

CapConnect by CapRelo Portal

CapRelo



Client User Guide





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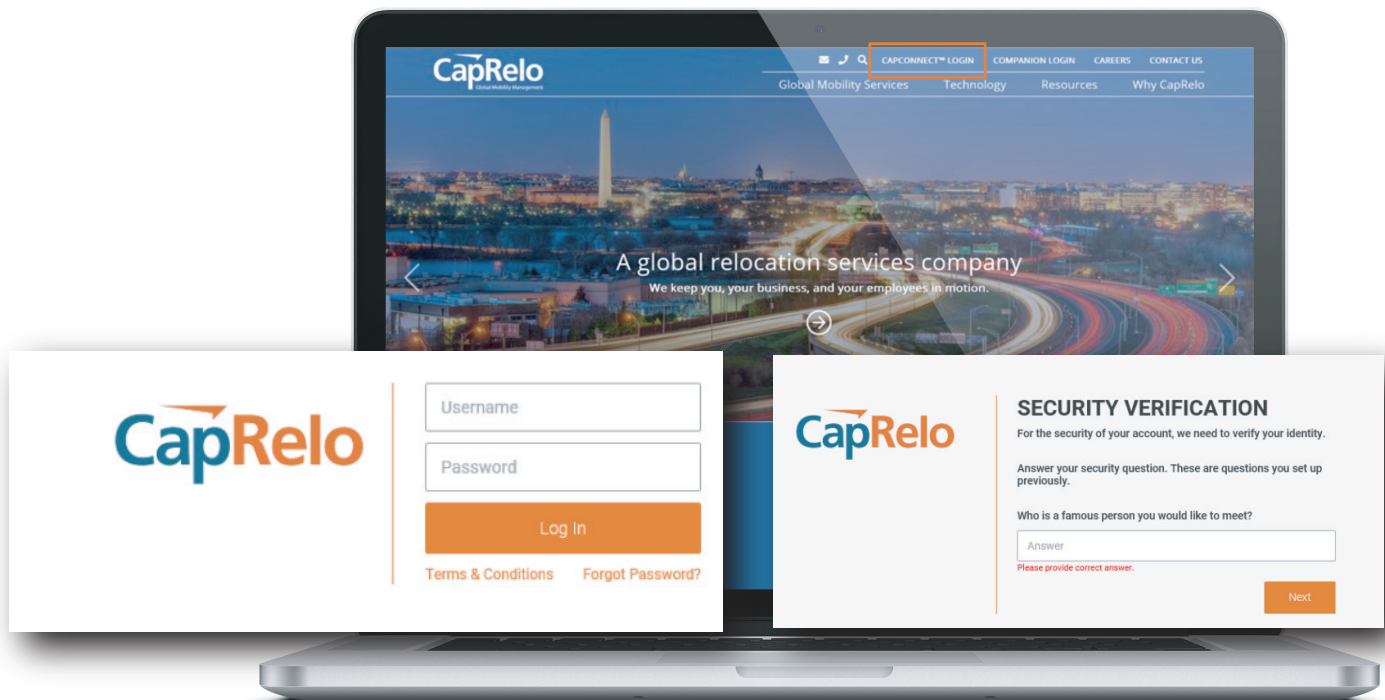


Client: Login

Go to www.caprelo.com and click on CapConnect Login or directly at www.capconnect.caprelo.com.

Enter the unique username and password provided by CapRelo.

If you experience an issue logging in, please contact your Client Services Representative at CapRelo.



Authorizing a Relocation

1. To submit an authorization to CapRelo for a new relocating employee, click the New Authorization Service tab on the left.

Enter the employee contact information as well as the benefits/policy the client is authorizing.

2. Authorization date: Date CapRelo are authorized to provide relocation services and support to the relocating individual

3. Start date: Employee's effective start date at new location

4. Expiration date: Date the employee's relocation benefits expire per client's policy (i.e. 6 months, 1 year) or when the assignment is due to end



5. Policy: Policy and associated benefits authorized for the employee

6. Cost Centre: Cost center that will bear the costs for the employee

7. Employee type: Designate if the employee is a Candidate, New Hire or a Transfer

8. Additional notes: Add specific comments including, but not limited to: pre-authorized exceptions, employee timelines, delayed payments, special instructions, etc

9. Attachments: Option to upload copies of the repayment agreement, offer letters or other documents that pertain to the employee's relocation

10. Attachments: Privacy option to make the document visible to the relocating employee

Complete as many fields as possible. Some fields are required. Contact your CapRelo Client Services Representative if required fields need adjustment.

