

This one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs). This includes entering enrollments online.

How do I get access to this portal?

1. You and your assigned contacts will be sent a user name and a temporary password.
2. Upon first login, you will be prompted to change the password.
3. Once the password is updated and confirmed, click **Login**.

Welcome

Login to your account

Username:

Password:

Can't login?
[I forgot my password](#)

Online Enrollment – New Participant

1. Select the employees tab.
2. Click **Add Employee**.
3. Fill in required fields under personal information.

EMPLOYEES ▾ PLANS RESOURCES IMPORTS ▾ LINKS ▾

[View All Employees](#) | [Add Employee](#)

Search Employees

Last Name:

First Name:

Employee Number:

Employee Status:

Recently Viewed Employees

[Doe, Joe \(0000241221\)](#)

[Chemical, Sample \(0000973414\)](#)

[Doe, John \(0000129582\)](#)

Last Login Source: Employer Portal

Add Employee Profile

Personal Information

* First Name:

Middle Initial:

* Last Name:

* Birth Date:
Format date as mm/dd/yyyy.

* SSN: - -

4. Fill in required fields under employment information.
 - a. Hire date = date employee was hired
 - b. Payroll frequency = how often is payroll processed for the employee
 - c. Payroll frequency effective date = same as the hire date
 - d. Set up division, class, class effective date and hours worked per week

5. Click **Add Employee**.

* Required Field **Add Employee** | [Cancel](#)

6. You will see the confirmation of employee being added.

7. Within that confirmation box, click **Add Enrollment**.

Test Employee: Profile
Employee Status: Active (3/6/2017)
Employee Number: 0002895902
Division: Unassigned

Employee Profile Added
There are no enrollments yet for the employee. Click on the 'Add New Enrollment' button to immediately add enrollment(s) now.

Add New Enrollment

8. Select plan year to enroll the participant from the drop-down menu

9. Select plan(s) to enroll the participant

10. Select the payment method from the drop-down menu

11. Enter effective date and annual election amount.

- a. For HRA plans, the amount is pre-loaded
- b. For transit – enter amount per month

12. Click **Submit** to complete enrollment.

Add New Enrollment

Plan Year and Plan

Which plan year would you like to enroll the participant in? PY 2017

Select the plans you would like to enroll the participant in?

- FSA Health Care
- FSA Dependent Care
- Health Reimbursement
- Parking
- Transit

Payment Method: Check

Adding an Employee

13. If the employee can be enrolled in another plan year, you will see a dialog box asking if you want to enroll the participant in another plan year.
- If yes is selected, the **Add New Enrollment** page follows
 - If no is selected, the **Enrollment** page confirmation message “You have successfully added enrollment(s)” follows.

Add New Enrollment

Would you like to enroll this participant in another plan year?

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2016 - 2017 FSA

Effective Date:

Annual Election: \$

Allow Health Plan(s) to Send Healthcare Claims: Yes No

2016 - 2017 DFSA

Effective Date:

Annual Election: \$

2016 - 2017 HRA

Effective Date:

Contribution Level:

Annual Employer Contribution: \$

Eligible Dependents: Effective Date:

2016 - 2017 Transit - Already Enrolled

Effective Date:

Monthly Election:

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14. You will receive a confirmation statement that the enrollment was successfully processed.
15. An automatic email will be provided to the participant with a guide to the online portal.

Jane Smith: Add Enrollment

You've successfully enrolled the employee in the following plans:
- PY 2015-FSA Healthcare

Status: Active (12/1/2014)
Division: Sample 1

PY 2015