

# Companion by CapRelo Portal

CapRelo



*Client User Guide*



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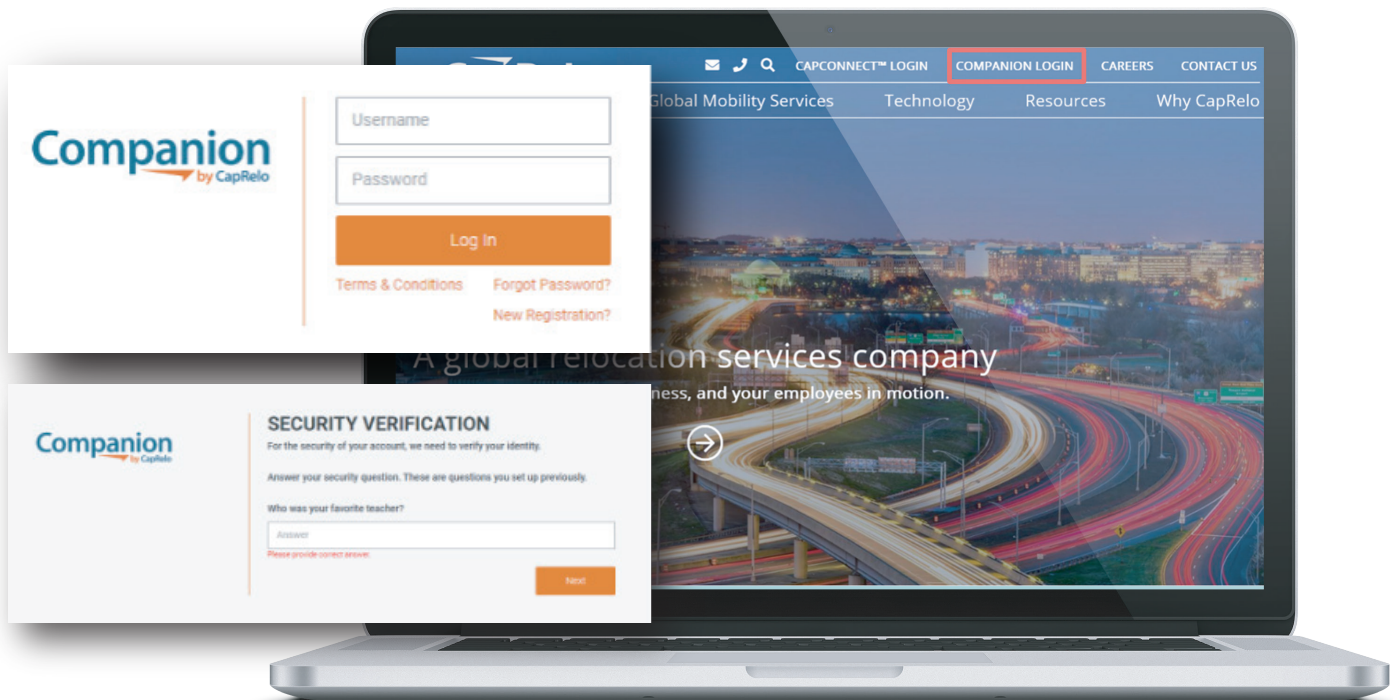


## Client: Login

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 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