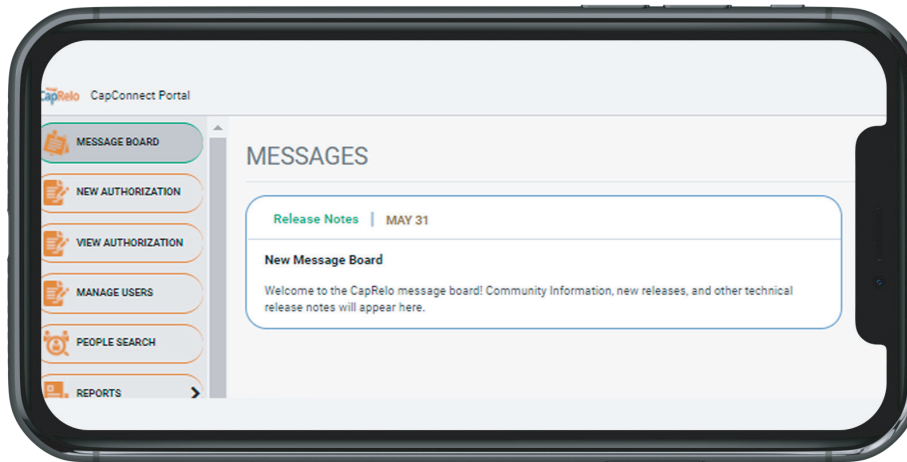
A screenshot of the CapRelo CapConnect Portal's "NEW AUTHORIZATION" form. The form is displayed on a laptop screen. A sidebar on the left contains navigation links: DASHBOARD, NEW AUTHORIZATION (highlighted with a red circle 1), VIEW AUTHORIZATION, MANAGE USERS, PEOPLE SEARCH, REPORTS, DOCUMENTS, SEARCH COST ESTIMATE, CALCULATE COST ESTIMATE, TOOLS & RESOURCES, and FAQS. The main form area is titled "NEW AUTHORIZATION" and "PERSONAL INFORMATION & ADDRESS". It includes fields for FIRST NAME, MR, LAST NAME, PRIMARY PHONE, SECONDARY PHONE, EMAIL ADDRESS, ADDRESS LINE 1, ADDRESS LINE 2, COUNTRY, STATE, CITY, and ZIP OR POSTAL CODE. Below this is the "ADDITIONAL INFORMATION" section with fields for AUTHORIZED DATE (red circle 2), START DATE (red circle 3), EXPIRATION DATE (red circle 4), CHOOSE PROGRAM (red circle 5), JOB TITLE (red circle 6), EMPLOYEE TYPE (red circle 7), RELOCATION TYPE, HOME STATUS, DESTINATION COUNTRY, DESTINATION STATE, and DESTINATION CITY. The "ADDITIONAL NOTES" section (red circle 8) has a text area. Below that is the "FORMS" section (red circle 9) with upload buttons for DOC, DOCX, XLS, XLSX, PDF, PNG, and JPG. There are three checkboxes labeled "VISIBLE TO TRANSFEREE" (red circle 10) corresponding to the attachments. At the bottom right are buttons for CANCEL, RESET, and SUBMIT (red circle 11). A modal dialog box is open in the foreground, displaying the message: "Your authorization has transmitted successfully. The reference number is 96910." with an OK button.

After clicking submit (11), the user will receive a message and identification number confirming that the authorization was successfully submitted. The user will receive a confirmation email as well.



Message Board

The latest updates and community information will be available here.



