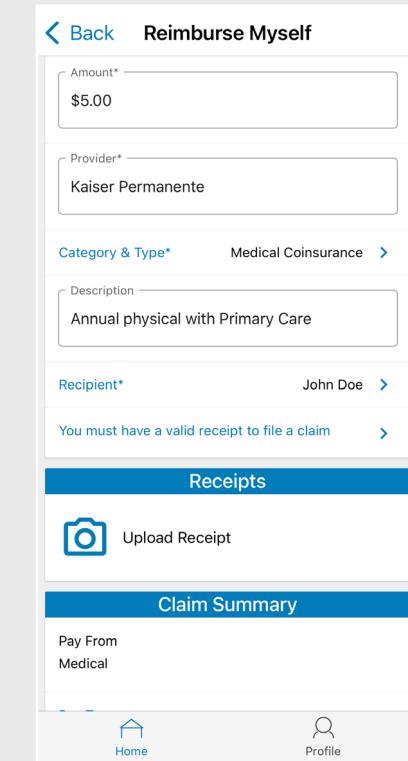
Claim Submitted

✓

Your claim has been successfully filed.

2024 MERP

Amount	$5.00
Approved Amount	$5.00

Claim Summary

Total Approved Amount	$5.00

OK

HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the Home Screen, 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 (e.g. Available Balance) and Account Activity.

‹ Back   Account

2024 MERP
2024 MERP EE

Details

Available Balance	$9,439.00
Final Service Date	12/31/2024
Final Filing Date	3/31/2025

Account Activity

Claim Submission 1/16/2024	$5.00 Balance: $9,439.00	›
Claim Submission 1/6/2024	$1.00 Balance: $9,444.00	›
Claim Submission 1/6/2024	$5.00 Balance: $9,445.00	›
Employer Contribution 1/1/2024	$9,450.00 Balance: $9,450.00	
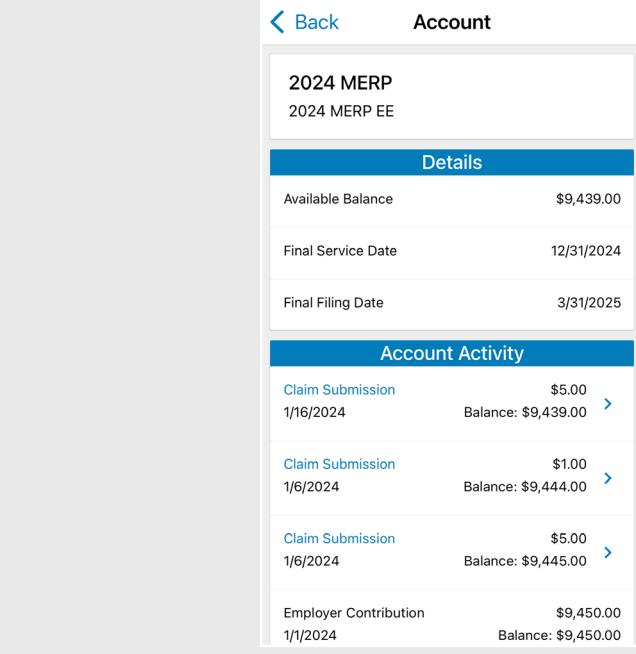
HOW DO I VIEW MY REIMBURSEMENT CLAIMS HISTORY AND STATUS?

1. From the Home Screen, 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.

Account

2024 MERP
2024 MERP EE

Details	
Available Balance	$9,439.00
Final Service Date	12/31/2024
Final Filing Date	3/31/2025

