

Welcome to the isolated Benefit Services Employer Portal. This one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans.

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Overview

The Employer Portal is convenient and easy to use with anytime access which allows you to:

- View current and prior year plan information
- Access forms and documents
- Retrieve over 50 scheduled reports or notifications
- Access history of reports and notifications
- Load data files
- Submit service requests
- Enter enrollment/eligibility information
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Add, update and enroll employees
- Add and manage recurring contributions

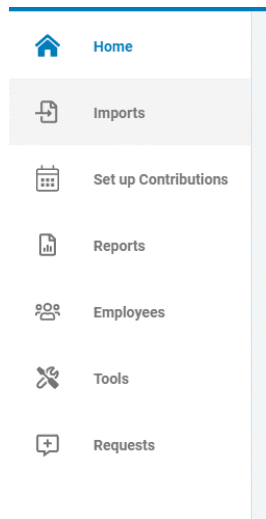
Plus, user access levels are role-based. Each role determines access rights not only to administrative pages and operations, but also to underlying data in applicable reports.

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**.

The Home Page is easy to navigate.

Once you're logged in, everything you need to efficiently and effectively manage your accounts is found on the home page. You will see a history of the reports and notifications with quick links to the latest versions. From the home page, you can:

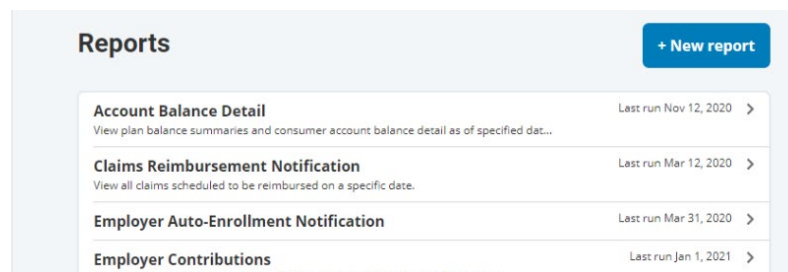
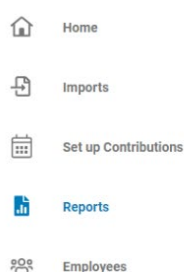
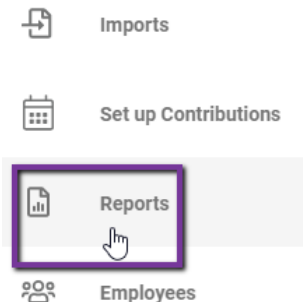


- View employee level data
- View reports
- Check on status of file imports
- Set up recurring contributions
- Log requests
- Read plan documents
- Download forms
- View the employer dashboard

You can also access the tabs at the top of the page or links at the bottom of the page for easy navigation.

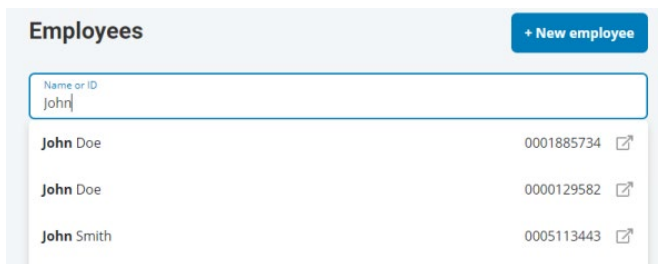
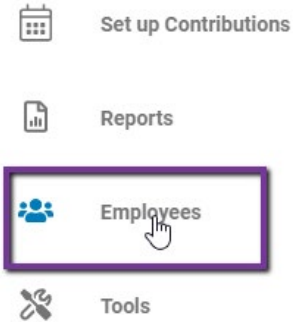
How do I view reports and notifications?

1. Select **Reports** from the left menu tab. Once opened, you will see a list of all available reports.
2. Select the relevant enrollment, financial, contribution or plan information report desired and it will automatically be displayed.
3. If there is a report that you need, but do not see, click **+New Report**. Enter required information and click **Request**.



