

# Companion by CapRelo Portal

*Employee User Guide*







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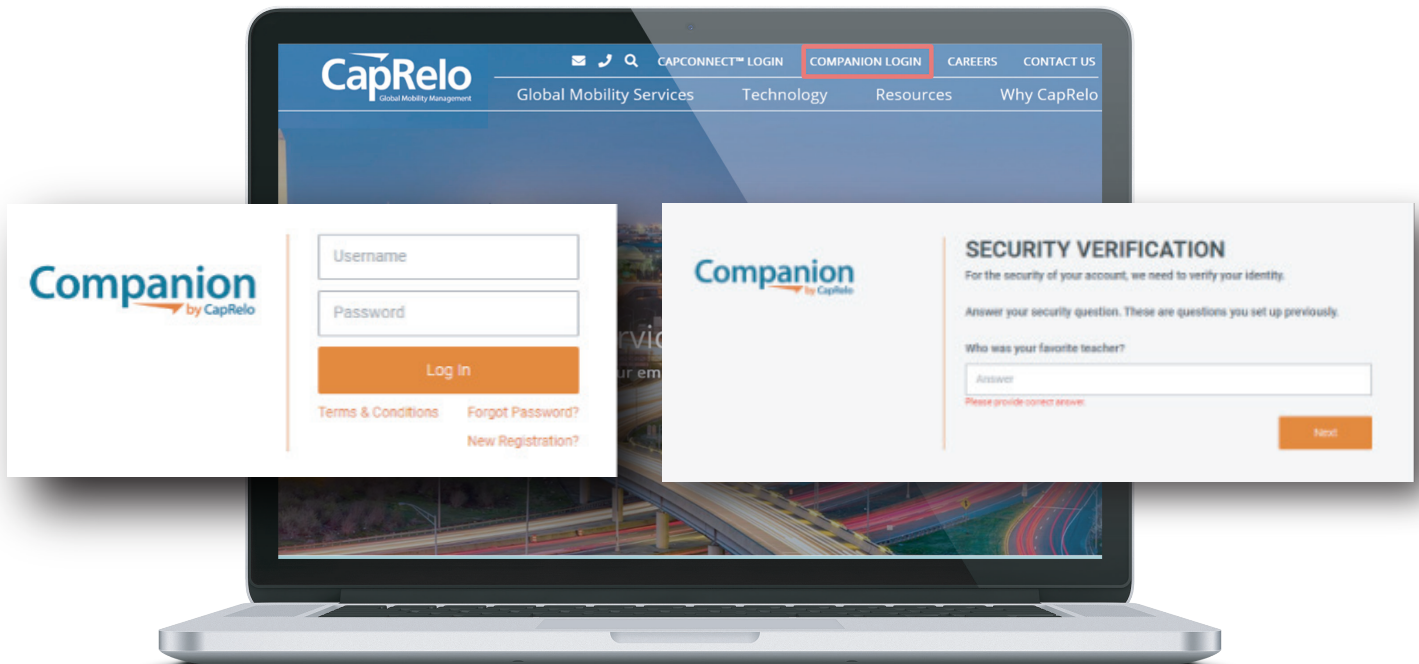
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# Employee: Login

Go to [www.caprelo.com](http://www.caprelo.com) and click on Companion Login or directly at [www.portal.caprelo.com](http://www.portal.caprelo.com).

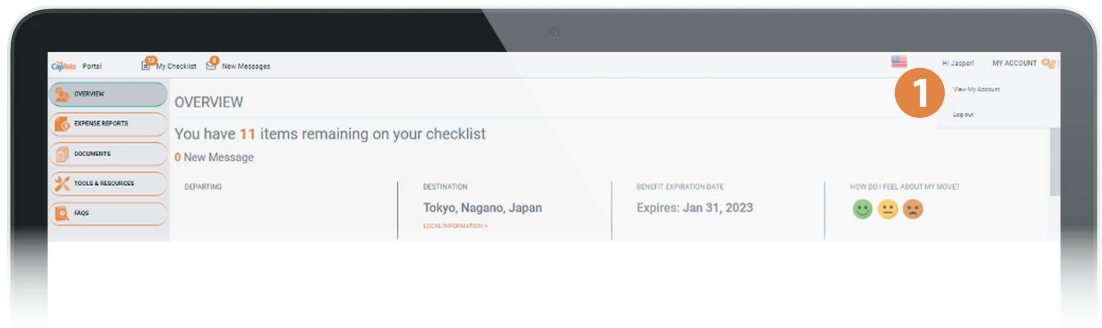
Enter the unique username and password provided by CapRelo.  
If you need to reset your password click on the 'Forgot Password' link.

