

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 the employees tab.
2. Click **Add 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**.

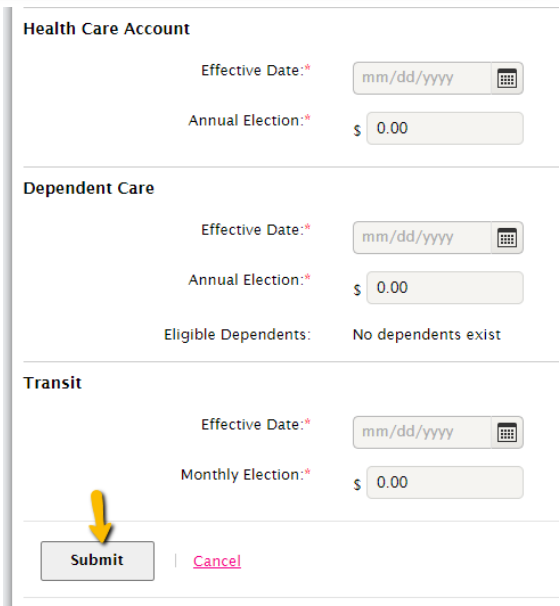
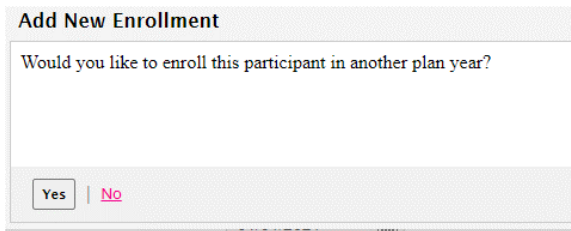
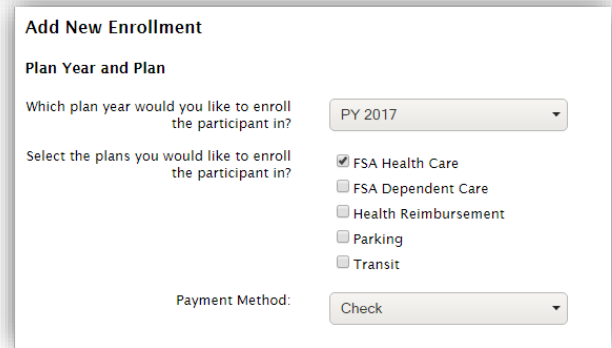
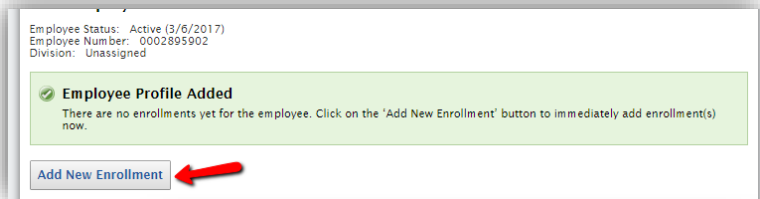
\* Required Field



**Add Employee**

| [Cancel](#)

6. You will see the confirmation of employee being added.
7. Within that confirmation box, click **Add Enrollment**.
8. Select plan year to enroll the participant from the drop-down menu
9. Select plan(s) to enroll the participant
10. Select the payment method from the drop-down menu
11. Enter effective date and annual election amount.
  - a. For HRA plans, the amount is pre-loaded
  - b. For transit – enter amount per month
12. Click **Submit** to complete enrollment.
13. If the employee can be enrolled in another plan year, you will see a dialog box asking if you want to enroll the participant in another plan year.
  - a. If yes is selected, the **Add New Enrollment** page follows
  - b. If no is selected, the **Enrollment** page confirmation message “You have successfully added enrollment(s)” follows.



14. An automatic email will be provided to the participant with a guide to the online portal.
15. To review the enrollment, selections, go to “Enrollments” tab under the employee’s record.

Profile Dependents Account Summary **Enrollments** Contributions Claims Payments Status Debit Card

**Active Accounts**

1/1/2021 - 12/31/2021

Payment Method: Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
Dependent Care - Active	1/1/2021	\$200.00	\$0.00 of \$0.00	\$0.00 of \$200.00	\$7.69 Bi-Weekly	<a href="#">Update</a> <a href="#">Remove</a>
Transit - Active	1/1/2021	\$200.00/ Month	\$0.00/ Month	\$0.00 of \$2,400.00	\$92.31 Bi-Weekly	<a href="#">Update</a> <a href="#">Remove</a>
Health Care Account - Active	1/1/2021	\$1,200.00	\$0.00 of \$0.00	\$0.00 of \$1,200.00	\$46.15 Bi-Weekly	<a href="#">Update</a> <a href="#">Remove</a>

Employee Status: Active (12/24/1948)  
Employee Number: 0001885734  
Division: Unassigned

**Enrollment(s) Added**  
You've successfully enrolled the employee in the following plans:  
01/01/2021-12/31/2021 - Transit

**Add New Enrollment**