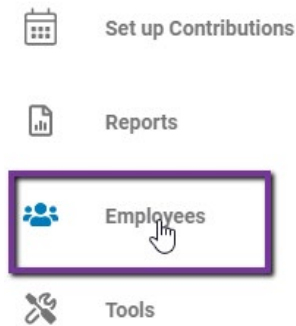


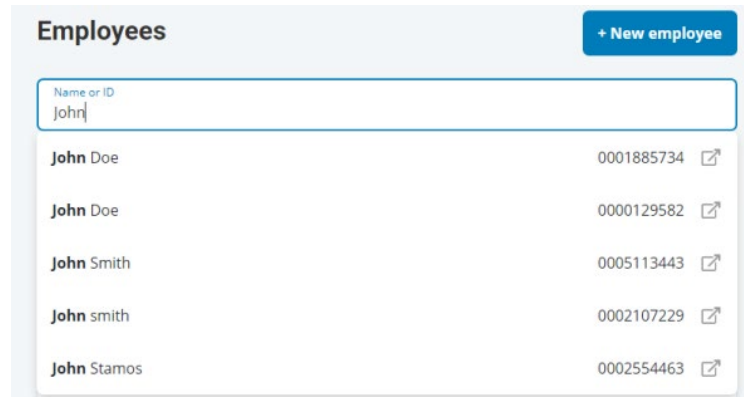
The isolved Benefit Services Online Portal provides you with the ability to review participant data including profile information, account summary, enrollments, account balance, claims and payments. This guide is designed to help you with finding this data within the Online Portal.



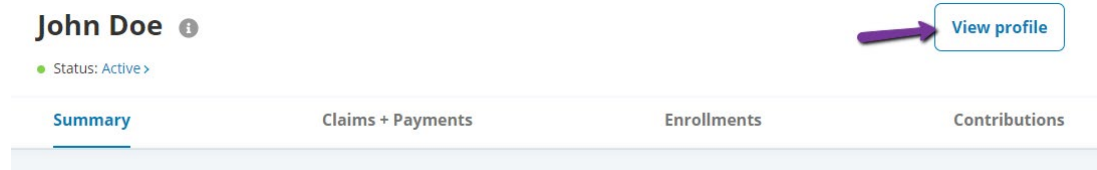
Account Balance

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

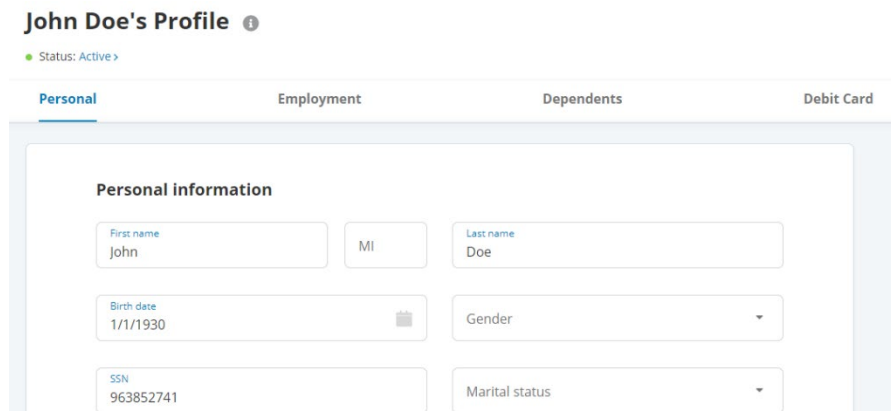
Start typing the employees first (or last) name and you will see active employees that meet what you have typed. Select the name you want to review.



From this page you can “View Profile” on participant.



Within the “View Profile” section you can view “Personal”, “Employment”, “Dependents” and “Debit Card”.



Summary: View Active enrollments, participant's activity and contributions.

John Doe ⓘ [View profile](#)

● Status: Active >

Summary Claims + Payments Enrollments Contributions

Active enrollments [View all](#)

Health Care Account \$1,500.00 annual election	Effective Jan 1, 2021 Active	>
Health Care Account \$1,000.00 annual election	Effective May 1, 2020 Active	>
Dependent Care \$2,500.00 annual election	Effective Jan 1, 2021 Active	>
Transit \$50.00/month	Effective Jan 1, 2021 Active	>

John's activity

Enrolled in Dependent Care	Jan 1, 2021	>
Enrolled in Transit	Jan 1, 2021	>
Enrolled in Health Care Account	Jan 1, 2021	>
Health Care Account updated	May 15, 2020	>
Enrolled in Health Care Account	May 1, 2020	>
Enrolled in Limited FSA	Sep 20, 2019	>
Enrolled in Health Care Account	Jan 1, 2019	>

Contributions [View all](#)

\$92.59 Dependent Care	Posted Mar 12, 2021	>
\$55.56 Health Care Account	Posted Mar 12, 2021	>
\$22.22 Transit	Posted Mar 12, 2021	>

Claims + Payments: Provides any claims and payments that were processed for this participant.

John Doe ⓘ

● Status: Active >

Summary **Claims + Payments** Enrollments

Claims ▾ [Sort by date \(descending\)](#) ▾

\$500.00 Denied	Date of service Aug 13, 2017 Health Care Account
\$351.70 Denied	Date of service Jul 25, 2017 Health Care Account

Enrollments: Providing details on the active enrollments – both current and prior plan years.

John Doe ⓘ

● Status: Active >

Summary Claims + Payments **Enrollments**

Active: 01/1/2021 - 12/31/2021 [+ New enrollment](#)

Payment method: Check

Health Care Account \$1,500.00 annual election	Effective Jan 1, 2021 Active
Dependent Care \$2,500.00 annual election	Effective Jan 1, 2021 Active
Transit \$50.00/month	Effective Jan 1, 2021 Active

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

John Doe ⓘ





[View profile](#)

● Status: [Active >](#)

Summary Claims + Payments Enrollments **Contributions**

Contributions

Sort by date (descending) ▾

 \$92.66 Dependent Care	Dec 31, 2021 Scheduled
 \$55.44 Health Care Account	Dec 31, 2021 Scheduled
 \$22.28 Transit	Dec 31, 2021 Scheduled
 \$92.59 Dependent Care	Dec 17, 2021 Scheduled

FILTERS

Account type
Non-HSA

Account
All

There are filters throughout these pages to allow you to filter data, e.g., the Contribution page allows you to filter by Account type.