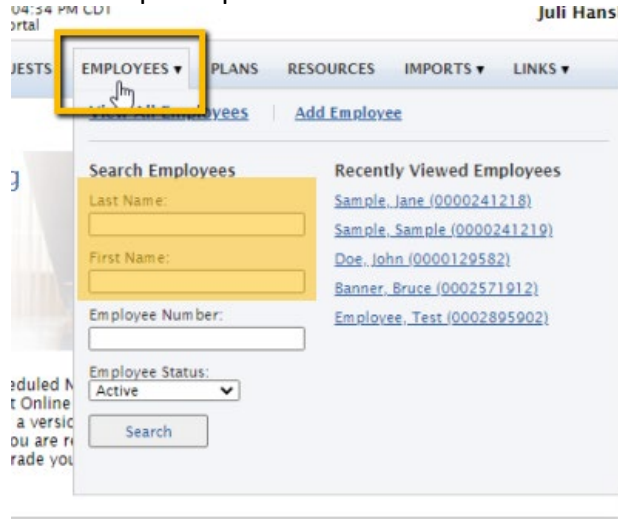


The Infinisource Online Portal provides you with the ability to review participant data including profile information, account summary, enrollments, account balance, claims and payments. This guide is designed to help you with finding this data within the Online Portal.

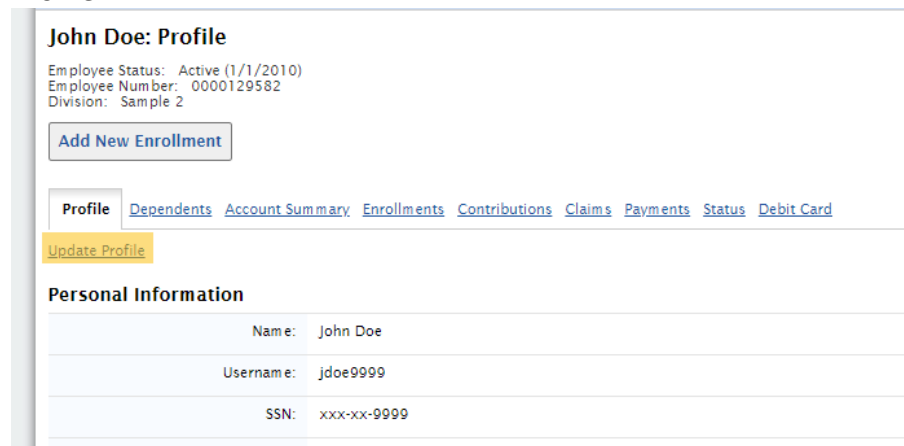
Account Balance

Once you have logged into the Online Portal, select “Employees” under the top menu to find the participant in which you are looking to confirm their Account Balance.

Enter the participant name and click on “Search”



Profile: You will begin on the Profile tab where you view the personal information (including address) and employment information. You can make changes here by selecting “Update Profile”.



Dependents: The next tab is for Dependents. If you need to add or update anything within this tab, click on either “Add Dependent” or “Update Dependent”.

Account Summary: Here is where you can view the Eligible amount, Submitted claims, Plan Year Balance, Available Balance and Cash Balance for any plan the participant has elected – current and prior year.

Account	Eligible Amount	Submitted Claims	Plan Year Balance	Available Balance	Cash Balance
Health Care Account 1/1/2020 - 12/31/2020	\$500.00	\$0.00	\$500.00	\$500.00	\$500.00

Account	Eligible Amount	Submitted Claims	Plan Year Balance	Available Balance	Cash Balance
Health Care Account 1/1/2019 - 12/31/2019	\$1,200.00	\$0.00	\$1,200.00	\$1,200.00	\$1,200.00
FSA Dependent Care 1/1/2019 - 12/31/2019	\$1,300.00	\$0.00	\$1,300.00	\$1,300.00	\$1,300.00
Health Reimbursement 1/1/2019 - 12/31/2019	\$5,000.00	\$50.00	\$5,000.00	\$5,000.00	\$5,000.00

You can click on the Account to view Plan Rules. If you click on the Submitted Claims balance, it will take you directly to the “Claims” tab where you can view detailed information on the claim.

Date of Service	Claim Amount and Details	Account	Claim Status
1/20/2018	\$100.00 filed on 11/3/2018 Pending: \$70.00 Paid: \$0.00 Denied: \$30.00 Filed via Claims link Receipt: New Needed	Health Care Account 1/1/2018 - 12/31/2018	Hold
5/18/2018	\$10.00 filed on 5/18/2018 Pending: \$0.00 Paid: \$0.00 Denied: \$10.00 Filed via Participant portal Receipt: Received	Health Care Account 1/1/2018 - 12/31/2018	Denied

Enrollments: Provides you with details on that participants enrollments active and previous.