Account Activity	
Claim Submission 1/16/2024	$5.00 Balance: $9,439.00
Claim Submission 1/6/2024	$1.00 Balance: $9,444.00
Claim Submission 1/6/2024	$5.00 Balance: $9,445.00
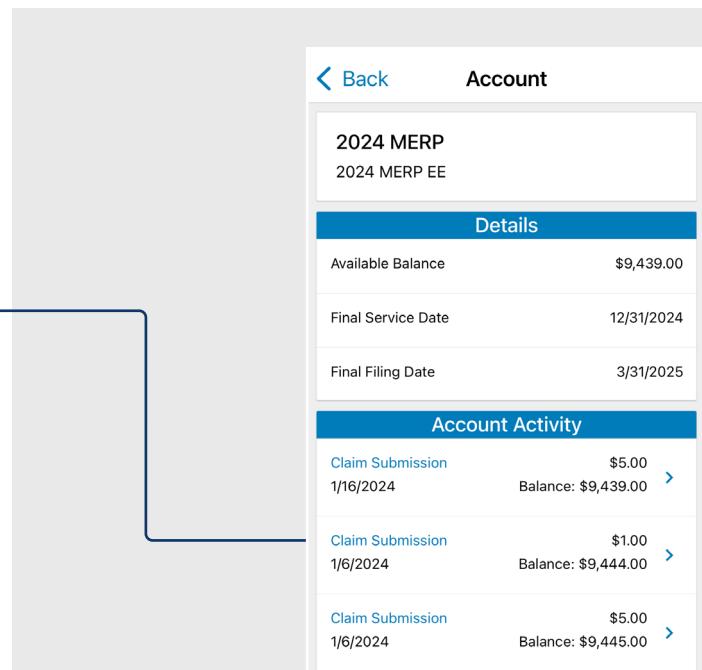
HOW DO I VIEW MY PAYMENT REIMBURSEMENT HISTORY?

1. From the Home Screen, 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.

Claim

999999240106C0000101
For 2024 MERP (2024 MERP EE)

| Details	
$1.00 claim on 1/1/2024 For John Doe	
Claim Status: Pending Receipt Receipt Status: Required	
Pending Amount	$1.00
Paid Amount	$0.00

Receipts

New Receipt

No receipts found
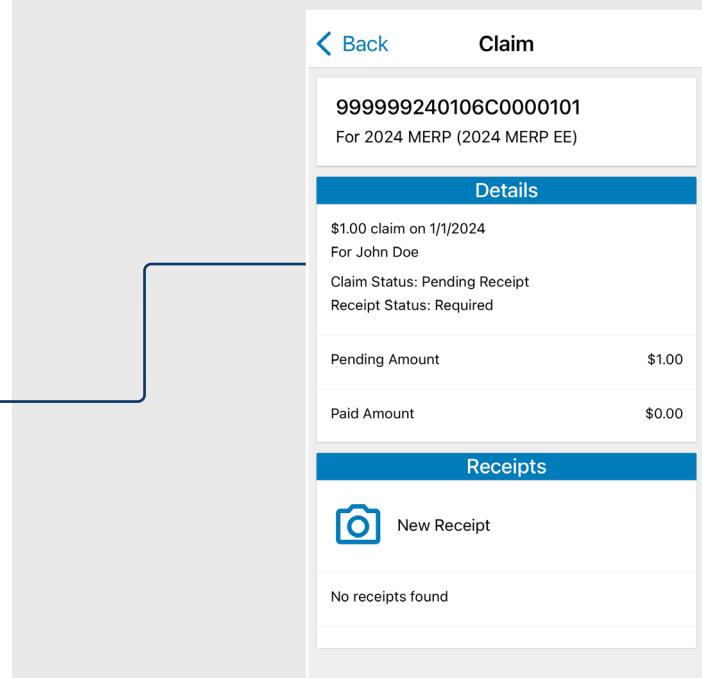
HOW DO I REPORT A MISSING DEBIT CARD AND/OR REQUEST A NEW CARD?

