Employer Quick Start Guide

Welcome to the Infinisource Employer Portal. 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).

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Overview

The Employer Portal is convenient and easy to use with anytime access which allows you to:

- View current and prior year plan information
- Access forms and documents
- Retrieve reports
- Load data files
- Submit service requests
- Enter enrollment/eligibility information
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Access history of reports and notifications
- Add, update and enroll employees
- Add and manage recurring contributions

Plus, user access levels are role-based. Each role determines access rights not only to administrative pages and operations, but also to underlying data in applicable reports.

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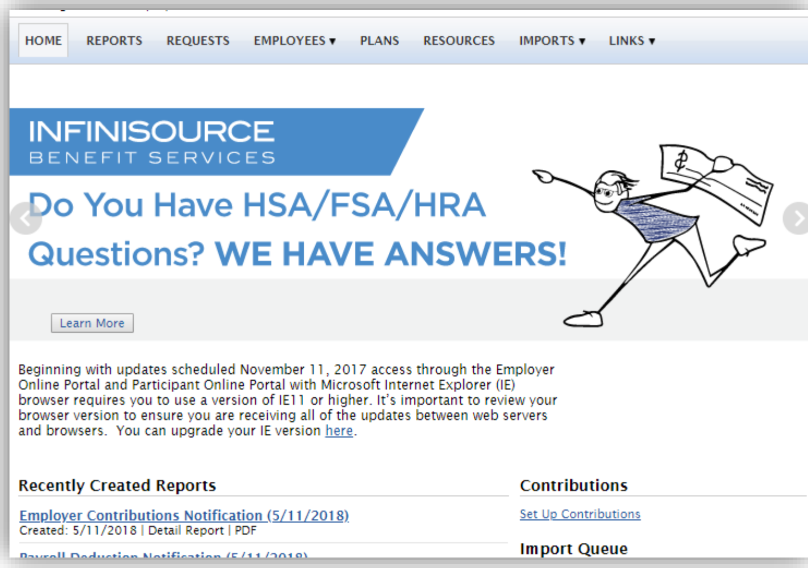
How do I get access to this portal?

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.**

The **Home Page** is easy to navigate.

Once you're logged in, everything you need to efficiently and effectively manage your accounts is found on the home page. You will see a history of the reports and notifications with quick links to the latest versions. From the home page, you can:

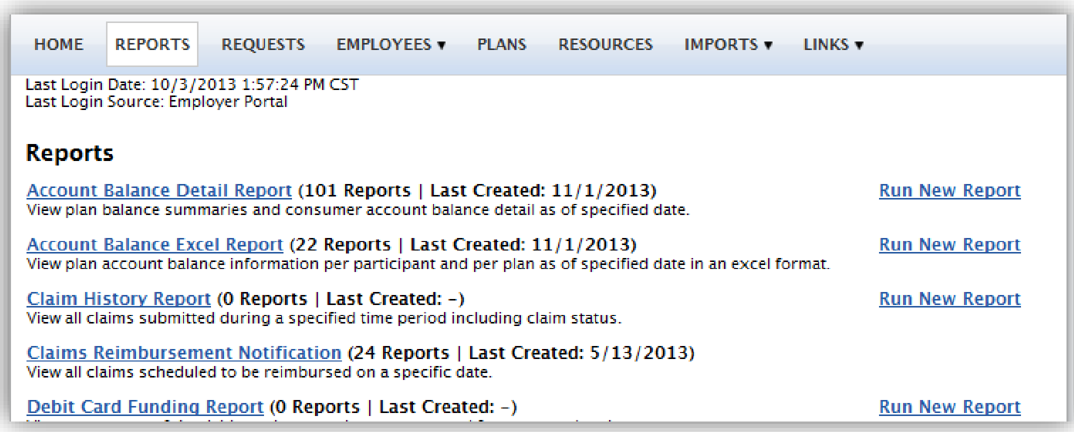


- View employee level data
- View reports
- Check on status of file imports
- Log requests
- Read plan documents
- Download forms
- Vie the employer dashboard

You can also access the tabs at the top of the page or links at the bottom of the page for easy navigation.

How do I view reports and notifications?

1. On the **Home Page**, under the **Reports** tab is a list of all available reports.
2. Simply select the report desired and it will be displayed.
3. If there is a report that you need, but do not see, click **Run New Report**. Enter required information and click **Request**.