Service and Expense Overview (Dashboard)

Welcome screen

1. The Dashboard provides an overview of the mobility program. Tiles can easily be repositioned or removed. To add more tiles, simply select 'Tile Library' from the My Account menu

2. Transferee Authorization:

Choose departure or destination and toggle between domestic US and global map to view transferee authorization activity. Note that this map does not report on assignments

3. Active Moves: Total active moves where the employee is still within their benefits period i.e. before expiration date





4. Relocations: Summary of employee relocation authorization status YTD, average per month, and last year

5. Total Spend: Toggle over each bar to view Total Budget and Total Actual Remaining Spend including year to date and month to date breakdown in USD

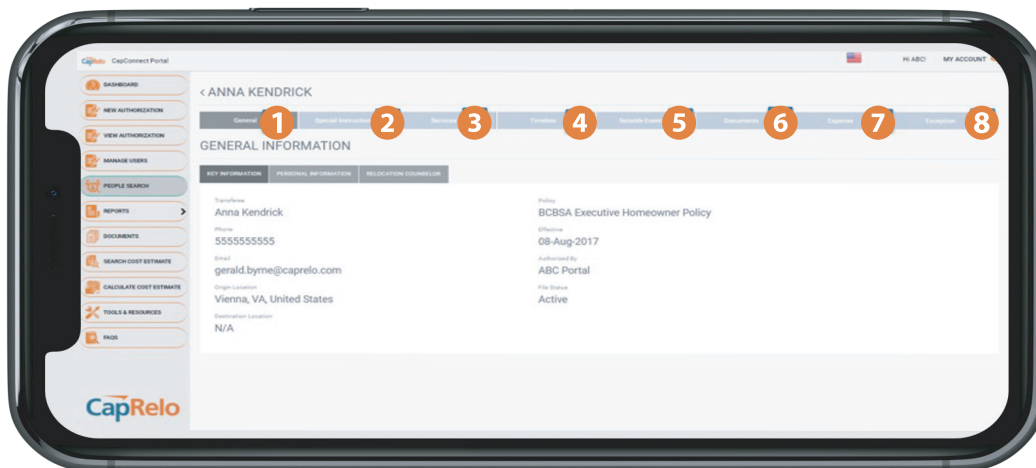
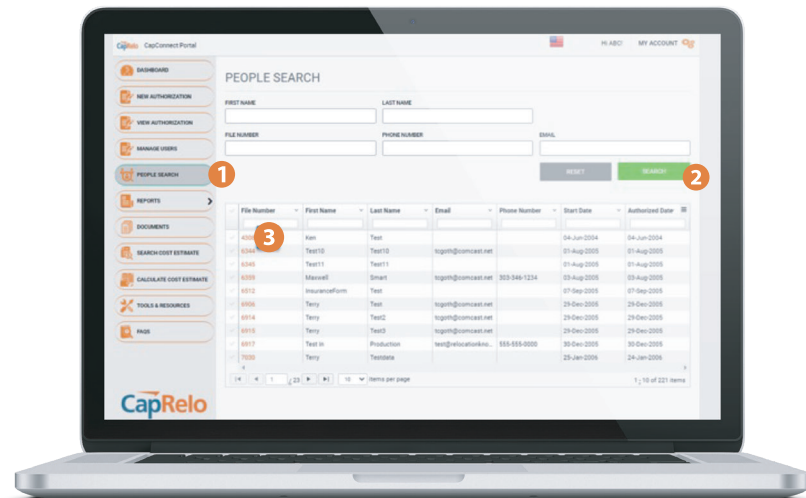
6. Average Spend Per Closed File: Average Spend per employee in USD

7. Pulse Check: Employee Pulse Check results summary

Search for an Employee

Search and view employee's relocation file.

Click on People Search (1). Enter the employee's name, file number, home or host city, state or country and click Search (2). Click Reset to refresh all fields to blank. To open an employee's file, click on the orange file number (3).