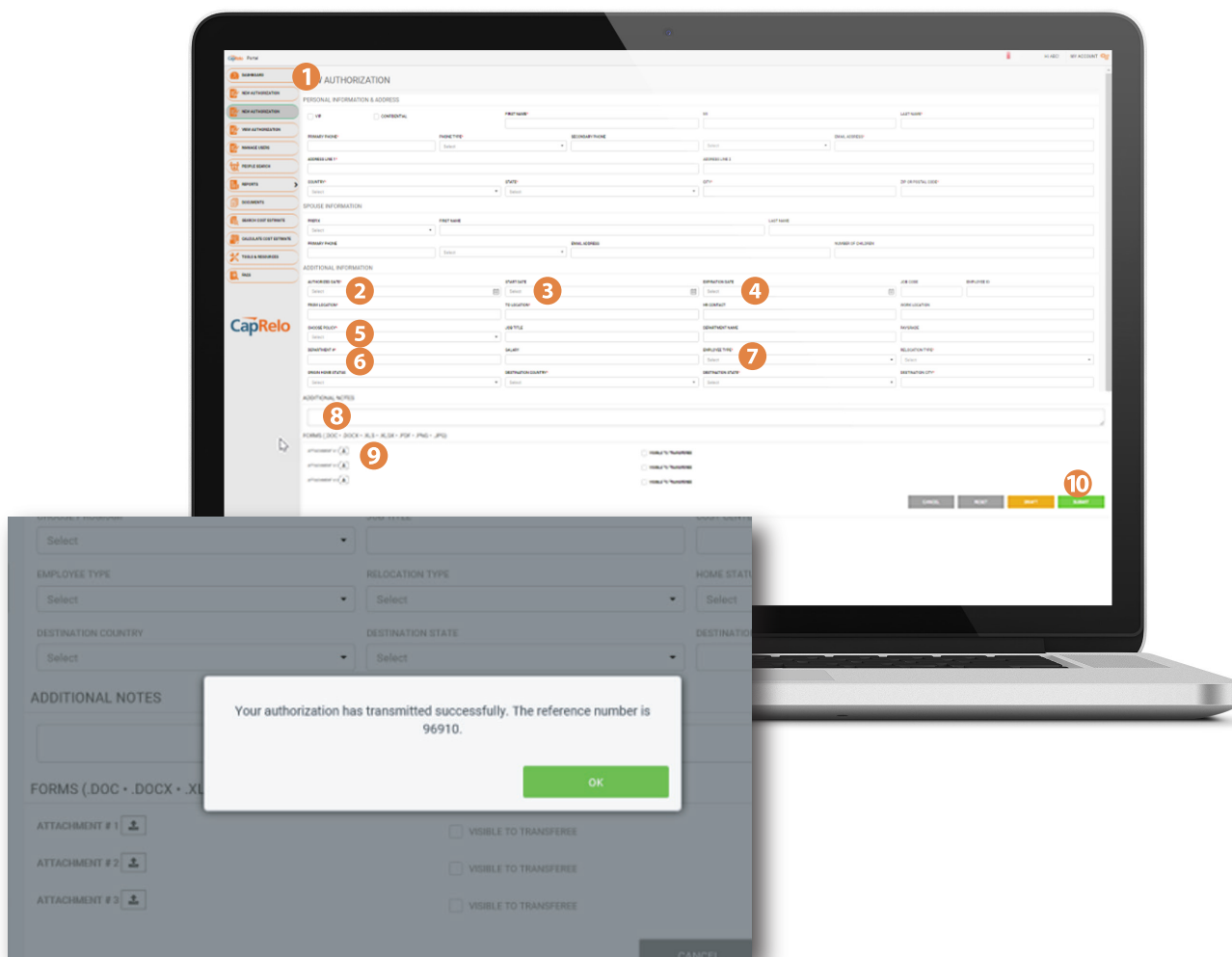
**4. Expiration date:** Date the employee's relocation benefits expire per client's policy (i.e. 6 months, 1 year) or when the assignment is due to end





- 5. **Policy:** Policy and associated benefits authorized for the employee
- 6. **Department:** Department that employee will be working for at destination
- 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. Includes 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.



After clicking submit (10), 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.

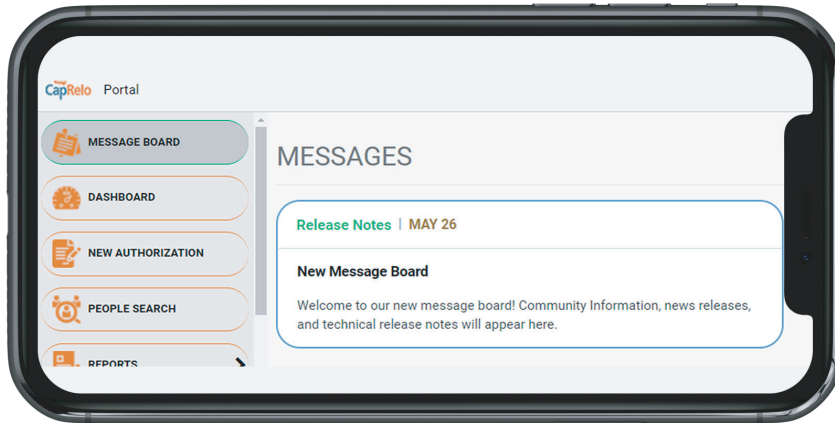
A welcome e-mail is sent to the relocating employee within 24 hours.