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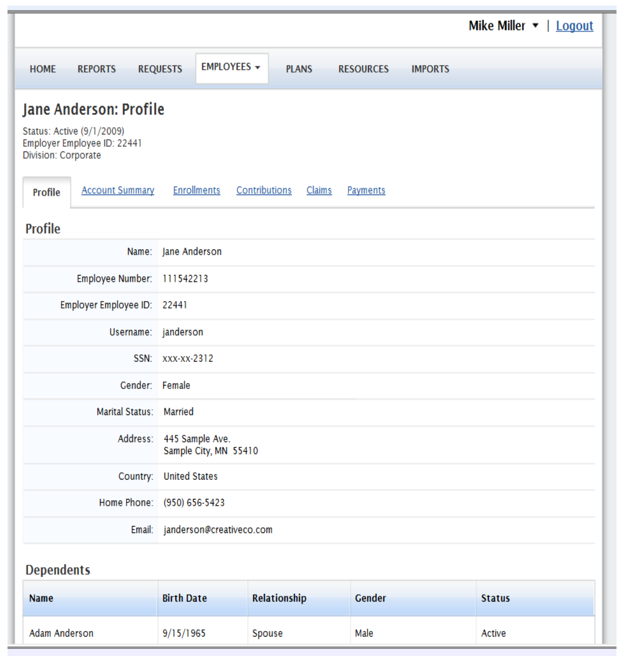
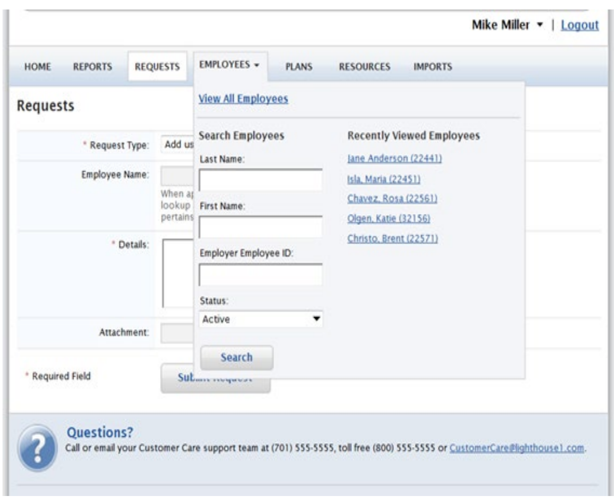
How do I get access for a new HR rep or add new employees?

1. Click on **Requests** tab or the link at the bottom of the page.
2. Under **Request Type**, there is a drop down menu with over 10 options.
3. Choose the request type (i.e., add a new employee, add employer contact or change payroll deductions), then select a consumer from a list of employees, enter the request details and/or attach a document or file.
4. Click **Submit Requests.**
5. All requests are securely delivered.

What kind of employee-level data can I access?

1. Under the **Employees** tab, you can get real-time data on all enrolled employees.
2. You can search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access the following information:
    a. Account summary
    b. Demographics
    c. Account balances
    d. Enrollments
    e. Contributions
    f. Claims
    g. Payments
    h. Status





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How do I get access for a new HR Rep or add new employees?

1. Click on Requests on the tab at the top or from the link at the bottom of the page.
2. Under Request Type, there is a drop down menu with over 10 options to choose from.
3. Choose the request type, i.e. add a new employee, add employer contact or change payroll deductions, then select a consumer from a list of employees, enter the request details and/or attach a document or file.
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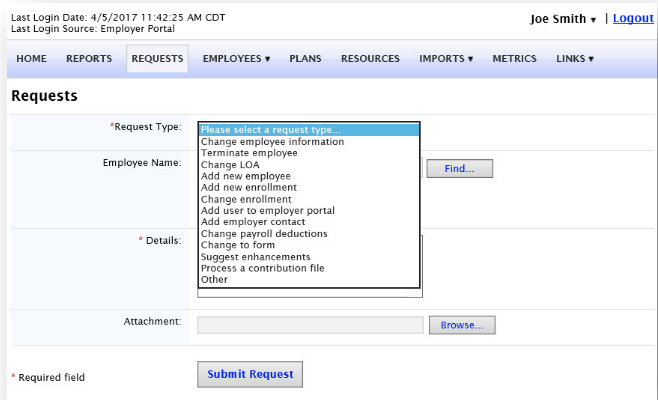
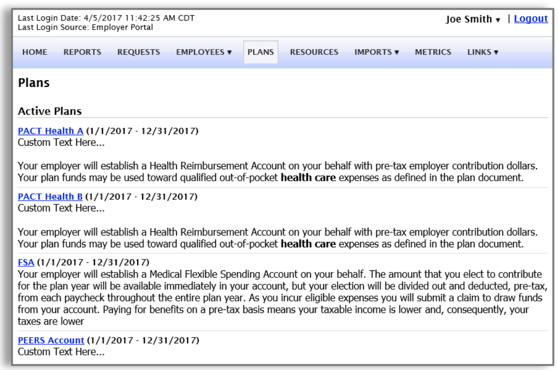