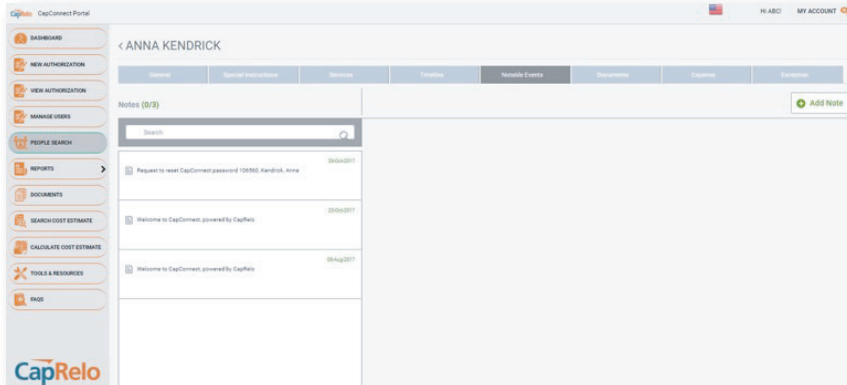
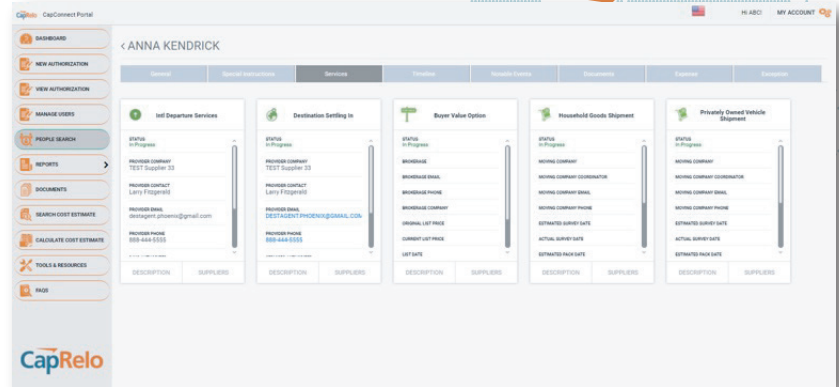
1. General: Provides employee's general contact and authorization information

2. Special Instructions: Captures the special instructions submitted with the Authorization

3. Services: Shows the services offered to employee in process

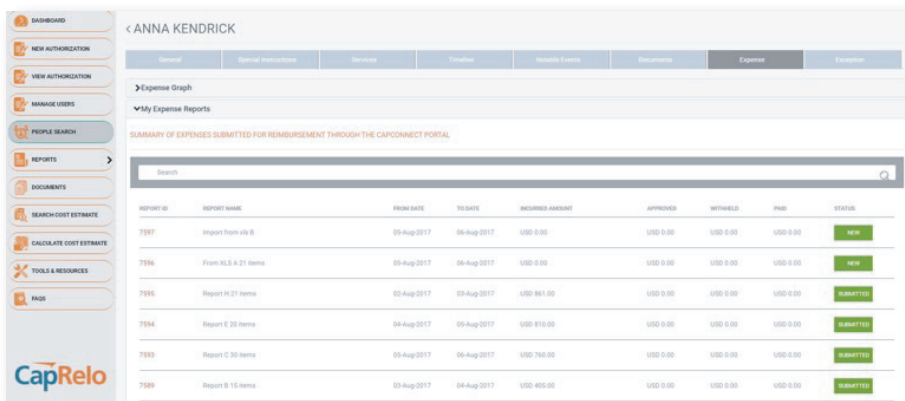
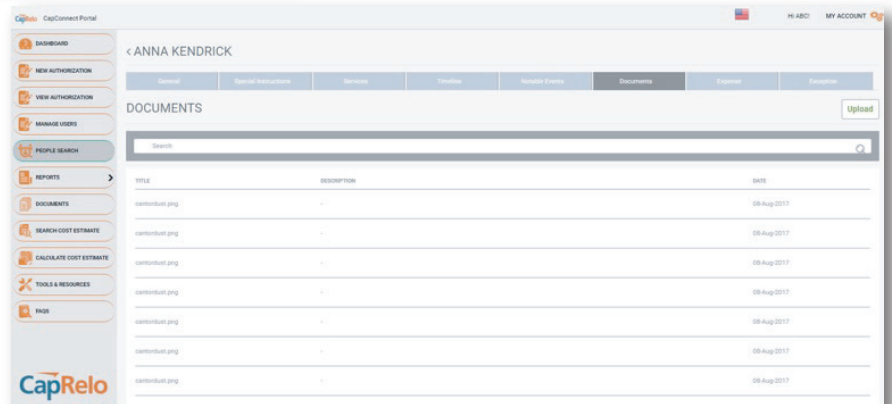


4. Timeline: Shows the key services offered to employee in process including visa and immigration applications and estimated Household Goods delivery dates



5. Notable Events: Shows record of the communications added by client or CapRelo for that relocation

6. Documents: Client may upload documents associated to a particular relocation and view documents previously uploaded (i.e. broker market analyses, temporary housing leases, etc.)