# 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

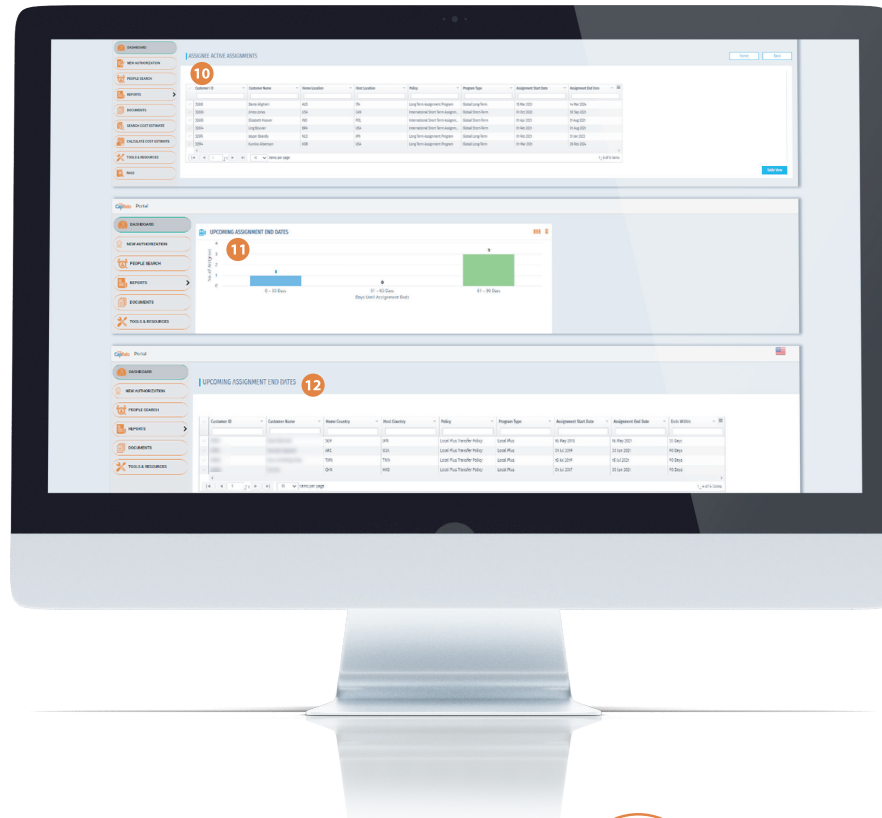
**8. Spend by Policy:** Total Spend per employee in USD

**9. Active Assignments by Host Country:** View active assignment activity based on the host location. This map will only show assignments and not permanent transfers

**10. Active Assignments by Host Country (details):** View details of the employees on active assignments. Click on Customer ID to link straight to assignee record

**11. Upcoming Assignment End Dates:** View active assignments where benefit expiration date is within the next 90 days. Note that this tile relates to assignments and will not include permanent transfers