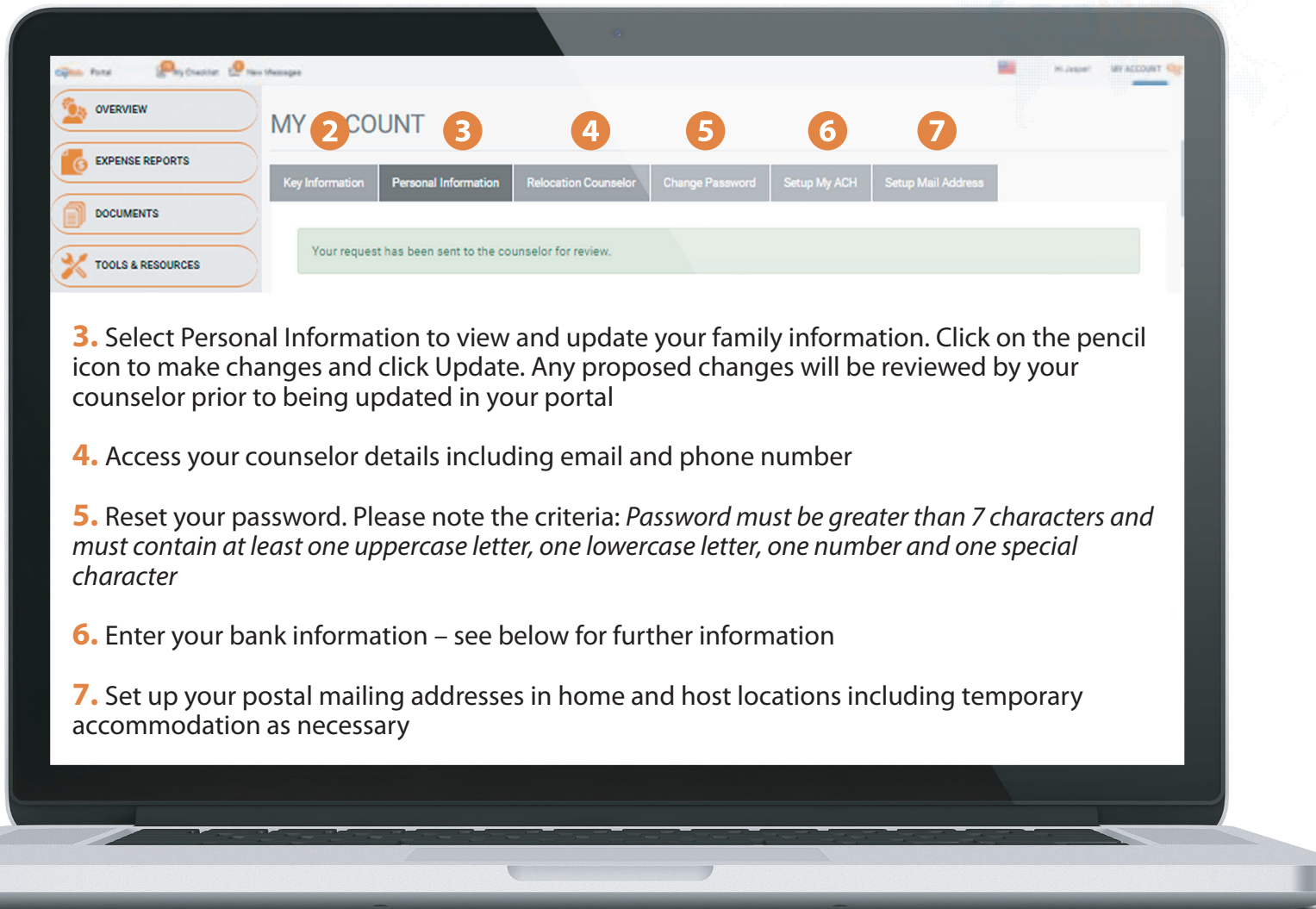


## Overview

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



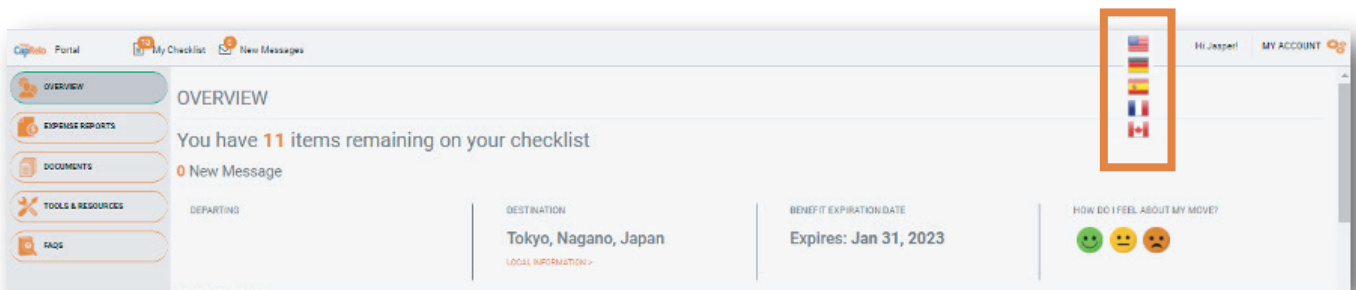


3. Select Personal Information to view and update your family information. Click on the pencil icon to make changes and click Update. Any proposed changes will be reviewed by your counselor prior to being updated in your portal
4. Access your counselor details including email and phone number
5. Reset your password. Please note the criteria: *Password must be greater than 7 characters and must contain at least one uppercase letter, one lowercase letter, one number and one special character*
6. Enter your bank information – see below for further information
7. Set up your postal mailing addresses in home and host locations including temporary accommodation as necessary

