

## Guide to Substantiating Debit Card Charge(s) via Consumer Portal

1. Log onto your Consumer Portal
2. From the 'Home' page, place your cursor over 'Accounts' and select 'Expenses'
3. Next screen will display the charge(s) requiring follow-up documentation
4. Click on the + to expand the charge details.

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
+ 2/22/2021	Vision	Participant Name	EYES FOR YOU CORDOVA	\$354.00	\$

5. This will bring down the details of the charge where you can do one of two options:
  - A. **Upload** your Itemized Statement or EOB (Explanation of Benefits) based on your employer's plan requirements, by clicking on **Upload Receipt(s)** and follow instructions.

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
- 2/22/2021	Vision	Participant Name	EYES FOR YOU CORDOVA	\$354.00	\$
Payment Details		Date(s) of Service: 2/22/2021 - 2/22/2021	Claim Number: CPNWEX210224D0000201		
		Requested On: 2/24/2021	Account: HRA 2021		
		Expense Category: Optometrists, Ophthalmologist...	Paid: \$354.00		
		Source: Debit Card	Receipt Status: Received		
<a href="#">Upload Receipt(s)</a>					

OR

- B. **Print** your debit card form by clicking on the **Claim Number** so you can submit along with your Itemized Statement or EOB (Explanation of Benefits) based on your employer's plan requirements and send to CPN, Inc., via fax, mail, or email.

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
- 2/22/2021	Vision	Participant Name	EYES FOR YOU CORDOVA	\$354.00	\$
Payment Details		Date(s) of Service: 2/22/2021 - 2/22/2021	Claim Number: CPNWEX210224D0000201		
		Requested On: 2/24/2021	Account: HRA 2021		
		Expense Category: Optometrists, Ophthalmologist...	Paid: \$354.00		
		Source: Debit Card	Receipt Status: Received		

After you click on the claim number, the following screen, you'll click on "**View Confirmation**" in order for the claim form to pop up so you can print. (Pop-ups must be enabled).