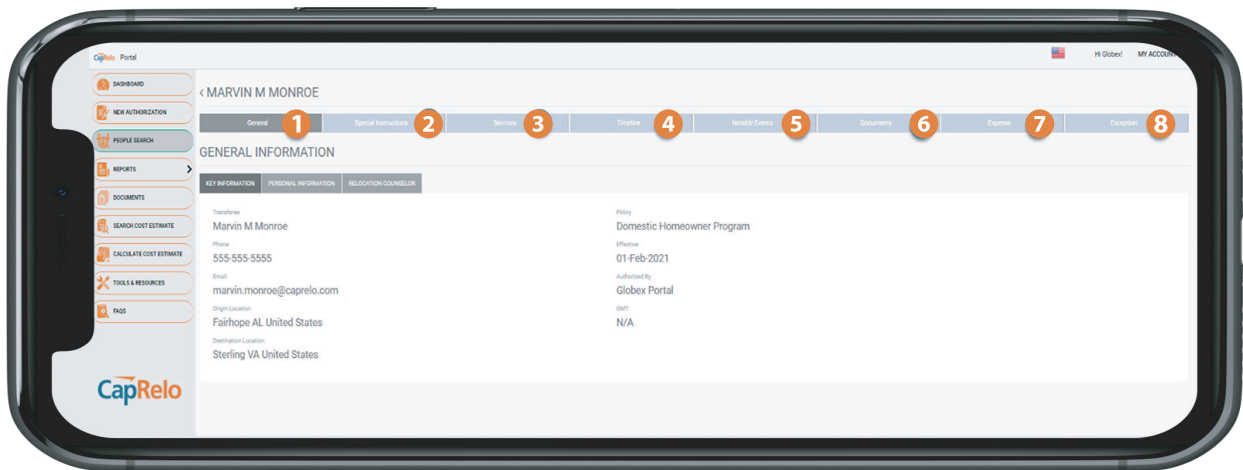
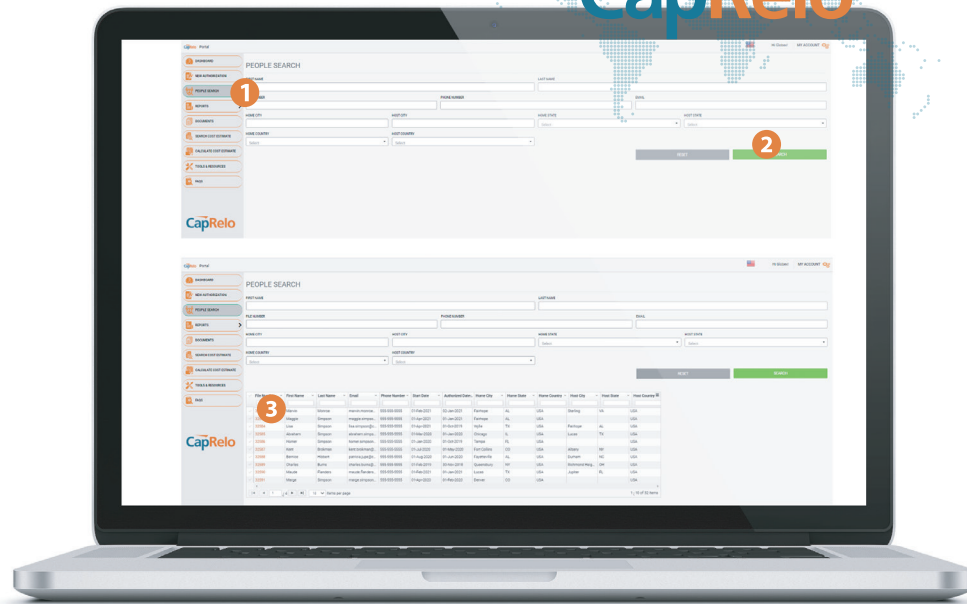
**12. Upcoming Assignment End Dates (details):** View active assignments where benefit expiration date is within the next 90 days. Clicking into the details behind the tile reveals a reportable table of the Active Assignments with a link to the relevant Assignee record



# 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).



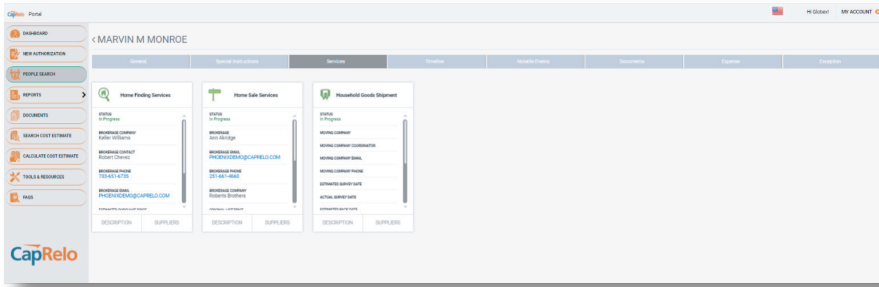
**1. General:** Provides employee's general contact and authorization information