[Profile](#) [Dependents](#) [Account Summary](#) **Enrollments** [Contributions](#) [Claims](#) [Payments](#) [Status](#) [Debit Card](#)

Active Accounts

1/1/2020 - 12/31/2020
Payment Method: Direct Deposit

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
Health Care Account - Active	1/1/2020	\$0.00	\$0.00 of \$0.00	\$0.00 of \$0.00	\$0.00 Bi-Weekly	Update Remove

Previous Accounts

1/1/2019 - 12/31/2019
Payment Method: Direct Deposit

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction
FSA Dependent Care	1/1/2019	\$1,300.00	\$0.00 of \$0.00	<u>\$1,300.00</u> of \$1,300.00	\$50.00 Bi-Weekly
Transit	1/1/2019	\$200.00/ Month	\$0.00/ Month	<u>\$2,400.00</u> of \$2,400.00	\$92.31 Bi-Weekly
Parking	1/1/2019	\$200.00/ Month	\$0.00/ Month	<u>\$2,400.00</u> of \$2,400.00	\$92.31 Bi-Weekly
Health Reimbursement	1/1/2019	--	<u>\$5,000.00</u> of \$5,000.00	\$0.00 of \$0.00	--

Contributions: This section provides you with the details on contributions made by the participant.

[Profile](#) [Dependents](#) [Account Summary](#) [Enrollments](#) **Contributions** [Claims](#) [Payments](#) [Status](#) [Debit Card](#)

Account type:
Non-HSA

Account: Contribution Type: Status: [Search](#) | [Reset](#)

Contributions [Export](#)

Date	Contribution Type	Account	Status	Amount
12/27/2019	Payroll Deduction	Transit 01/01/2019 - 12/31/2019	Posted	\$92.25
12/27/2019	Payroll Deduction	Parking 01/01/2019 - 12/31/2019	Posted	\$92.25
12/27/2019	Payroll Deduction	FSA Dependent Care 01/01/2019 - 12/31/2019	Posted	\$50.00
12/27/2019	Payroll Deduction	Health Care Account 01/01/2019 - 12/31/2019	Posted	\$46.25

Claims: This section will provide any claim details for the account selected. You can also filter this by date submitted and method of submitting the claim.

[Profile](#) [Dependents](#) [Account Summary](#) [Enrollments](#) [Contributions](#) **Claims** [Payments](#) [Status](#) [Debit Card](#)

Account:

Submit Date Within:

Method Filed: [View](#) | [View All](#)

[Profile](#) [Dependents](#) [Account Summary](#) [Enrollments](#) [Contributions](#) **Claims** [Payments](#) [Status](#)

Account: Health Care Account (1/1/2018 - 12/31/20)
 Submit Date Within: All
 Method Filed: All

View | [View All](#)

Claims

Date of Service	Claim Amount	Account
1/20/2018	\$100.00 file	Health Care Account 1/1/2018 - 12/31/2018
5/18/2018	\$10.00 file	Health Care Account 1/1/2018 - 12/31/2018

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Account: Health Care Account (1/1/2018 - 12/31/20)
 Submit Date Within: Last 30 days
 Method Filed: All

View | [View All](#)

Claims

Date of Service	Claim Amount	Account
1/20/2018	\$100.00 file Pending: \$70.00 Filed via Claims link	Health Care Account 1/1/2018 - 12/31/2018
5/18/2018	\$10.00 file Pending: \$0.00 Paid: \$0.00 Denied: \$10.00 Filed via Participant portal Receipt: Received	Health Care Account 1/1/2018 - 12/31/2018

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Account: Health Care Account (1/1/2018 - 12/31/20)
 Submit Date Within: All
 Method Filed: All

View | [View All](#)

Claims

Date of Service	Claim Amount and Details	Account	Claim Status
1/20/2018	\$100.00 filed on 11/3/2018 Pending: \$70.00 Paid: \$0.00 Denied: \$30.00 Filed via Claims link Receipt: New Needed	Health Care Account 1/1/2018 - 12/31/2018	Hold
5/18/2018	\$10.00 filed on 5/18/2018 Pending: \$0.00 Paid: \$0.00 Denied: \$10.00 Filed via Participant portal Receipt: Received	Health Care Account 1/1/2018 - 12/31/2018	Denied

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Payments: The next tab is the Payments tab. You can view any payments that have been made to the participant here.

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Payments

Date	Payment Number	Method	Status	Amount
12/11/2018	0000001010	Check	Reissue of Check 0000002085	\$42.00
6/7/2018	0000003872	Check	Reissue of Check 0000003662	\$75.00
1/16/2018	0000003662	Check	Reissue of Check 0000003523 Voided and reissued on 6/7/2018	\$75.00
12/7/2017	0000003523	Check	Reissue of Check 0000001260 Voided and reissued on 1/16/2018	\$75.00
11/20/2017	0000003451	Check	Reissue of Check 0000003040	\$75.00

Status: Shows the status of this participant.

[Profile](#) [Dependents](#) [Account Summary](#) [Enrollments](#) [Contributions](#) [Claims](#) [Payments](#) **Status** [Debit Card](#)

Employee Status History

Status Effective Date	Status	Status Details	Actions
1/1/2010	Active	No Additional Details	Add New Status

Debit Card: This tab provide details on the cardholder – including when the card was mailed to the participant.

[Profile](#) [Dependents](#) [Account Summary](#) [Enrollments](#) [Contributions](#) [Claims](#) [Payments](#) [Status](#) **Debit Card**

Debit Card Information

Cardholder	Card Number	Card Status	Mail Date
No records were found.			

Purse Information

Plans	Purse Status ?
No records were found.	