

# How To: Mobile App

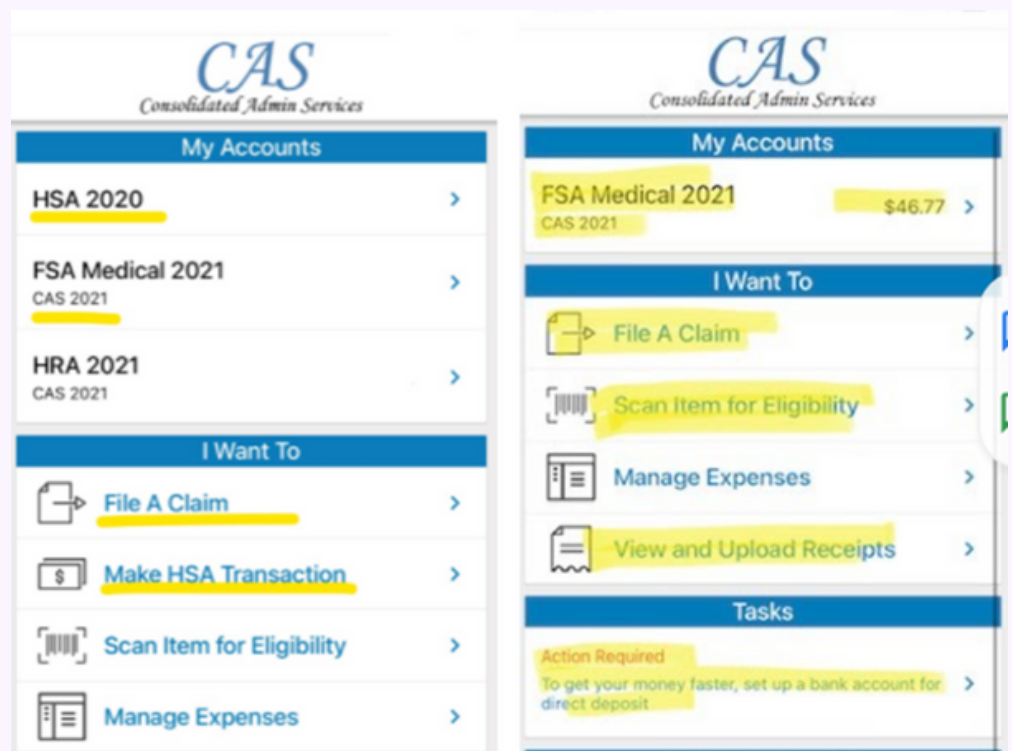


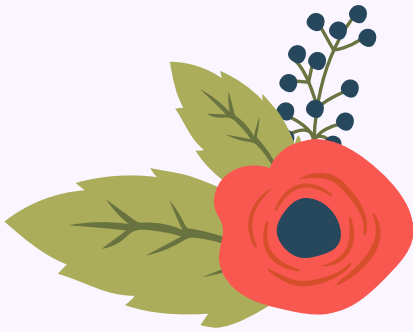
## CAS MOBILE APPLICATION WALKTHROUGH

- Available for Android and Apple Products
- Search the app store for: **Consolidated Admin Services**
- Install the App. The icon will be white with blue letters.
- Once installed, open the app.

### NEW USER

- New User? SET UP YOUR ACCOUNT
- Confirm Identity
  - First Name
  - Last Name
  - Zip Code (of Current Address)
  - SSN
  - Employer ID (Note: On the following screen please use your SSN, because we may not have your employee ID on file.)
- Next (if there is any issue with the previous step call 877-941-5956)
- Set a Username
- Password (One Uppercase letter, Lowercase letter, Number, Special Character)
- After this step your screen may look like one of the images on the right:





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## **Existing User**

- If you cannot remember your Username try entering your first initial, full last name and the last 4 of your SSN in all lowercase letters, the username is case sensitive as well.
- You can also use the forgot password or contact us for additional assistance.

## **Tasks**

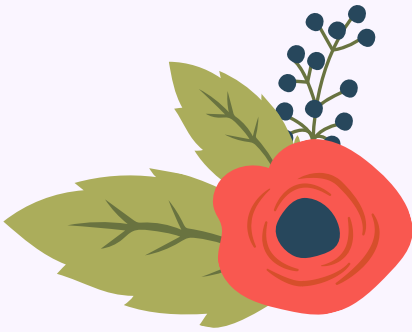
- If there are any pending reimbursements, they will show up here.
- A common notification in the Tasks is the bank account activation information quick link.

## **I WANT TO: File a claim**

- o Pay From: (Flexible Savings Account, Dependent Care, Limited Purpose Flexible Savings Account, & HRA)
- o Pay To: (Usually self or Dependents)
- o Upload receipt (From Mobile device storage)
  - JPG, JPEG, GIF, PNG or PDF
  - Maximum upload Four Receipts
- o Pay Amount (Please put the exact amount that would like to be received from these uploads)
  - Note if this is put in incorrectly a new claim will have to be made with the correct amount.
  - Note: if a claim in a PENDING REINBURSTMENT or RECIEPT REQUIRED, the status of the claim is Pending.

## **Make an HSA Transaction**

- o From: HSA
- o To: Check or Direct Deposit(If Setup)
- o Confirm Address is correct
- o Frequency: One Time or Schedule Payment
- o Amount (Entire amount for which you would like to be reimbursed)
- o Expense:
  - Medical, Dental or Vision Expenses or Other
- o Recipient/Patient
  - Self or Dependents
- o Any Details that is needed for the claims



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## **Scan Items for Eligibility**

- Allow access to camera of phone
- Scan barcodes on back or front camera with focus on

## **Manage Expenses**

- See Debit Card Transactions from Current Year
- Manage Claims and Progress of Current Claims
- Note: Uploading expenses through Manage Expenses **will not result in a reimbursement**. You must use either File a Claim or Make an HSA Transaction to be reimbursed. This feature is only for expense tracking.

## **Bank Account Setup Help**

- Verify Bank Name
- Add Street Address (As listed on check)
- City
- State
- Zip Code
- Account Type (Checking or Savings)
- Routing Number
- Account Number
- IMPORTANT: when setting up a bank account there will be a Transaction of \$1.00 USD or less. In order to setup/activate bank account there will be a link in the TASKS section and input the amount that was deposited into the account for activation. If this is done incorrectly the bank account will fail and the process will have to be completed again).

## **Questions? Contact Us:**

Phone Number: (877) 941-5956

Fax Number: (877) 641-5956

Email: [info@consolidatedadmin.com](mailto:info@consolidatedadmin.com)