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

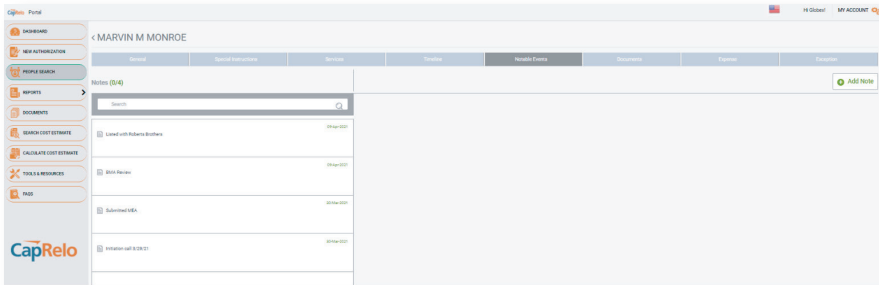
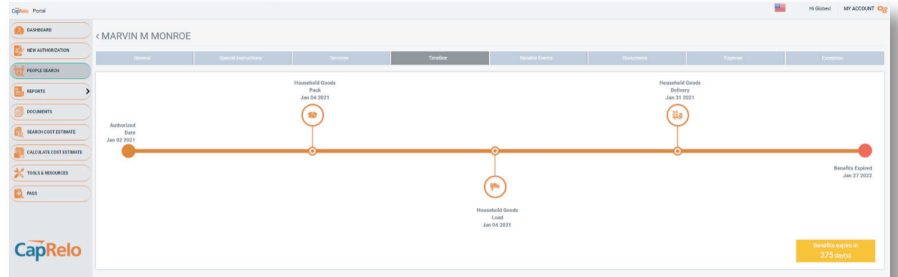
**3. Services:** Shows the services offered to employee in process. Services with Service Cards include:

- Area tour
- Temporary living
- Rental assistance
- Home marketing
- Home sale
- GBO
- Home sale BVO
- Departure services
- Destination settling-in
- School search
- Language training
- Visa and immigration
- Tenancy Management
- Incident Response
- Travel and Coordination
- Home Closing Service
- United States Outbound Certificate of Coverage
- Non United States Certificate of Coverage

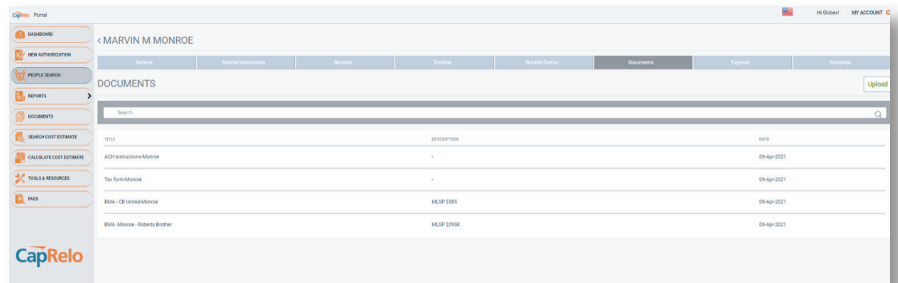




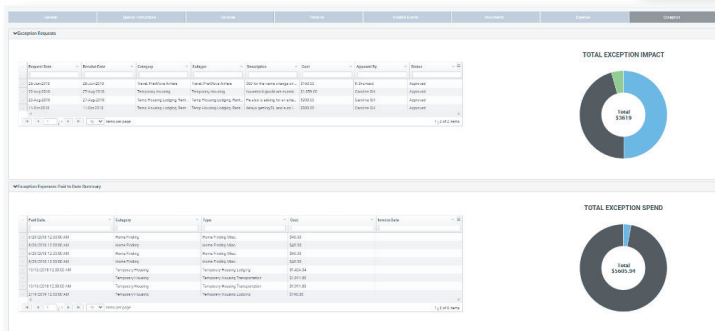
**4. Timeline:** Shows the key services offered to employee in process including visa and immigration applications and estimated Household Goods delivery dates