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

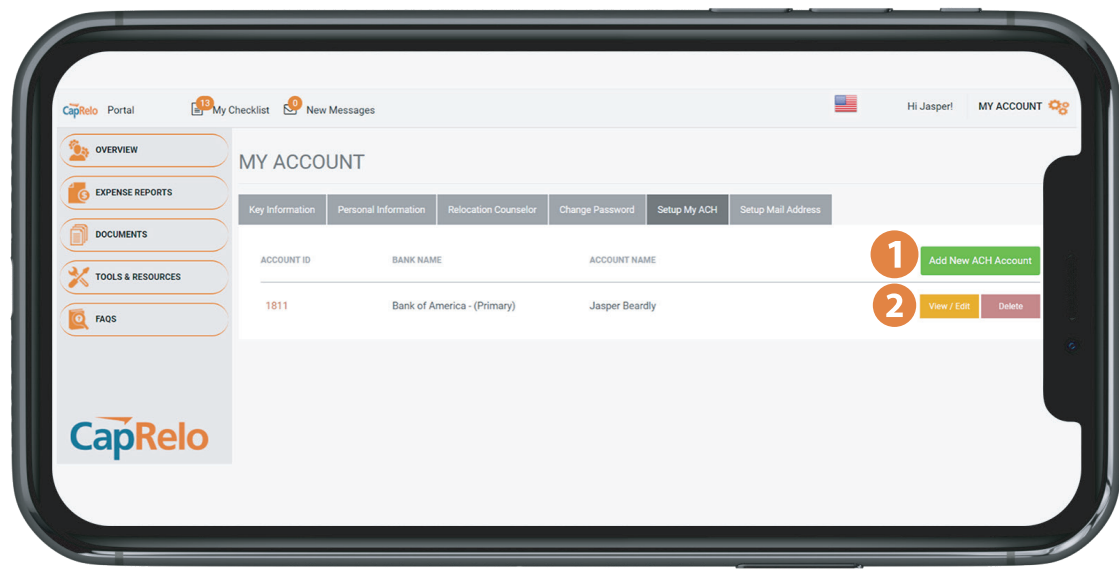






## Bank Information

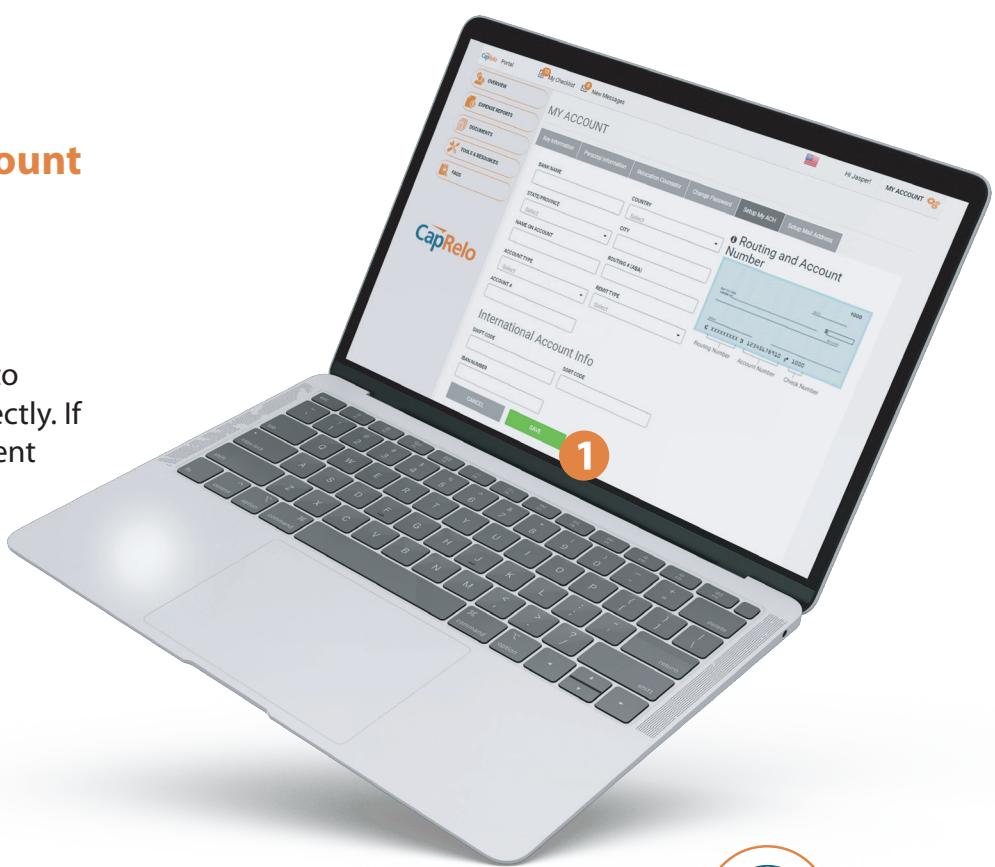
1. To add a new Account, click on 'Add New ACH Account' which will present you with a form to complete
2. Click on View/Edit or Delete to amend existing account information

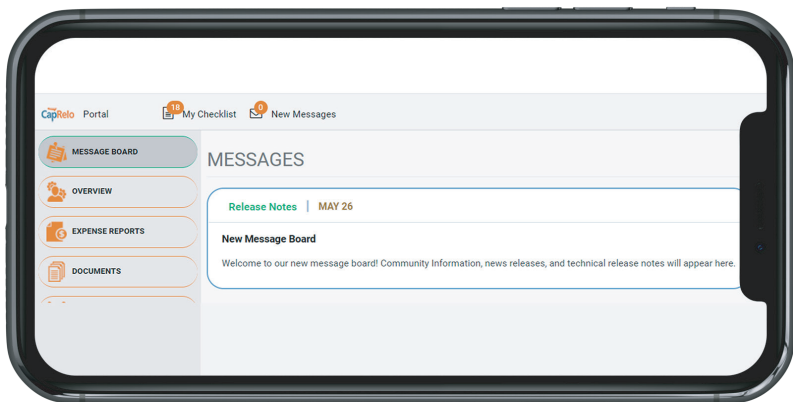


## Bank Information My Account

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.





