# CapRelo

# Companion by CapRelo Portal

**Employee User Guide** 

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# **Employee: Login**



Go to www.caprelo.com and click on Companion Login or directly at www.portal.caprelo.com.

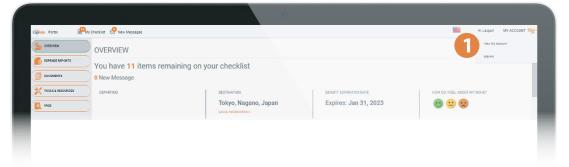
Enter the unique username and password provided by CapRelo. If you need to reset your password click on the 'Forgot Password' link.



### **Overview**

**1.** Hover over the My Account in the top right-hand side of the screen to select View My Account or to Log Out of the Portal.

2. Selecting View My Account will take you to the My Account screen where you can view your Key Information including your e-mail address and policy



OVERVIEW			ß	6			
6 EXPENSE REPORTS							
DOCUMENTS	Key Information Personal Inform	ation Relocation Counselor	Change Password	Setup My ACH	Setup Mail Address		_
TOOLS & RESOURCES	Your request has been sent to	the counselor for review.					
_							
	onal Information to vi						encil
icon to make c	hanges and click Upo	date. Any propo					encil
icon to make c		date. Any propo					encil
icon to make c counselor prio	hanges and click Upo	date. Any propo your portal	osed chang	jes will be			encil
icon to make c counselor prio <b>4.</b> Access your	hanges and click Upo r to being updated ir counselor details inc	date. Any propo your portal cluding email a	nd phone i	jes will be number	reviewed	by your	
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<ul> <li>icon to make c counselor prio</li> <li>4. Access your</li> <li>5. Reset your p must contain as character</li> <li>6. Enter your b</li> </ul>	hanges and click Upo r to being updated in r counselor details inc password. Please note t least one uppercase	date. Any propo a your portal cluding email a the criteria: <i>Pa</i> <i>letter, one lower</i> be below for fur	nd phone i assword mu rcase letter,	ies will be number <i>ust be grea</i> <i>one numb</i> nation	reviewed ter than 7 er and on	by your characters e special	

To Enter your Bank Details, click on "Set up My ACH". You will be taken to the My Account screen.

#### Language

The portal is available in several languages. The language selection will vary based on your company's preferences. To change the language of the portal, select the relevant flag e.g. French flag for France

OVERVIEW	OVERVIEW			5
EXPENSE REPORTS	You have 11 items rema	aining on your checklist		•
DOCUMENTS	0 New Message			
TOOLS & RESOURCES	DEPARTING	DESTINATION	BENEFIT EXPIRATION DATE	HOW DO I FEEL ABOUT MY MOVE?
FAQS		Tokyo, Nagano, Japan	Expires: Jan 31, 2023	🙂 😑 😒

### **Bank Information**



**1.** To add a new Account, click on 'Add New ACH Account' which will present you with a form to complete

2. Click on View/Edit or Delete to amend existing account information

CapRelo Portal	Checklist 🕑 New	Messages			Hi Jasper!	MY ACCOUNT
	MY ACCO	UNT				
	Key Information	Personal Information Relocation Counselor	Change Password Setup My ACH	Setup Mail Address		
DOCUMENTS	ACCOUNT ID	BANK NAME	ACCOUNT NAME		Add New	ACH Account
TOOLS & RESOURCES	1811	Bank of America - (Primary)	Jasper Beardly		2 View / Edit	Delete
CapRelo						

#### **Bank Information My Account**

**1.** Complete the requested bank information and click "Save".

Please note it is **VERY IMPORTANT** to complete and submit this form correctly. If this information is inaccurate, payment will be delayed.

Capital Portal	Checklist 🤗 New Messages
MESSAGE BOARD	MESSAGES Release Notes   MAY 26
C EXPENSE REPORTS	New Message Board Welcome to our new message board! Community Information, news releases, and technical release notes will appear here.