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

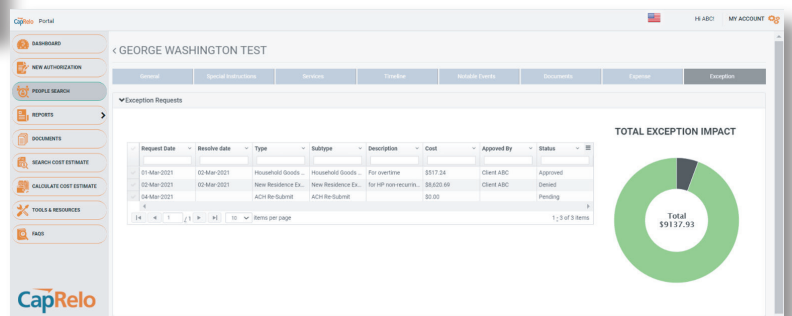


**6. Documents:** Client may upload documents associated to a particular relocation and view documents previously uploaded (i.e. broker market analyses, temporary housing leases, etc.)



**7. Expense:** Expense: Displays total employee submitted reimbursement expenses on the file 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

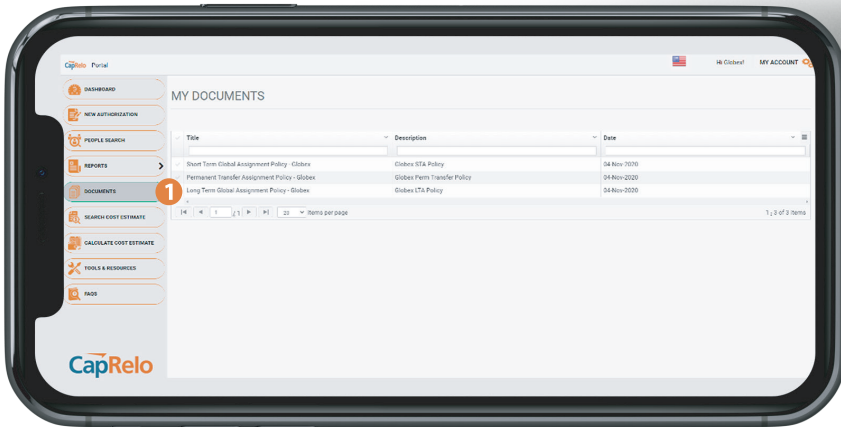
Includes core reports available on demand under the Reports tab (1). All data is real time. Enter report criteria (2) and click Submit (3).