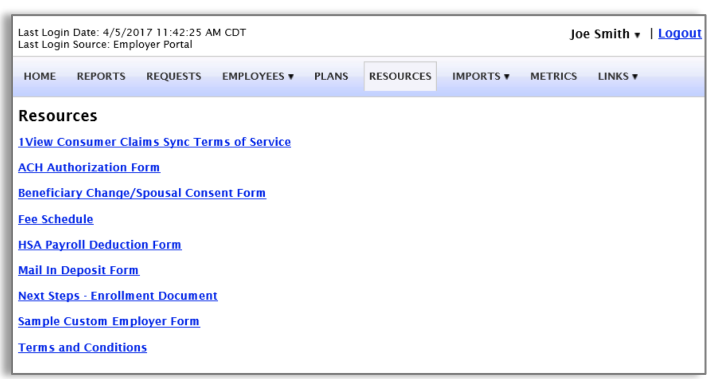
Will I be able to access plan information?

1. Under the **Plans** tab, you will find options to view the same information as the employees for all active and inactive plans.
2. Information available:
   - Plan summaries
   - Plan details and rules
   - Documents



Where would I access required forms?

1. Click the **Resources** tab.
2. In this section you can download and print any forms needed.
3. You will also have access to any other documents or custom materials related to your plans in this tab.



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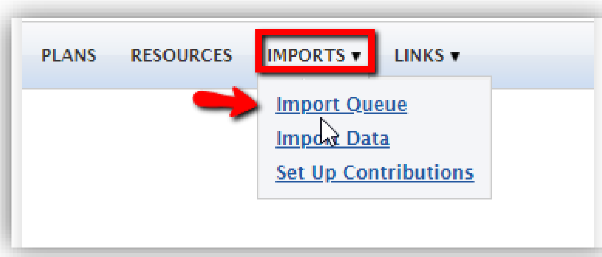
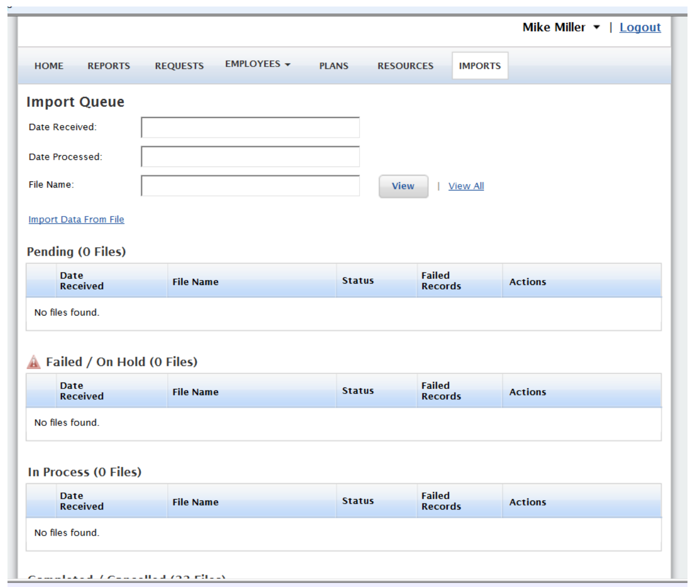
How do I import data?



1. Under the **Imports** tab you can import demographic, enrollment and contribution files directly into the portal using standard CSV formatted files.
2. Once in the Imports home page, you would select the type of data to be imported.
3. Open the template in Excel.
4. Enter or paste your data into the template.
5. Check for field matches by viewing setup data.
6. Save as CSV to a location you can remember.
7. Upload file.



Will I be able to add/enroll/update Employees?

1. Under the **Employees** Tab.
2. Select **Add Employee**.
3. Enter the Personal and Employment Information.
4. Click Add Employee.
5. In the Confirmation section click Add Enrollment.
6. Select the plan and click Enroll.
7. Enter the Effective Date and Election/Employer Contribution.
8. Click **Add Enrollment(s)**.

Will I be able to update an employee status?

1. Under the **Status** tab.
2. In the Actions section and click Add New Status.
3. Select the Status from the drop-down menu.
4. Enter the Status Effective as of date.
5. Click Add Status.

Will I be able to view employer metrics?

1. Under the Dashboard tab you can access your employer metrics and Smartview information.
2. Information available here includes:
   - Consumer Engagement Metrics
   - Utilization Metrics
   - Financial Metrics