

CDA CONSUMER PORTAL | QUICKSTART GUIDE

Welcome to your CDA Benefits Account Consumer Portal.

This one-stop portal gives you 24/7 access to view information and manage your available accounts administered by CDA, LLC. It enables you to:

- View account balances
- View your account activity, claims history and reimbursement history
- File a claim online
- Upload receipts
- Change your login ID and/or password

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

1. Work from sections within the Home Page,
2. Hover over or click on the tabs at the top.

From your Home Page you can view and navigate through your plan:

- The **Accounts** section shows your enrolled account types and available balances. Each account's name is a link to that Account's Summary page, where you can see more information on that account.
- The **I Want To** section includes the button to File A Claim.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Recent Transaction** section displays the last 3 transactions on your account(s). Select [View Full Table](#) to be taken to the Dashboard to view all transactions.
- The **Quick View** section graphically displays the breakdown of elections and claims by categories.

You may also navigate to these same areas as well as Tools & Support, Profile and Message Center using the menu tabs across the top of the portal.

The screenshot displays the CDA Consumer Portal interface. At the top right, the user is identified as JUNET JACKSON with a 'Logout' link. The main navigation menu includes Home, Dashboard, Accounts, Tools & Support, Profile, and Message Center. The 'Tasks' section shows a recent payment of \$103.01. The 'I Want To' section features a 'File A Claim' button. The 'Recent Transactions' table lists three transactions:

DATE	SERVICE	MEMBER/DEPENDENT	REIMBURSEMENT	AMOUNT	STATUS
10/20/18	Dental	JUNET JACKSON	-	\$12.04	✓
8/1/2018	Vision	JUNET JACKSON	-	\$75.94	✓
8/1/2018	Dependent Care	JUNET JACKSON	KINDERGARTEN	\$4,000.00	✓

The 'Accounts' section lists three 2018 accounts: 2018 Dependent Care Account (\$0.00), 2018 Health FSA (\$1,285.00), and 2018 Integrated HRA (\$409.00). The 'Quick View' section contains two pie charts: 'Paid Claims by Category' and 'Election Summary 2018'. The election summary shows three categories: 2018 Dependent Care (\$4,000.00), 2018 Health FSA (\$1,285.00), and 2018 Integrated HRA (\$409.00).

HOW DO I REGISTER AS A NEW USER?

- Go to <https://cdatpa.lh1ondemand.com/>
- LOGIN: On the right, under *New User?* Select [Create your new user and password](#)
- STEP 1 OF 3: Complete the User Identification Required Information of the Employee and click [Next](#). *(You must enter the information as it was provided on the enrollment form. If you are unable to proceed because the system states it does not recognize the information entered, please contact CDA for assistance.)*
- STEP 2 OF 3: Complete the Security Questions and click [Next](#).
- STEP 3 OR 3: Set your desired Username and Password then click [Submit](#).
- **Make a note of your Username and Password; you are now ready to login and access your online portal.**

The registration process consists of four steps:

- Login**: Select [Create your new user and password](#) under *New User?*
- User Identification (Step 1 of 3)**: Complete the required information and click [Next](#).
- Security Questions (Step 2 of 3)**: Answer the security questions and click [Next](#).
- Change Username and Password (Step 3 of 3)**: Set your desired Username and Password, then click [Submit](#).

HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Profile** tab, and click **Login Information** on the left-hand navigation bar.
2. Follow instructions on the screen.
3. Click **Save**.

The user profile page shows the following navigation and options:

- Top navigation: Home, Dashboard, Accounts, Tools & Support, **Profile**, Message Center 3, I Want to: ▼
- Left-hand navigation: Profile, Banking, Payment Method, **Login Information**
- Main content: **Login Information**
 - Password** [Change Password](#)
 - Username** [Change Username](#)
 - Security Questions** [Change Security Questions](#)

HOW DO I FILE A CLAIM AND UPLOAD DOCUMENTATION/RECEIPTS?

1. On the **Home Page**, you may simply select the “**File a Claim**” under the “I want to...” section, **OR** from any page on the portal, expand the “I want to...” section on the right-hand side of the screen.
2. The claim filing wizard will walk you through the request including entry of required information and uploading of the related documentation/receipts. *If you do not upload documentation with a claim, the claim will deny for no documentation.*
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in the **Transaction Summary**, agree to the terms and conditions click **Submit** to send the claims for processing.
5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission.

NOTE: If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page. Simply click to expand the line item to view claim details and the **upload link**.