Export the data into Excel by clicking on menu icon 



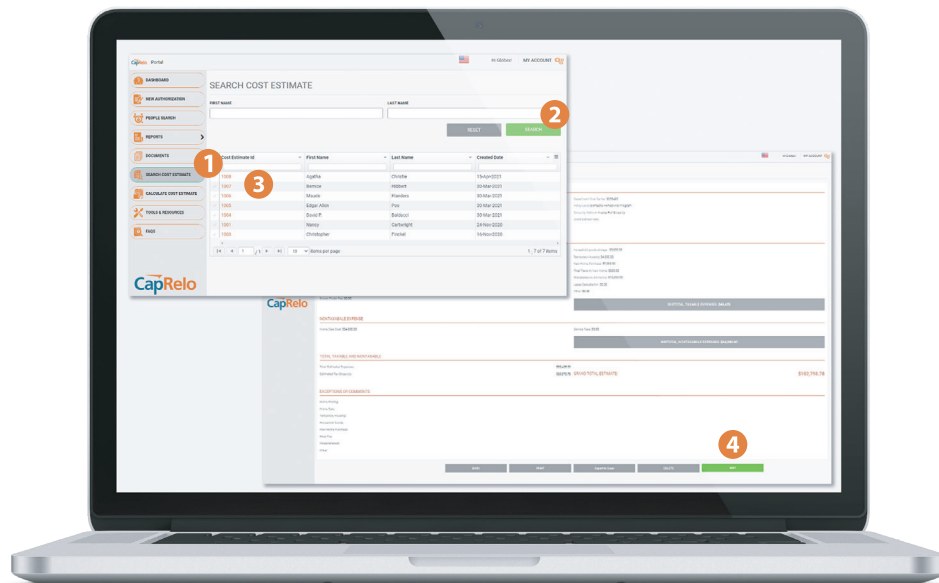
# Documents

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

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

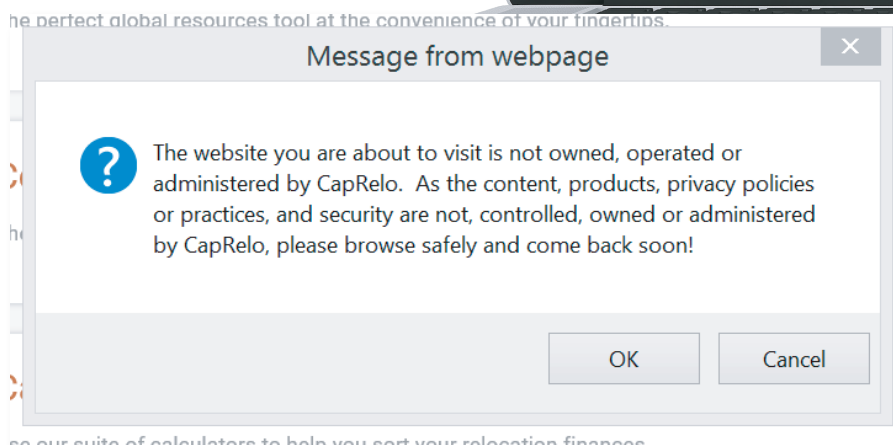
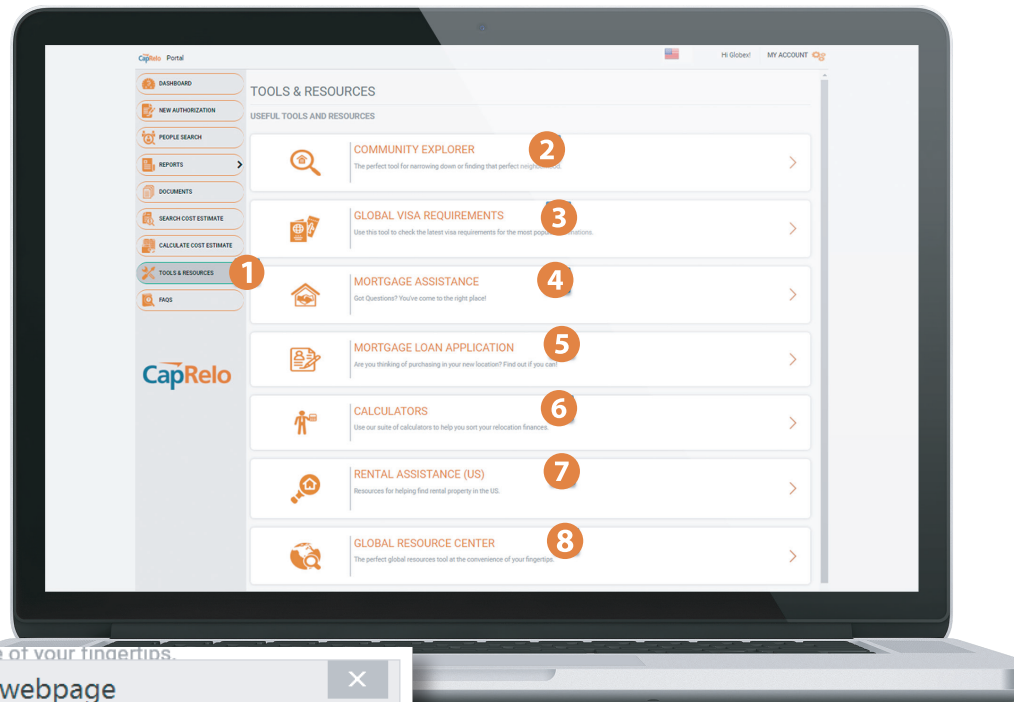


# Tools and Resources

1. Access available tools and resources
2. **Community Explorer:** Directs you to Sunray website as a resource for domestic USA area information
3. **Global 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

**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.



Use 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.