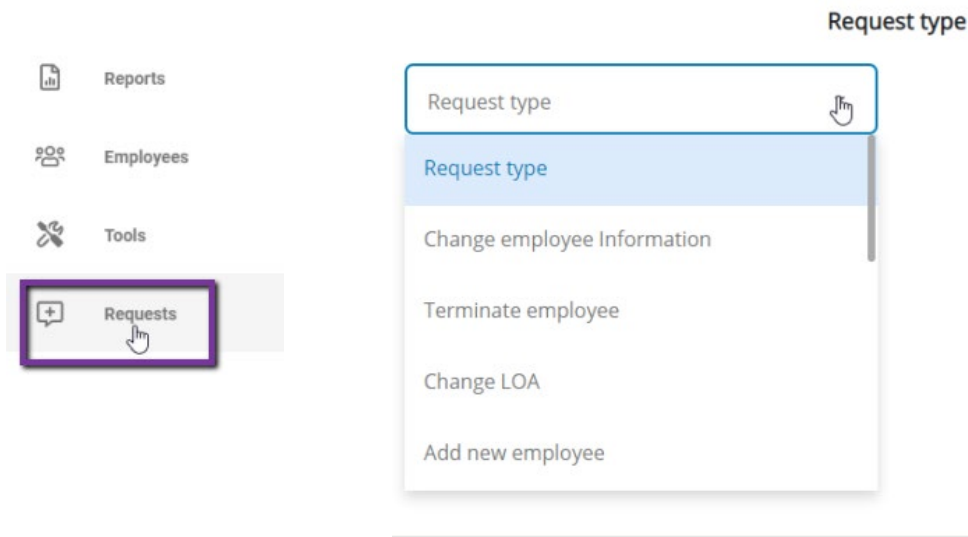
What kind of employee-level data can I access?

1. Under the **Employees** tab, you can get real-time data on all enrolled employees.
2. You can search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access the following information:
 - a. Summary
 - b. Enrollments
 - c. Activity
 - d. Claims + Payments
 - e. Enrollments
 - f. Contributions
 - g. Advance



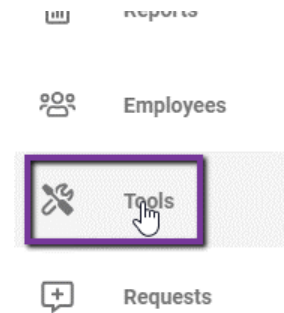
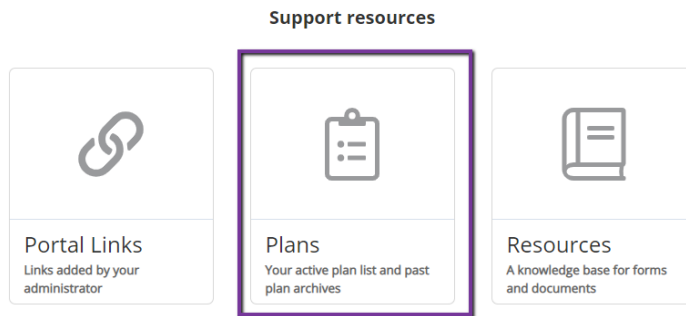
How do I get access for a new HR Rep or add new employees?

1. Click on **Requests** left menu.
2. Click on **+New Request**
3. Select the **request type**, i.e. add a new employee, add employer contact or change payroll deductions. Follow the screens to enter the data.
4. Click **Submit**
5. All requests are securely delivered



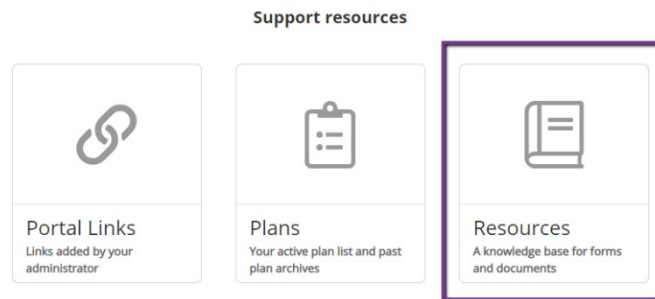
Will I be able to access plan information?