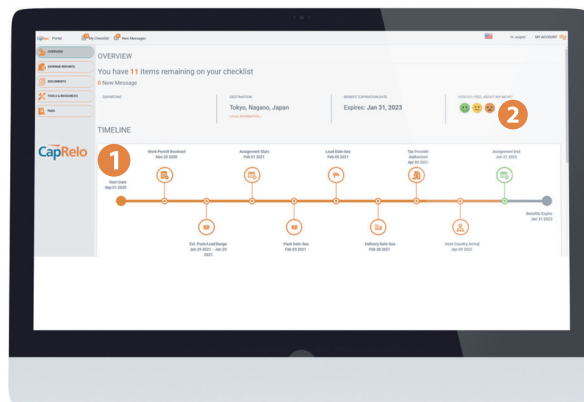
## Message Board

The latest updates and community information will be available here.

## Dashboard: Overview

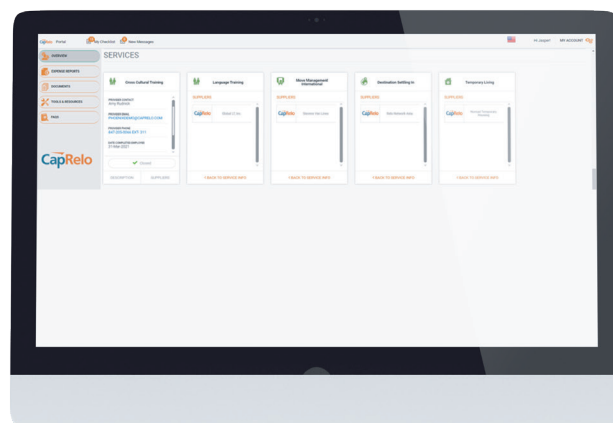
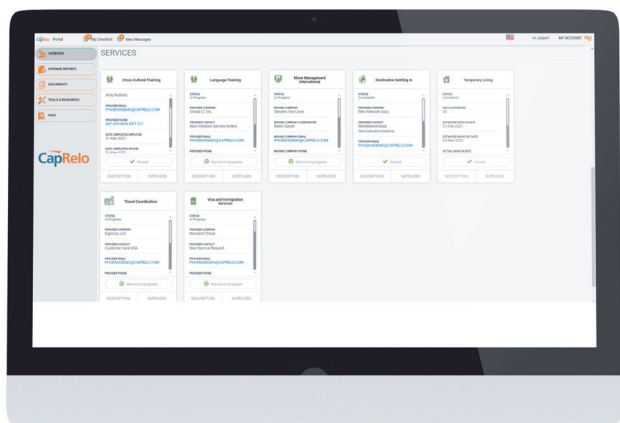
1. This is your relocation timeline. Items in the past are shown in orange. The next milestone is shown in green, and future milestones are in gray

