

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**.

### Welcome

#### Login to your account

Username:

Password:

**Login**

Can't login?

[I forgot my password](#)

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

1. Select the **Employees** within left menu
2. Search for employee to enroll
3. Click on **Enrollments**
4. Click on **+New Enrollment**



Set up Contributions



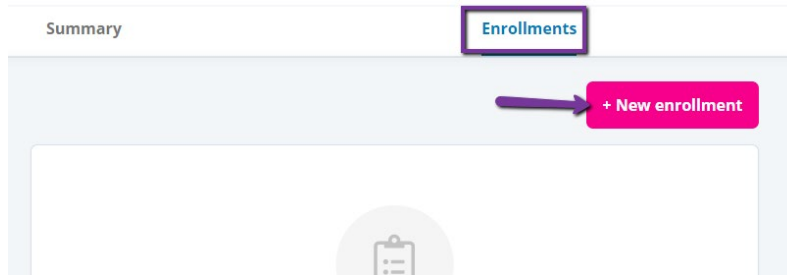
Reports



Employees



Tools



5. Select plan year to enroll the participant, click **Next**
6. Select plan(s) to enroll the participant, click **Next**

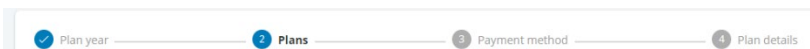
#### Select plan year

01/01/2021-12/31/...

Jan 1, 2021 - Dec 31, 2021

7/1/2020-6/30/2021

Jul 1, 2020 - Jun 30, 2021



#### Select one or more plans



Health Care Account

[Learn more](#)



Dependent Care

[Learn more](#)



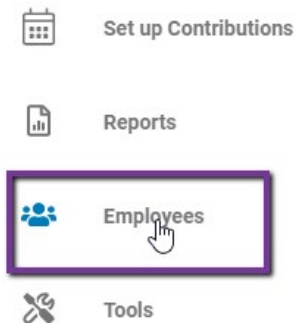
Transit

[Learn more](#)

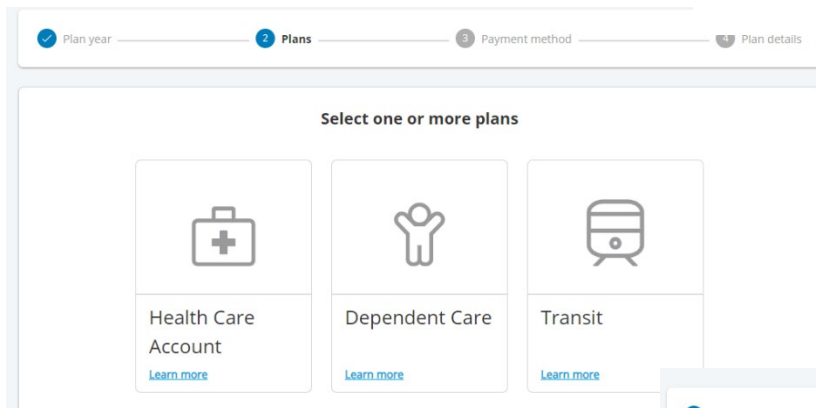
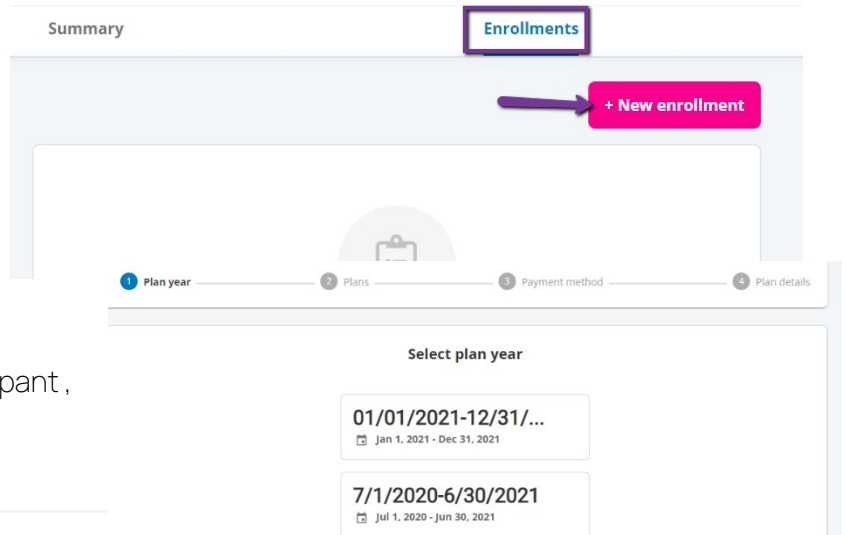
7. Select the payment method from options shown, click **Next**
8. Enter effective date and annual election amount.
  - a. For HRA plans, the amount is pre-loaded
  - b. For transit – enter amount per month
9. Click **Submit** to complete enrollment.
10. If the employee can be enrolled in another plan,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