1. Select **Tools** from the left menu. Once opened you will find the following:
 - Portal Links
 - Plans
 - Resources
2. Click on **Plans** to view your active plan list and past plans



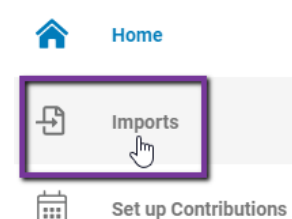
Where would I access required forms?

1. Select **Tools** (within left menu) and the **Resources** tile.
2. In this section, you can download and print any needed forms.
3. You will also have access to any other documents or custom materials related to your plans in this tab



How do I import data?

1. Select the **Imports** on the left menu. Here you can import demographic, enrollment and contribution files directly into the portal using standard CSV formatted files.
2. Select **+New import** for a new import
3. Select the **Import Type**.
4. Download formatted template if needed
5. Drag/drop or upload file
6. Check for field matches by viewing setup data.
7. Save as CSV to a location you can remember.
8. Upload file.



1 Import type — **2 Download template** — **3 Upload**

Import type

Select the template you would like to import.

Contribution
 Submit employee payroll deductions or employer contributions.

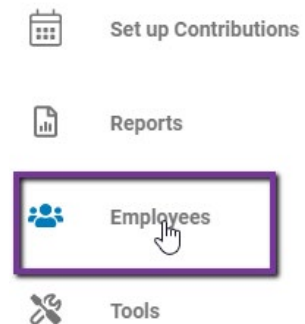
Demographic
 Add employees or update existing employees.

Dependent
 Adding or updating dependent information.

Enrollment
 Enroll employees in plans, change employee elections, or terminate existing enrollments.

Will I be able to add/enroll/update Employees?

1. Select **Employees** within the left menu
2. Select **+New employee**.
3. Enter the Personal and Employment Information.
4. Click **Add Employee**. You will see a brief confirmation that the employee was added.
5. Select the **Enrollments** tab.
6. Click **+New Enrollment**.
7. Select the **Plan Year** and click **Next**.
8. Select one or more of the plans listed and click **Next**.
9. Select the **Primary Payment Method** and click **Next**.
10. Complete the enrollment **Plan Details** for each plan listed and click **Submit**.



Employees → **+ New employee**

Name or ID

Sort alphabetically (a to z) ▾

1 Plan year — **2 Plans** — **3 Payment method**

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

New enrollment

1 Plan year — **2 Plans** — **3 Payment method** — **4 Plan details**

Select one or more plans

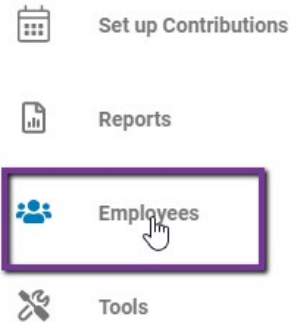
Health Care Account
[Learn more](#)

Dependent Care
[Learn more](#)

Transit
[Learn more](#)

Will I be able to update an employee status?

1. Select the **Employees** link within the left menu.
2. Search and select the employee using first name, last name, or employee identifier (employee ID or SSN)
3. Select the **Status** to see a Pop Up with Options to change
4. Select the **Status** and **Effective Date**.
5. To view status history, click on Show Status History
6. Once all data has been entered, select **Add**.



A screenshot of the 'Employees' page. At the top right is a '+ New employee' button. Below it is a search bar labeled 'Name or ID' with the text 'John' entered. Below the search bar is a table with three rows of employee data:

John Doe	0001885734	
John Doe	0000129582	
John Smith	0005113443	



A screenshot of the 'Employee status' pop-up window for John Doe. The title is 'Change John's status'. It contains three input fields: 'Status' (a dropdown menu currently showing 'Retired'), 'Effective date' (a date field showing '03/19/2021'), and 'Last payroll deduction date' (a dropdown menu showing '3/26/2021'). Below these fields is a link that says 'Show status history'. At the bottom right is an 'Add' button.