7. Expense: Displays total expenses proposed to date and compares this to any cost estimate budget (if provided)

8. Exception: Displays total exceptions requested and status. Full details of the exception can be read directly on the screen by moving cursor over the description



Running Reports

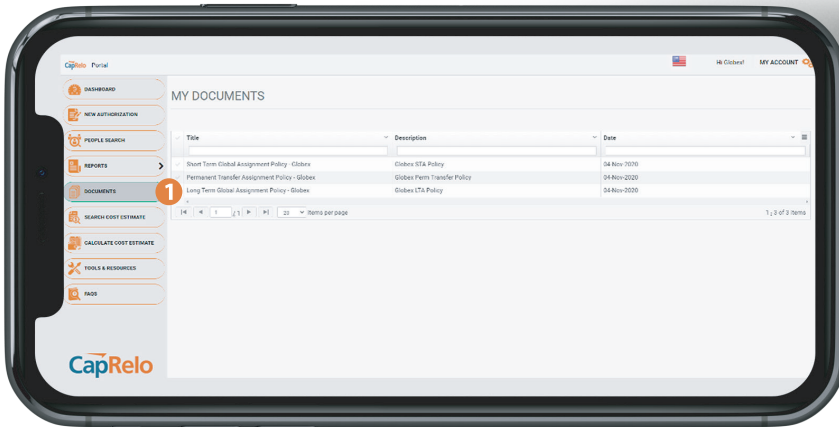
Includes core reports available on demand under the Reports tab (1). All data is real time.
Enter report criteria (2) and click Submit (3).

Export the data into Excel by clicking on menu icon 



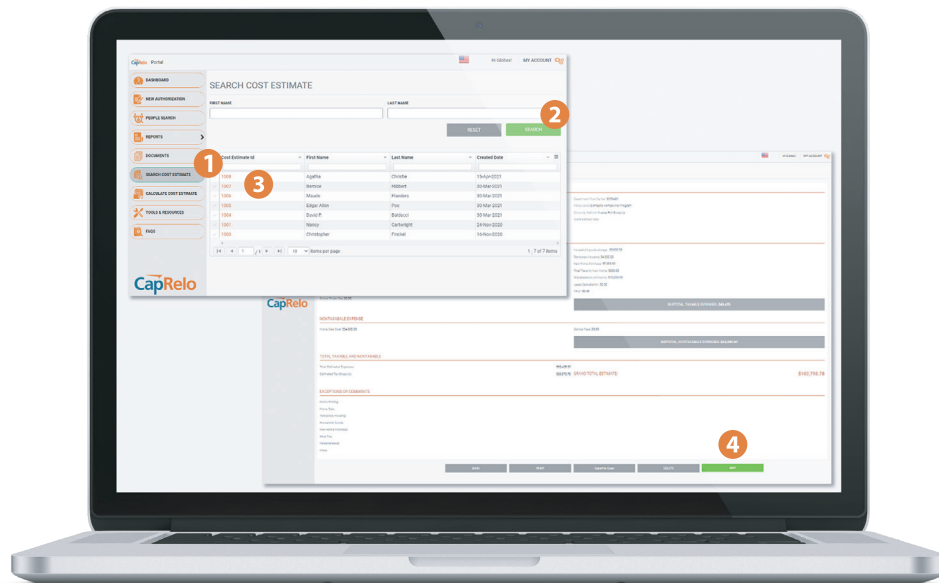
Documents

View and access company or program specific documents (i.e. service agreement, policies, etc.).



Search Cost Estimate

1. Search: Enter the employee's name and click Search (2). Click Reset to refresh all fields to blank
3. Click on Customer ID to link straight to previously saved cost estimate
4. Options to Print, Export to Excel, Delete or Edit