## Online Enrollments – New Participant

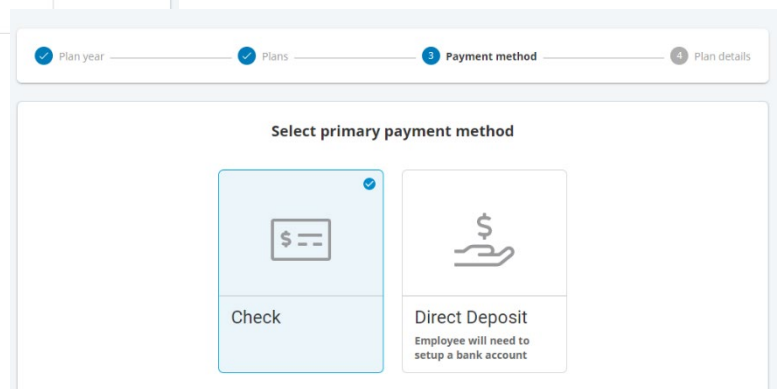
1. Select **Employees** on the left menu.
2. Click **+New Employee**.
3. Fill in required fields under personal information.
4. Fill in required fields under employment information.
  - a. Hire date = date employee was hired
  - b. Payroll frequency = how often is payroll processed for the employee
  - c. Payroll frequency effective date = same as the hire date
  - d. Set up division, class, class effective date and hours worked per week



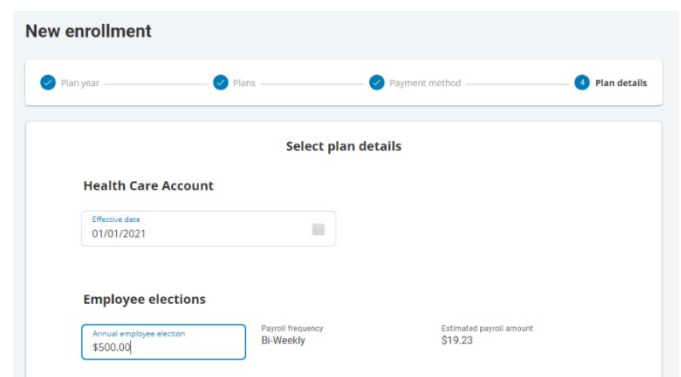
5. Click **Add Employee**.
6. You will see the confirmation of employee being added.
7. Click on **Enrollments** to set up plan(s)
8. Select **+New Enrollment**
9. Select plan year to enroll the participant, click **Next**
10. Select plan(s) to enroll the participant , click **Next**



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

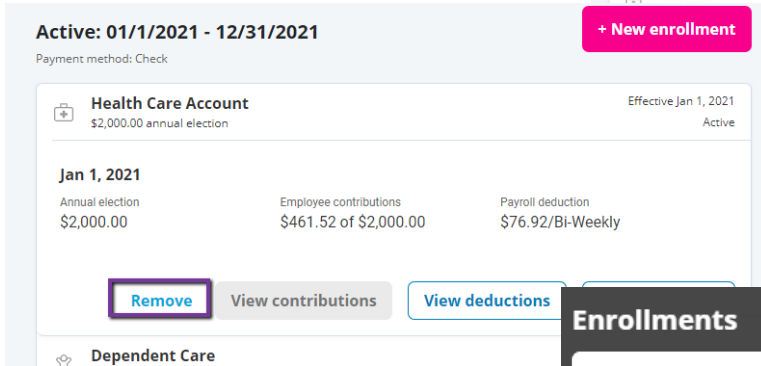
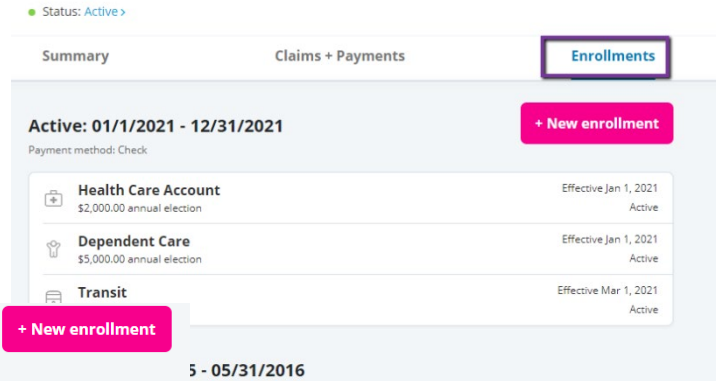


13. Click **Submit** to complete enrollment.
14. If the employee can be enrolled in another plan, select **+New enrollment** for any additional plan(s).
15. An automatic email will be provided to the participant with a guide to the online portal.
16. To review the enrollment, selections, go to “Enrollments” tab under the employee’s record.



## Online Enrollments – Remove Enrollment

1. Select **Employee** from left menu
2. Search for employee to remove
3. Click on **Enrollments**
4. Select the Account(s) to remove participant
5. Click on **Remove**



6. You will be prompted confirm removal.

