Employer Online Enrollment

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 Employee Tab
2. Search for employee to enroll
3. Click on "Enrollments" link
4. Click on "Add New Enrollment"

EMPLOYEES ▾   PLANS   RESOURCES   IMPORTS ▾   LINKS ▾

View All Employees | Add Employee

Search Employees

Last Name:
doe

First Name:
joe

Employee Number:

Employee Status:
Active

[Search]

Recently Viewed Employees

Sample, Jane (0000241218)
Dutton, Kayce (0004923498)
Doe, John (0001885734)
Doe, John (0000129582)
Sample, Sample (0000241219)

Joe Doe: Profile

Employee Status: Active (5/27/2018)
Employee Number: 0000241221
Division: Unassigned

[Add New Enrollment]

5. Select the the plan year from the drop-down menu
6. Select the enrollment plan(s)
7. Select the payment method from the drop-down menu
8. Click on "Submit"
9. Add the require plan information
10. Click on "Submit"

Add New Enrollment

Plan Year and Plan

Which plan year would you like to enroll the participant in?
[01/01/2021-12/31/2021 ▾]

Select the plans you would like to enroll the participant in?
☑ Health Care Account
☐ Dependent Care
☐ Transit

Payment Method:
[Check ▾]

Health Care Account

Effective Date:*
[1/01/2021 📅]

Annual Election:*
$ [600]

[Submit] | Cancel

11. 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, the "Add New Enrollment" page follows

    b. If no, the Enrollment page confirmation message "You have successfully added enrollment(s)" follows

12. You can confirm the enrollment by reviewing the employee's information, Enrollments tab.

Add New Enrollment

Would you like to enroll this participant in another plan year?

Yes | No

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

Joe Doe: Enrollments

Employee Status: Active (5/27/2018)
Employee Number: 0000241221
Division: Unassigned

Add New Enrollment

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
Health Care Account - Active	1/1/2021	$600.00	$0.00 of $0.00	$0.00 of $600.00	$23.08 Bi-Weekly	Update Remove

1/1/2020 - 12/31/2020

Online Enrollments – New Participant

1. Select the Employee Tab
2. Click on "Add Employee"
3. Fill in required fields
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

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EMPLOYEES ▾   PLANS   RESOURCES   IMPORTS ▾   LINKS ▾

View All Employees | Add Employee

Search Employees   **Recently Viewed Employees**

Last Name: smith, jason (0002568440)

First Name: Bennett, Elizabeth (0002477924)
                              Ainsley - sample, Shannon
                              (0001885743)
Employee Number: Axely, Jonathon (0001885744)
                              Miller, Jane (0001885733)
Employee Status:
Active ▾

Search

Add Employee Profile

Personal Information

* First Name: [   ]

Middle Initial: [   ]

* Last Name: [   ]

* Birth Date: [mm/dd/yyyy] 📅
Format date as mm/dd/yyyy.

* SSN: [   ]-[ ]-[   ]

5. Click **Add Employee**.
6. You will see the confirmation of employee being added.
7. Within that confirmation box, click **Add Enrollment**.

* Required Field   ➤   **Add Employee** | Cancel

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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.
    c. If yes is selected, the **Add New Enrollment** page follows
    d. If no is selected, the **Enrollment** page confirmation message "You have successfully added enrollment(s)" follows.

14. You will receive a confirmation statement that the enrollment was successfully processed.
15. An automatic email will be provided to the participant with a guide to the online portal.

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Benefit Services

Online Enrollments – Remove Enrollment

1. Select the Employee Tab
2. Search for employee to remove
3. Click on "Enrollments" tab
4. Find the Account
5. Click on "Remove" within the "Actions" column

EMPLOYEES ▼	PLANS	RESOURCES	IMPORTS ▼	LINKS ▼

View All Employees | Add Employee

Search Employees   **Recently Viewed Employees**

Last Name: Doe, John (0001885734)

First Name: Sample, Jane (0000241218)

     Doe, Joe (0000241221)

Employee Number: Dutton, Kayce (0004923498)

     Doe, John (0000129582)

Employee Status: Active

[Search]

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 ❓
Health Care Account - Active	1/1/2021	$600.00	$0.00 of $0.00	$0.00 of $600.00	$23.08 Bi-Weekly	Update Remove

1/1/2020 - 12/31/2020
Payment Method: Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction ❓	Actions ❓
Health Care Account - Active	1/1/2020	$2,750.00	$0.00 of $0.00	$2,432.71 of $2,750.00	$105.77 Bi-Weekly	Update Remove

1/1/2019 - 12/31/2019

6. You will be prompted to "Continue" to confirm your Removal

Remove Enrollment

Selecting 'Remove' removes the enrollment for this employee including elections, deductions, employer contributions, and transactions.
Are you sure you want to continue?

[Continue] | Cancel