

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**.

## Online Enrollments – New Plan Year (Re-Enroll)

1. Select the Employee Tab
2. Search for employee to enroll
3. Click on “Enrollments” link
4. Click on “Add New Enrollment”

5. Select the the plan year from the drop-down menu
6. Select the enrollment plan(s)
7. Select the payment method from the drop-down menu
8. Click on “Submit”
9. Add the require plan information
10. Click on “Submit”

11. 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.
  - a. If yes, the "Add New Enrollment" page follows
  - b. If no, 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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12. You will then see a confirmation statement that the enrollment was successfully processed

### 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

**2016 - 2017 FSA**

Effective Date:

Annual Election: \$ 0.00

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

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**2016 - 2017 DFSA**

Effective Date:

Annual Election: \$ 0.00

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**2016 - 2017 HRA**

Effective Date:

Contribution Level: Individual (\$1,200.00)

Annual Employer Contribution: \$ 1200.00

Eligible Dependents: No dependents exist

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**2016 - 2017 Transit - Already Enrolled**

Effective Date: 8/1/2016

Monthly Election: \$1,100.00

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## Online Enrollments – New Participant

1. Select the Employee Tab
2. Click on "Add Employee"
3. Fill in required fields

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:  -  -

Julie Hanshaw

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 \(0000129582\)](#)

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


# Employer Online Enrollment


- c. Payroll frequency effective date = same as the hire date
- d. Set up division, class, class effective date and hours worked per week

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

- 5. Click **Add Employee**.
- 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** 

**Add New Enrollment**

**Plan Year and Plan**

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

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

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

Payment Method:

- 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.
- 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.
  - c. If yes is selected, the **Add New Enrollment** page follows
  - d. If no is selected, the **Enrollment** page confirmation message “You have successfully added enrollment(s)” follows.

**2016 - 2017 FSA**

Effective Date:

Annual Election: \$

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

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**2016 - 2017 DFSA**

Effective Date:

Annual Election: \$

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**2016 - 2017 HRA**

Effective Date:

Contribution Level:

Annual Employer Contribution: \$


Eligible Dependents: No dependents exist

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**2016 - 2017 Transit - Already Enrolled**

Effective Date: 8/1/2016

Monthly Election: \$1,100.00

 **Submit** | [Cancel](#)

**Add New Enrollment**

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

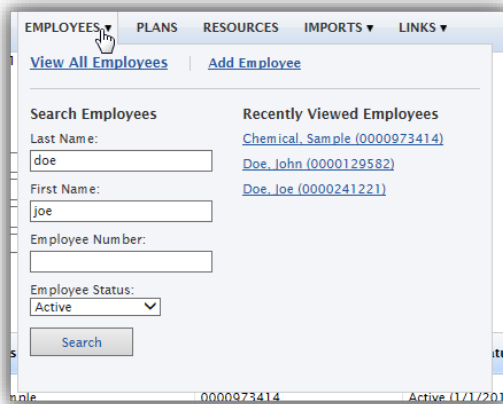
|

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.



## Online Enrollments – Remove Enrollment

1. Select the Employee Tab
2. Search for employee to remove
3. Click on “Enrollments” tab
4. Find the Account
5. Click on “Remove” within the “Actions” column



Profile Dependents Account Summary **Enrollments** Contributions Claims Payments Status Debit Card

**Active Accounts**  
1/1/2019 - 12/31/2019  
Payment Method: Direct Deposit

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
<a href="#">FSA Dependent Care - Active</a>	1/1/2019	\$1,300.00	\$0.00 of \$0.00	\$1,050.00 of \$1,300.00	\$50.00 Bi-Weekly	<a href="#">Update</a> <a href="#">Remove</a>
<a href="#">Transit - Active</a>	1/1/2019	\$200.00/ Month	\$0.00/ Month	\$1,938.51 of \$2,400.00	\$92.31 Bi-Weekly	<a href="#">Update</a> <a href="#">Remove</a>
<a href="#">Parking - Active</a>	1/1/2019	\$200.00/ Month	\$0.00/ Month	\$1,938.51 of \$2,400.00	\$92.31 Bi-Weekly	<a href="#">Update</a> <a href="#">Remove</a>
<a href="#">Health Reimbursement - Active</a>	1/1/2019	--	\$5,000.00 of \$5,000.00	\$0.00 of \$0.00	--	<a href="#">Update</a> <a href="#">Remove</a>
<a href="#">Health Care Account - Active</a>	1/1/2019	\$1,200.00	\$0.00 of \$0.00	\$969.15 of \$1,200.00	\$46.15 Bi-Weekly	<a href="#">Update</a> <a href="#">Remove</a>

6. You will be prompted to “Continue” to confirm your Removal