Calculate Cost Estimate

1: Quickly and easily calculate a US Domestic Cost Estimate

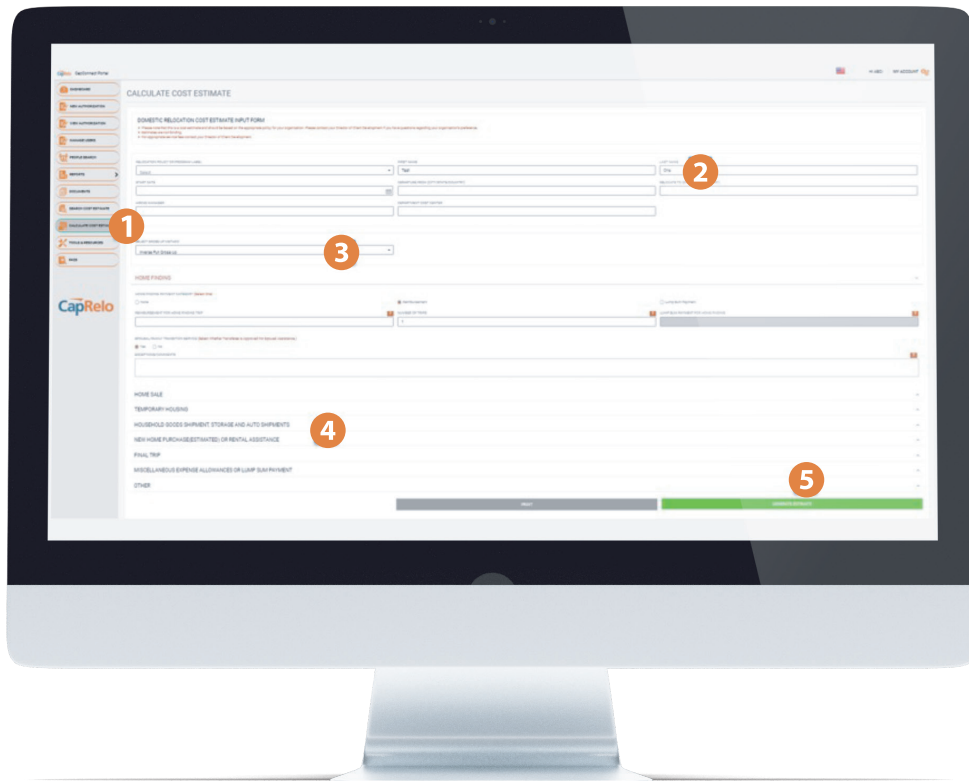
2. Enter employee name: Enter name to enable future search of cost estimates created

3. Select Gross up method: Users can define the gross up method used to calculate gross up on taxable relocation expenses. Federal rates are supplemental

- No Gross Up – this option will not calculate gross up on taxable expenses.
- Flat Rate – this option will calculate gross up on taxable expenses and considers Federal ONLY.
- Inverse Federal ONLY – this option uses an inverse gross up methodology and considers Federal ONLY.
- Inverse Full Gross Up – this option uses an inverse gross up methodology. Federal, OASDI, Medicare are considered as well as a 5% state rate.
- Client Defined Rate – this option allows the user to select a flat tax rate.

4. Enter relevant employee information for benefits available

5. Click on Generate Estimate to create US relocation and US tax costs on proposed relocation package



The screenshot shows the 'Calculate Cost Estimate' form in the CapRelo system. The form is divided into several sections with numbered callouts:

- 1:** Points to the 'Employee Name' field in the 'Employee Information' section.
- 2:** Points to the 'Gross Up Method' dropdown menu in the 'Gross Up Method' section.
- 3:** Points to the 'Generate Estimate' button at the bottom right of the form.
- 4:** Points to the 'Employee Information' section, which includes fields for 'Employee Name', 'Employee ID', 'Employee Type', and 'Employee Status'.
- 5:** Points to the 'Generate Estimate' button at the bottom right of the form.

