

# **Employer Online Enrollment**

Welcome

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.
- Once the password is updated and confirmed, click Lo

	Login to your account Username: Password:
Login.	Login Can't login? I forgot my password
	PLANS RESOURCES IMPORTS ▼ LINKS ▼ <u>/ees</u> <u>Add Employee</u>
Search Employed Last Name: [doe First Name: [joe] Employee Num be [	Sample, Jane (0000241218)           Dutton, Kavce (0004923498)           Doe, John (0001885734)           Doe, John (0000129582)

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

- 1. Select the Employee Tab
- 2. Search for employee to enroll
- 3. Click on "Enrollments" link

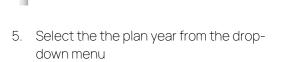
Joe Doe: Profile

Division: Unassigned

Add New Enrollment

4. Click on "Add New Enrollment"

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



- 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
---------	------------

Search

#### Plan Year and Plan

м

EMP

Which plan year would you like to enroll the participant in?	
Select the plans you would like to enroll	

the participant in?

🗹 Health Care Account
Dependent Care
Transit

Check

01/01/2021-12/31/2021

Payment Method:

Health Care Account Effective Date:\* 1/01/2021 Annual Election:\* s 600 Submit Cancel

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### **Employer Online Enrollment**

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

You've successfully enrolled the employee in the following plans: 01/01/2021-12/31/2021 - Transit

Add New Enrollment

Yes

No

Enrollment(s) Added

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

- 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, Enrolments tab.

Joe Doe: Enrolln						
Employee Status: Activ Employee Number: 000 Division: Unassigned						
Add New Enrollmen	nt					
Profile Dependents A	Account Sum ma	Enrollments	Contributions Cla	<u>aims Payments Statu</u>	is Debit Card	
Active Accounts						
1/1/2021 - 12/31/20 Payment Method: Check						
Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll 7 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	
1/1/2021 - 12/31/20 Payment Method: Check Account Health Care Account	Effective Date 1/1/2021	Election	Contributions	Contributions	Deduction \$23.08	Update

#### 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

l	EMPLOYEES V	PLANS	RESC	URCES	IMPORTS V	LINKS V
1	<u>View All Emp</u>	oloyees	Add	<b>Smploy</b>	ee	
	Search Emplo	oyees		Recent	ly Viewed Em	ployees
	Last Name:			<u>smith, j</u>	<u>ason (0002568</u>	<u>440)</u>
ł				<u>Bennett</u>	<u>, Elizabeth (000</u>	<u>2477924)</u>
	First Name:			<u>Ainsley</u> (00018)	<u>- sample, Shanr</u> 85743)	<u>ion</u>
I	Employee Num	ber:		<u>Axely, J</u>	onathon (00018	<u>385744)</u>
I				<u>Miller, J</u>	ane (00018857	<u>33)</u>
	Employee Statu Active	JS:				
	Search					

ersonal Information	
* First Name:	
Middle Initial:	
* Last Name:	
* Birth Date:	m m /dd/yyyy

#### 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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Add New Enrollment

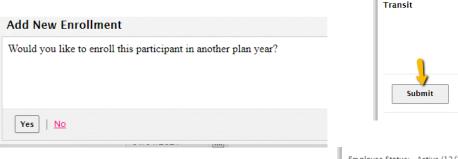
# **Employer Online Enrollment**

Employee Status: Active (3/6/2017)
Employee Number: 0002955902 Division: Unassigned
Employee Profile Added There are no enrollments yet for the employee. Click on the 'Add New Enrollment' butto now.

# 8. Select plan year to enroll the participant from the drop-down menu

to immediately add enrollment(s)

- 9. Select plan(s) to enroll the participant
- 10. Select the payment method from the dropdown menu
- 11. Enter effective date and annual election amount.
  - a. For HRA plans, the amount is preloaded
  - b. For transit enter amount per month
- 12. Click Submit to complete enrollment.
- 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.

dd New Enrollment	
lan Year and Plan	
hich plan year would you like to enroll the participant in?	PY 2017 •
elect the plans you would like to enroll the participant in?	FSA Health Care FSA Dependent Care Health Reimbursement Parking Transit
Payment Method:	Check -
Annual Election:* Dependent Care	\$ 0.00
Dependent Care	
Effective Date:*	mm/dd/yyyy
Annual Election:*	\$ 0.00
Eligible Dependents:	No dependents exist
Transit	
Effective Date:*	mm/dd/yyyy
Monthly Election:*	\$ 0.00
Submit <u>Cancel</u>	

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

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# **Employer Online Enrollment**

### **Online Enrollments - Remove Enrollment**

- 1. Select the Employee Tab
- 2. Search for employee to remove
- 3. Click on "Enrollments" tab
- 4. Find the Account

Profile Dependents Account Summary

Effective Date

5. Click on "Remove" within the "Actions" column

Enrollments

Annual Election

\$600.00

ent							
		EMPLOYEES V PL	LANS RES	OURCES	IMPORTS V	LINKS 🔻	
		View All Employe	ees Ad	<u>d Employe</u>	<u>e</u>		
ve	8)	Search Employee	5	Recent	y Viewed Em	ployees	
	_	Last Name:		<u>Doe, Joh</u>	n (000188573	4)	
				<u>Sample,</u>	J <u>ane (0000241</u>	218)	
'Actions" colu	imn <sup>er</sup>	First Name:		Doe, Joe	(0000241221)	L I	
				Dutton,	<u>Kayce (000492</u>	<u>3498)</u>	
		Employee Number:		<u>Doe, Joh</u>	<u>n (000012958)</u>	<u>2)</u>	
		Employee Status:	-				
	<u>a</u> 	Active	~			-	
		Search					
Contributions Cl	<u>aims Payments</u> Statu	. Debit Card		- E			
	anns <u>Payments</u> Statt	is <u>Debit Caro</u>					
				_			
Employer Contributions	Employee Contributions	Payroll 7 Deduction	Actions	?			

#### 11/2020 10/01/0000

Health Care Account 1/1/2021

Active Accounts 1/1/2021 - 12/31/2021 Payment Method: Check

Account

Active

1/1/2020 - 12/31/20 Payment Method: Check						
Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll 7	Actions የ
Health Care Account - Active	1/1/2020	\$2,750.00	\$0.00 of \$0.00	<u>\$2,432.71</u> of \$2,750.00	\$105.77 Bi-Weekly	<u>Update</u> <u>Remove</u>

\$0.00 of \$0.00

\$0.00 of \$600.00

1/1/2019 - 12/31/2019

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

#### **Remove Enrollment**

\$23.08 Bi-Weekly

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

Continue Cancel

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