# **Message Board**

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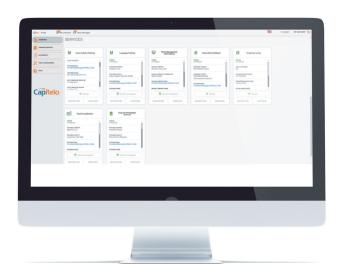
The latest updates and community information will be available here.

# **Dashboard: Overview**

**1.** This is your relocation timeline. Items in the past are shown in orange. The next milestone is shown in green, and future milestones are in gray

**2.** At any time during your relocation, you can submit a pulse check by clicking on the appropriate emoji





### **Services: Supplier**

Click on the Service cards to see details of the selected suppliers that will be providing your services e.g. click on the Temporary Living service card to see details of your temporary living service provider.

### **Services: Description**

Here you will find a description of services you have initiated for your move.

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5 vever	SERVICES						
	M Dress Colleged Training	M Legange Training	Mon Management	B mandar bellage	Tengeray Ling		
DOCUMENTS		100.00		And the second s	La management		
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### **Expense Report**



- 1. Click on the "Expense Reports" link on the left side of the home screen
- 2. Create your expense report and upload documents to your computer or smart device
- 3. Check the status of your submitted expenses

**4.** You can also setup your payment preference and bank information from the Expense Report screen. See **Bank Information** section above for further details

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		ISE REPORTS						Setup ACH	Add Expense Report
TOOLS & RESOURCES	ALTROPHIC IN	REPORT NAME	FROM DATE	TOGATE	SUBMITTED AMOUNT	APPROVED	WITHHELD	PAID	STATUS
KAQS	1622	Test mobile	03-Feb-2021	05-Feb-2021	\$100.00	\$0.00	\$0.00	90.00	SLEMITED
	1621	Test Report	29-Jan-2021	05/Feb-2021	\$1575.00	\$0.00	80.00	\$0.00	BUBMITTED
CapRelo									

### Add Expense Report

Click on **Expense Reports (1)** on the left hand menu to add a new expense. Click on **Add Expense Report (2)** which will take you to the expense report screen. The **"Report Name" (3)** should briefly describe the policy component being submitted (e.g. Final Move). The **"Begin Date"** and **"End Date"** (4) should be relevant to the expense report being submitted and may represent the date range trip or period the expense(s) fall under. Enter currency preference in the **"Remit Currency" (5)** field.

overvew	y Checklist 🧬 New Messages						Hi Jaspert MY ACCOUNT 08
EXPENSE REPORTS	3						Add Expense
DOCUMENTS	REPORT NAME		CATEGORY		TYPE		OPTIONS #
TOOLS & RESOURCES		4	Select		• Delect		•
FAQ5	REMIT CURRENCY		SUBMITTED AMOUNT	CURIENCY Select	BEGIN DATE		RECEPT
	Select REMIT METHOD						
	Update Remit Method and Details		SAVE AS	TWN	CANCEL	SUBMIT FOR	JPPROVAL
apRelo							

# Lookup Expense Report

To view a submitted expense report, click on the expense report ID or Status (1 or 2) to be taken to the **Expense Report Screen.** 

	MY EXP	ENSE REPORTS				Set	up ACH	🕂 Add Ex	pense Report
	Search								Q
TOOLS & RESOURCES	REPORT ID	REPORT NAME	FROM DATE	TO DATE	SUBMITTED AMOUNT	APPROVED	WITHHELD	PAID	STATUS
FAQS	1622	Test mobile	03-Feb-2021	05-Feb-2021	\$100.00	\$0.00	\$0.00	\$0.00	SUBMITTED
	1621	Test Report	29-Jan-2021	05-Feb-2021	\$1575.00	\$0.00	\$0.00	\$0.00	SUBMITTED

#### This screen provides detailed information pertaining to the submitted expense

1. Select Back to return to the My Expense Reports Screen

**2.** You may search for and manage documents from this screen

3. Documents can also be uploaded from this screen

**4.** When uploading a document enter a unique description. Please note that the original file name will also be visible