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



## Services: Description

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



## 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.

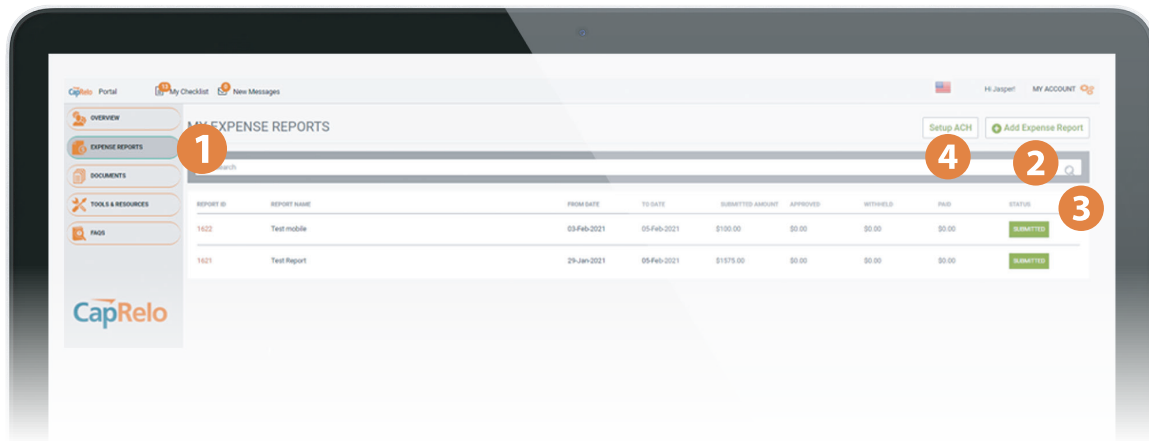






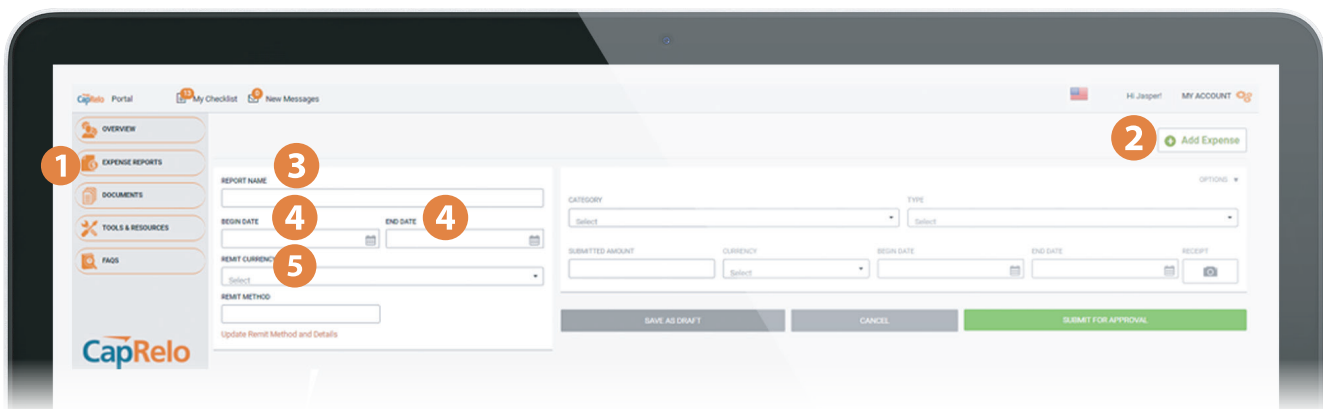
# Expense Report

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



# Add Expense Report

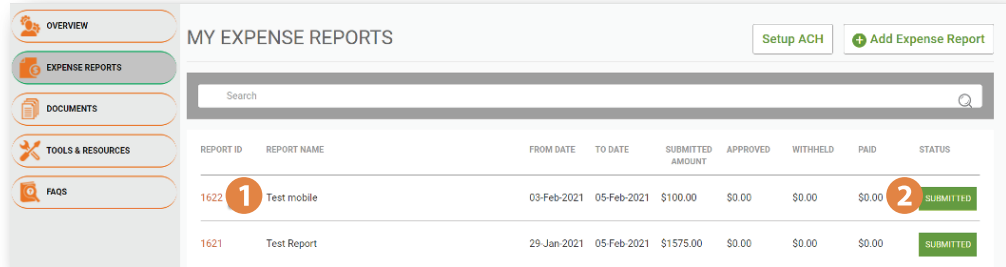
Click on **Expense Reports (1)** on the left hand menu to add a new expense. Click on **Add Expense Report (2)** which will take you to the expense report screen. The **“Report Name” (3)** should briefly describe the policy component being submitted (e.g. Final Move). The **“Begin Date”** and **“End 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.



# Lookup Expense Report

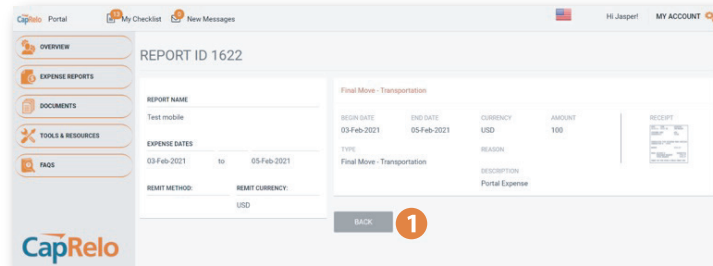


To view a submitted expense report, click on the expense report ID or Status (1 or 2) to be taken to the **Expense Report Screen**.



