

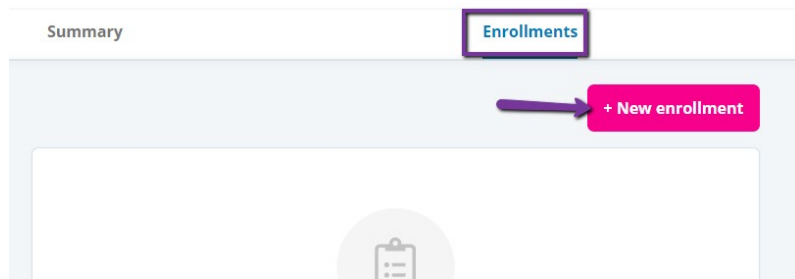
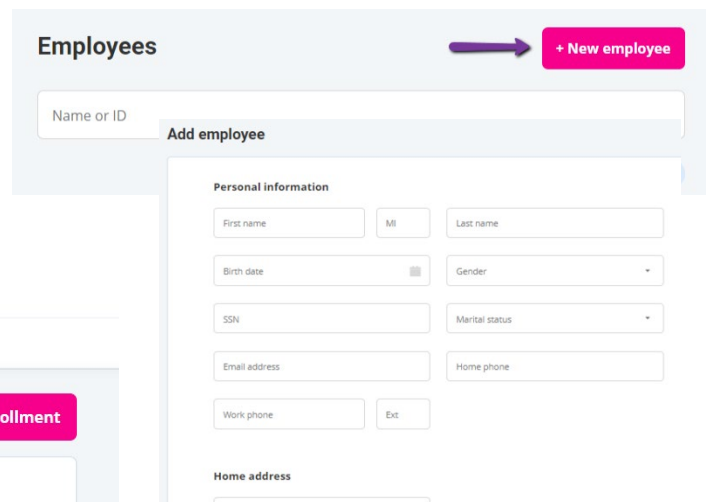
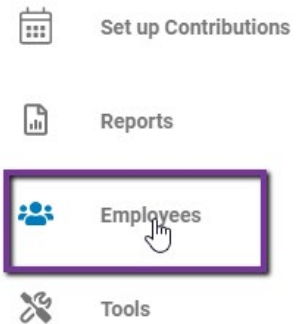
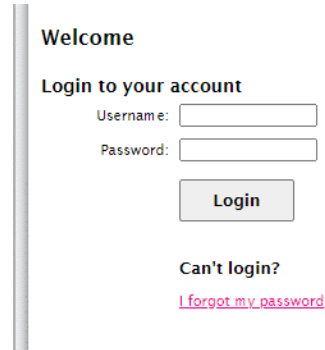
This one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs). This includes entering enrollments online.

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 Enrollment – New Participant

1. Select **Employees** on the left menu.
2. Click **+New Employee**.
3. Fill in required fields under personal information.
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**.
6. You will see the confirmation of employee being added.
7. Click on **Enrollments** to set up plan(s)
8. Selet **+New Enrollment**



9. Select plan year to enroll the participant, click **Next**
10. Select plan(s) to enroll the participant, click **Next**

This screenshot shows the 'Select plan year' step. At the top, a progress bar indicates the current step is '1 Plan year', with '2 Plans', '3 Payment method', and '4 Plan details' following. Below the progress bar, the title 'Select plan year' is centered. Two plan year options are displayed in white boxes with rounded corners. The first option is '01/01/2021-12/31/...' with a calendar icon and the dates 'Jan 1, 2021 - Dec 31, 2021'. The second option is '7/1/2020-6/30/2021' with a calendar icon and the dates 'Jul 1, 2020 - Jun 30, 2021'.

This screenshot shows the 'Select one or more plans' step. At the top, a progress bar indicates the current step is '2 Plans', with '1 Plan year', '3 Payment method', and '4 Plan details' following. Below the progress bar, the title 'Select one or more plans' is centered. Three plan options are shown in white boxes with rounded corners. Each box contains an icon, a title, and a 'Learn more' link. The first option is 'Health Care Account' with a medical kit icon. The second is 'Dependent Care' with a person icon. The third is 'Transit' with a train icon.

11. Select the payment method from options shown, click **Next**
12. Enter effective date and annual election amount.
 - a. For HRA plans, the amount is pre-loaded
 - b. For transit – enter amount per month
13. Click **Submit** to complete enrollment.
 14. If the employee can be enrolled in another plan, select **+New enrollment** for any additional plan(s).
15. An automatic email will be provided to the participant with a guide to the online portal.
16. To review the enrollment, selections, go to “Enrollments” tab under the employee’s record.

This screenshot shows the 'Select primary payment method' step. At the top, a progress bar indicates the current step is '3 Payment method', with '1 Plan year', '2 Plans', and '4 Plan details' following. Below the progress bar, the title 'Select primary payment method' is centered. Two payment method options are shown in white boxes with rounded corners. The first option is 'Check' with a check icon and a blue checkmark in the top right corner. The second option is 'Direct Deposit' with a dollar sign icon and the text 'Employee will need to setup a bank account' below it.

This screenshot shows the 'New enrollment' summary screen. At the top, a progress bar indicates all steps are complete: '1 Plan year', '2 Plans', '3 Payment method', and '4 Plan details'. Below the progress bar, the title 'Select plan details' is centered. The screen displays the following information:

- Health Care Account**: Effective date: 01/01/2021
- Employee elections**: Annual employee election: \$500.00; Payroll frequency: Bi-Weekly; Estimated payroll amount: \$19.23