- 5. Select if you would like the document to be visible to your employer
- 6. Upload the document (note that maximum file size to upload is 4MB)

**7.** Select Save to complete the upload process

Documents can be downloaded simply by selecting the document.	Caprelo Portal	v Checklist 🥺 New Messages	©.	Hi Jasperi MY ACCOUNT 😋
<i>Note:</i> once a document is uploaded and employer visibility is selected,	OVERVIEW  C EXPENSE REPORTS  C DOCUMENTS	DOCUMENTS Search 2		<b>B</b> Upload
you will need to reach out to your counselor to delete or amend.	TOOLS & RESOURCES	TITLE Globex Corporation LOU - J.Beardly	DESCRIPTION Mock LOU for testing	04TE09 Apr 2021
		Globex Corporation LOU - J.Beardly	Draft	31-Mar-2021
Capitelo Portal Portal Portal Portal		Hi Jasper! MY ACCOUNT 💖		08-Feb-2021
		Upload		08-Feb-2021
Search Add Document	×	ها		
TOOLS & RESOURCES TITLE Visible to My Employer :		DATE		
Gicbex Corporation IC		09-Apr-2021		
Globex Corporation LC Uplead Document Upload Document		31-Mar-2021		
3155EDAF-GEA3-4361 CANCEL	SAVE	08-Feb-2021		
CapRelo Blank Document docx		08-Feb-2021		
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Act         0.Feb.2021         to         0.5Feb.2021         Find More-Transportation         Find More-Transportation           Roart Methods         Reserved         Partial Denne         Find More-Transportation         Find More-Transportation		Test mobile		03-Feb-2021		USD	100	
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# **Tools and Resources**

**1. Tools and Resources:** You will find additional information to support you with your transition such as area information and mortgage resources, along with the contact information for your mortgage lender.

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**2. Community Explorer:** Directs you to Sunray website as a resource for domestic USA area information

- **3. Global Visa Requirements:** Directs you to CIBT Visas to provide visa information
- **4. Mortgage Assistance:** Directs you to a lender partner to provide mortgage information
- 5. Mortgage Loan Application: Directs you to a lender partner to provide mortgage loan information



# FAQs

Here you will find answers to some of our most frequently asked questions.

To view the answer, click on the arrow to expand.

#### **My Checklist**

**1.** Create checklist from task items available. Task lists will reflect if you are moving internationally or within the United States

	y Checklist 🤗 New Messages 📟 Hi Jaco	
Ciptedo Portal 💾	Colorial CD International	-
COPENSE REPORTS	CREATE CHECKLIST: 13 TASK ITEMS	
COCUMENTS	It can be tough to remember everything when relocating, so we're here to make it easy. Our checklists contain everything you could possibly need to remember and with our integrate new forget one again! it's quick, simple to use and will keep you'life in motion.	d calendar, you will
TOOLS & RESOURCES	Please select items to your checklist.	- 10
		•
		5
	FURNISHED HOUSING DEPARTURE HOUSING HOUSINGLID GOODS - PACK, LOAD, MOVE & DELIVIERY DESTINATION HOUSING PERSONAL & FUNNICIAL DESTINATION	N LOCATION 1
CapRelo		
	Add all FURNISHED HOUSING items	
	If moving by self-haul, contact selected truck rental service to reserve appropriate sized truck, car dollees and any packing material needed.	
	If moving with full service, schedule survey appointment with van line for cost estimate and packing needs assessment.	- 11
	Receive and review information from van line on household good shipment insurance and claims procedures.	
	Schedule pack, load and delivery dates with selected van line carrier and arrange storage, if needed.	

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#### **New Messages**

1. You will be alerted to any new messages from your dashboard. To view and search messages, click on **New Messages**, which will take you to **My Inbox** 

#### **Chat with Counselor**

1. Chat with your Counselor directly in the portal by clicking on **Start Chat** with **Counselor.** Chats will be saved and accessible in the **My Inbox** screen for future reference

*Note:* If the Counselor is not online at the time you start the chat they will receive an e-mail of your message.