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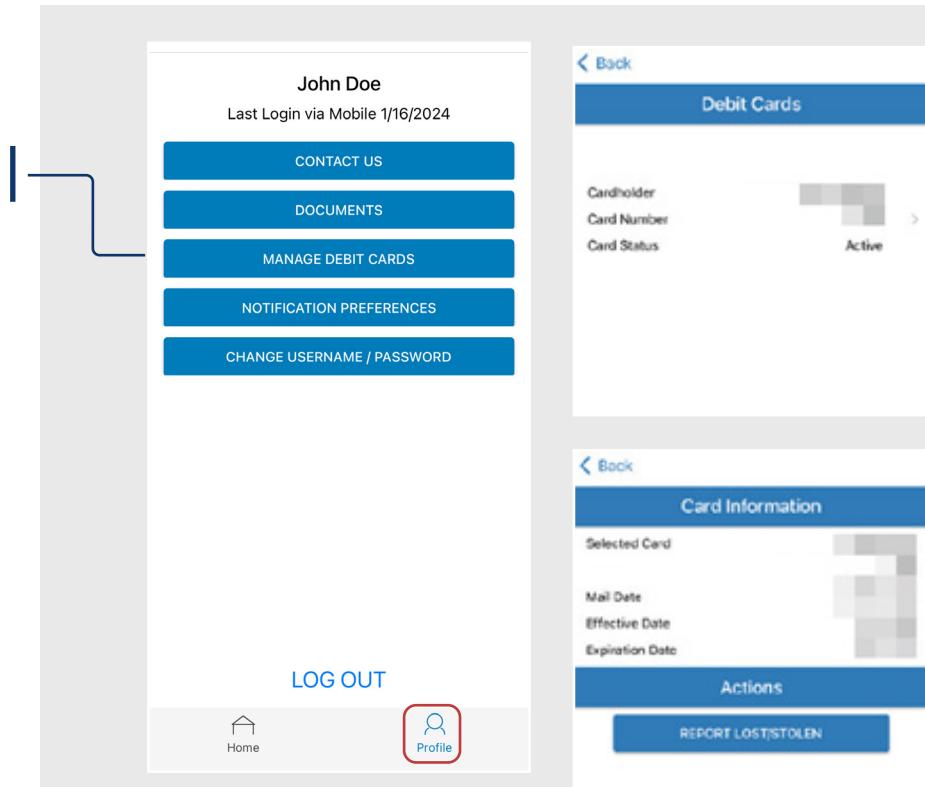
HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

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.)
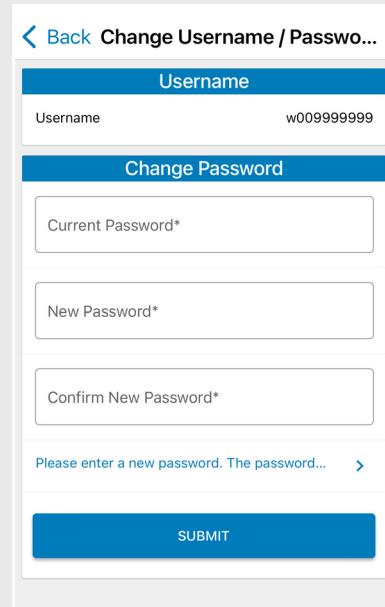
HOW DO I GET MY REIMBURSEMENT FASTER?

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.
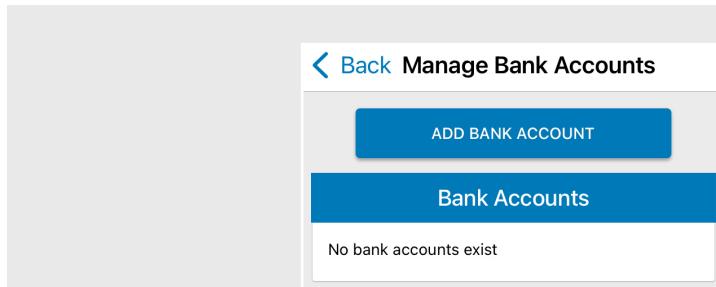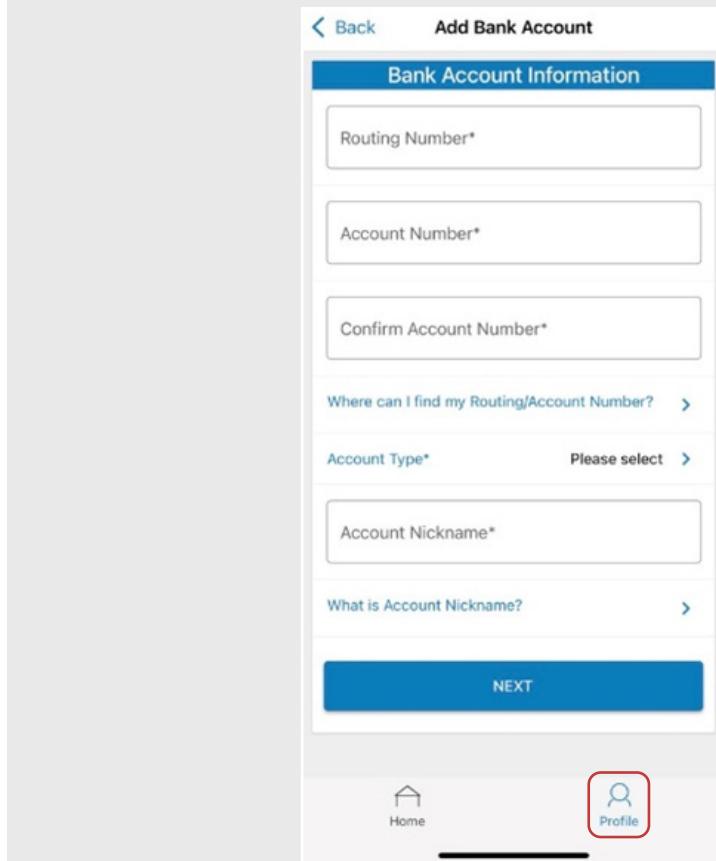
HOW DO I VIEW OR ACCESS:

…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.

Documents

< Back

Rules and Agreements
Biometric Agreement ⟩
SIGIS End User License Agreement ⟩

Statements
No statements available at this time.

Notifications
Receipt Reminder ⟩
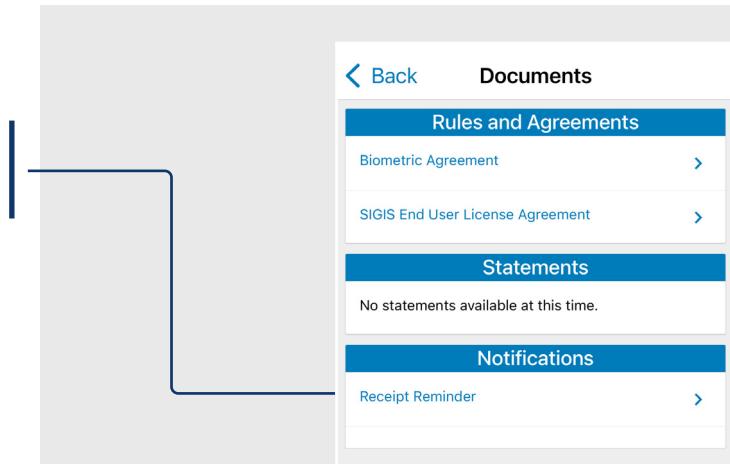
3. In addition, you can manage notification preferences by going to the Profile tab and clicking Notification Preferences.

Notification Preferences

< Back

Contact Info
JohnDoe123456789@yopmail.com Email
Phone not provided Contact your Administrator to add your mobile number ⚠

Claims
Claim has been filed for your account Email ⟩
Claim applied to repayment Email ⟩
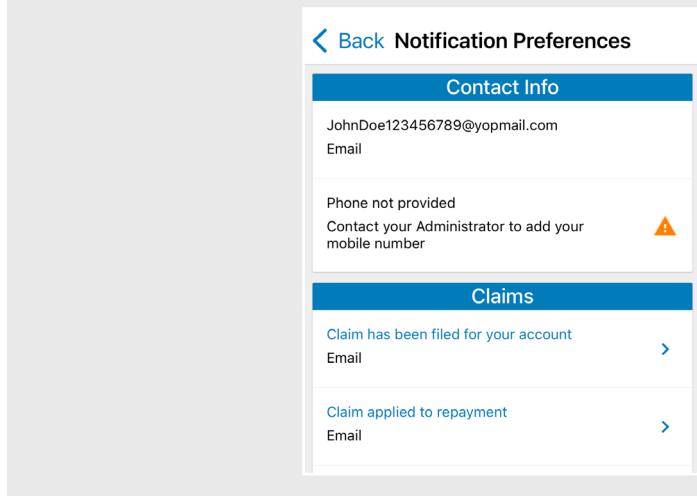
HOW DO I VIEW OR ACCESS:

...DOCUMENTS & FORMS?

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

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