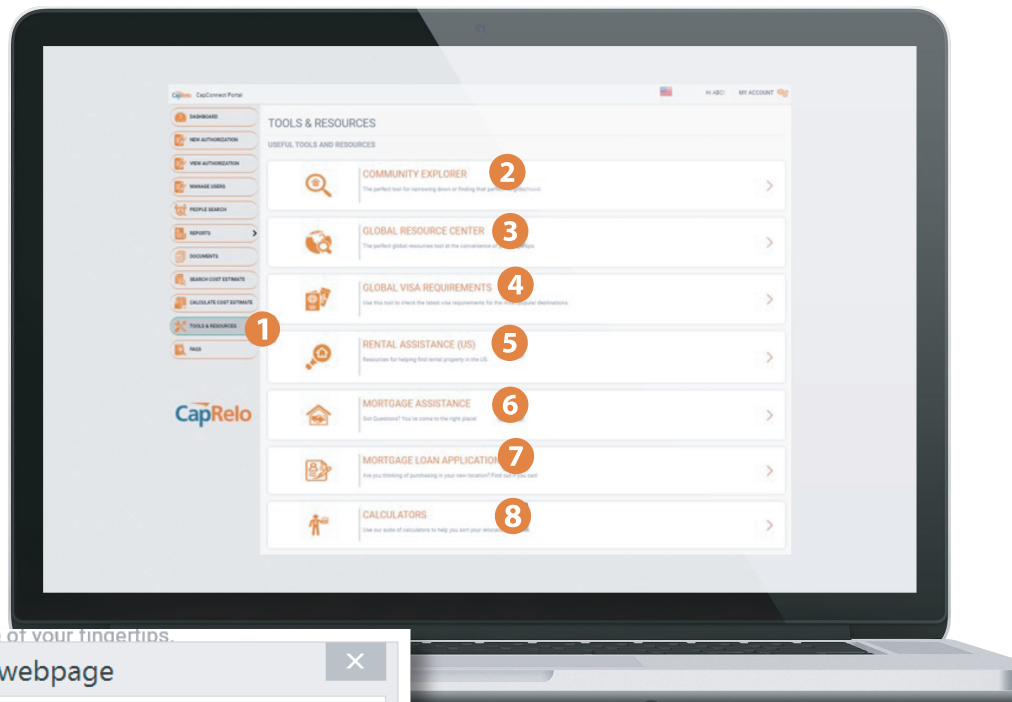
The form also includes sections for 'Home Finding', 'Home Sale', 'Temporary Housing', 'Household Goods Shipment Storage and Auto Shipments', 'New Home Purchase/Estimated or Rental Assistance', 'Final Trip', 'Miscellaneous Expense Allowances or Lump Sum Payment', and 'Other'.



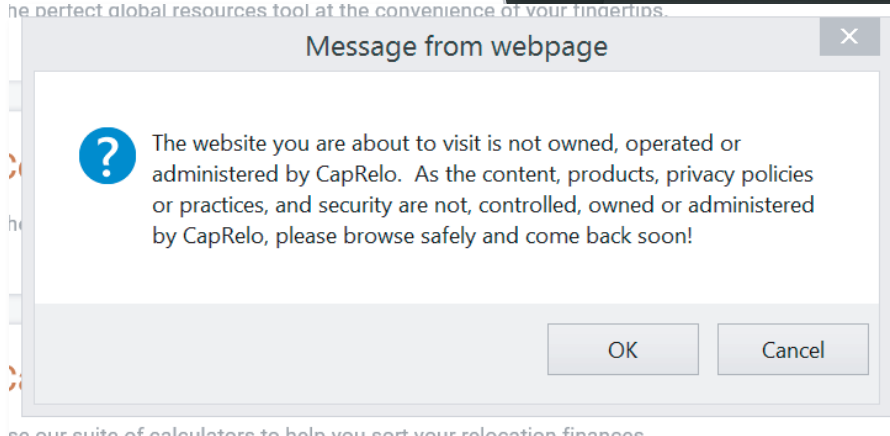
Tools and Resources

1. Access available tools and resources
2. **Community Explorer:** Directs you to Sunray website as a resource for domestic USA area information
3. **Global Resource Center:** Directs you to "Living Abroad's" international relocation center website as a resource for country guides and general information
4. **Global Visa Requirements:** Directs you to CIBT Visas to provide visa information
5. **Rental Assist (US):** Directs you to a lender partner for US rental information
6. **Mortgage Assistance:** Directs you to a lender partner to provide mortgage information
7. **Mortgage Loan Application:** Directs you to a lender partner to provide mortgage loan information
8. **Calculators:** Directs you to a lender partner for home loan, insurance and banking calculators

Disclaimer: Tools and Resource information are provided by external partner websites that are not operated by CapRelo. Users will receive the below popup notification upon exiting the portal.



he perfect global resources tool at the convenience of your fingertips.



se our suite of calculators to help you sort your relocation finances.



Frequently Asked Questions

1. Access Frequently Asked Questions. Click on the FAQs tab for a list of Frequently Asked Questions.
2. To view the answer, click on the arrow to expand.

