

The Infinisource Online Portal provides you with a suite of reports to assist you with complying with Fringe Benefits (i.e. Flexible Spending Accounts (FSA), Health Reimbursement Arrangements (HRA), etc.) This guide is designed to help you with pulling reports within the Infinisource Online Portal.

If you have a question about any reports and the data that will pull on the report, please review our [Fringe Benefits Reports Guide](#), available on the [FSA Resource Center](#).

Reports

Click on the “Reports” tab to view any reports you have processed in the past or to pull any reports now.

HOME **REPORTS** REQUESTS EMPLOYEES ▼ PLANS RESOURCES IMPORTS ▼ LINKS ▼

Last Login Date: 8/19/2015 10:45:21 AM CDT
Last Login Source: Employer Portal

Reports

[Account Balance Detail Report](#) (300 Reports | Last Created: 8/14/2015) [Run New Report](#)
View plan balance summaries and consumer account balance detail as of specified date.

[Account Balance Excel Report](#) (65 Reports | Last Created: 8/1/2015) [Run New Report](#)
View plan account balance information per participant and per plan as of specified date in an excel format.

[Claim History by Divisions Report](#) (1 Reports | Last Created: 5/2/2014) [Run New Report](#)
View all claims submitted during a specified time period including claim status by division.

HOME **REPORTS** REQUESTS EMPLOYEES ▼ PLANS RESOURCES IMP

Last Login Date: 8/19/2015 10:45:21 AM CDT
Last Login Source: Employer Portal

Reports

[Account Bala](#)
View plan balar

To view prior reports, click on the name of the report in the list.

Reports: Account Balance Detail Report

[Run New Report](#)

Report Dates	Date/Time Created	Created By	Action
Weekly Year to Date Report (8/13/2015) Detail Report EXCEL	8/14/2015 2:17:00 AM	Auto Generated	
Weekly Year to Date Report (8/13/2015) Detail Report EXCEL	8/14/2015 2:16:59 AM	Auto Generated	
Weekly Year to Date Report (8/6/2015) Detail Report EXCEL	8/7/2015 2:16:46 AM	Auto Generated	

To process a new report now, click on “Run New Report”

Reports: Account Balance Detail Report			Run New Report
Report Dates	Date/Time Created	Created By	Action
Weekly Year to Date Report (8/13/2015) Detail Report EXCEL	8/14/2015 2:17:00 AM	Auto Generated	
Weekly Year to Date Report (8/13/2015) Detail Report EXCEL	8/14/2015 2:16:59 AM	Auto Generated	
Weekly Year to Date Report (8/6/2015) Detail Report EXCEL	8/7/2015 2:16:46 AM	Auto Generated	

You will be asked to fill out the information for the report that you want data.

Request Account Balance Detail Report

*As Of:	<input type="text" value="8/19/2015"/> <input type="button" value="Calendar"/>	Format date as m/d/yyyy.
*Plan Year:	<input type="text" value="..."/>	
*Group By:	<input type="text" value="Do not Group"/>	
*Report Detail Level:	<input type="text" value="Select a level..."/>	
	<input type="checkbox"/> Include Cash Balance Detail	
*Plan:	<input type="checkbox"/> Email me when the report is available	

*** Required Field** [View Reports](#) | [Cancel](#)

***Note:** You can mark to receive an email notification when the report is available. This will allow you to continue with your tasks and retrieve the report when it has completed the processing stages.

Request Account Balance Detail Report

*As Of:	<input type="text" value="8/19/2015"/>
Format date as m/d/yyyy.	
*Plan Year:	<input type="text" value="2015"/> ▾
*Group By:	<input type="text" value="Do not Group"/> ▾
*Report Detail Level:	<input type="text" value="Detail"/> ▾
	<input checked="" type="checkbox"/> Include Cash Balance Detail
*Plan:	<input type="radio"/> All <input type="radio"/> FSA Dependent Care <input checked="" type="radio"/> FSA Healthcare <input type="radio"/> Health Reimbursement <input type="radio"/> Parking
	<input checked="" type="checkbox"/> Email me when the report is available

* Required Field [View Reports](#) | [Cancel](#)

[View Reports](#) | [Cancel](#)

When all required data fields are completed, click on "Request".

You will receive a confirmation of the request for the report being received successfully.

Report Successfully Requested

The report has been successfully requested. It will be generated in the order it has been requested and made available for viewing under Reports page.