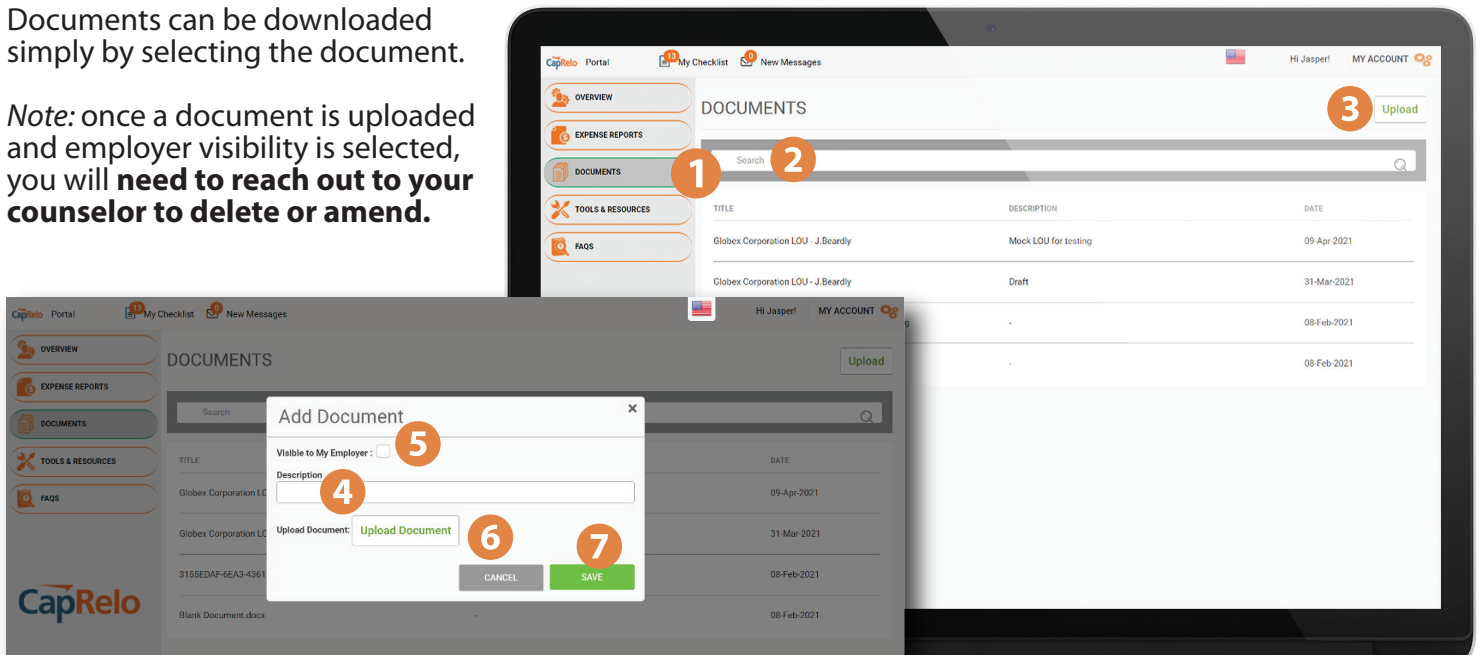
*This screen provides detailed information pertaining to the submitted expense*

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.

**Note:** once a document is uploaded and employer visibility is selected, you will **need to reach out to your counselor to delete or amend.**





# 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.
- 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
- 6. Calculators:** Directs you to a lender partner for home loan, insurance and banking calculators
- 7. Rental Assist (US):** Directs you to a lender partner for US rental information
- 8. Global Resource Center:** Directs you to "Living Abroad's" international relocation center website as a resource for country guides and general information



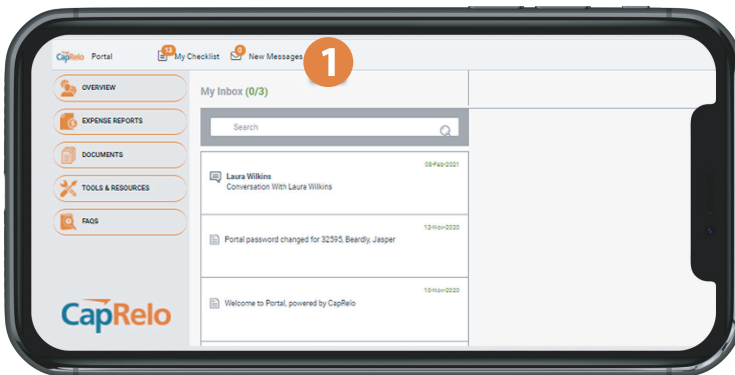
# FAQs

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



## 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.

