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Employer Portal Quickstart Guide

Welcome to BeneFLEX's 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 such as Flexible Spending Accounts (FSA), Health Reimbursement Arrangements (HRA), Transportation Management Accounts (TMA), and Health Care Security Ordinance Accounts (HCSO).

Employer Portal

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Features:

- View current and prior year plan information
- Access forms and documents
- Retrieve reports
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Add, update, and enroll employees

Administrative rights are based on your user access level. Each role determines access rights not only to administrative pages and operations, but also to underlying data in applicable reports. Access level is determined by the employer.



Access the Employer Portal

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- Go to www.beneflexhr.com
- Enter username and password
 - BeneFLEX will automatically send you and your assigned contacts a username and a temporary password via email.
 - Temporary password is only valid for 2 days.
- Upon first login, you will be prompted to change the password.
- Once password is updated and confirmed, click **Login**.

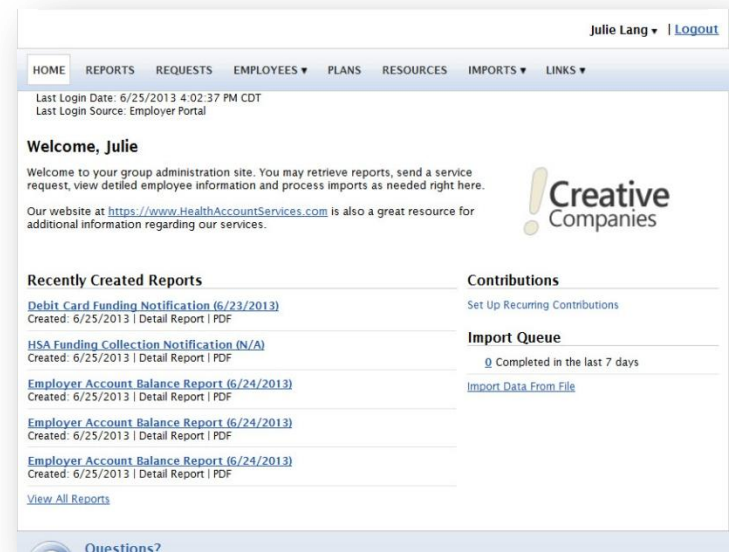
The Home Page is Easy to Navigate

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Once you're logged on, everything you need to efficiently and effectively manage accounts can be 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:

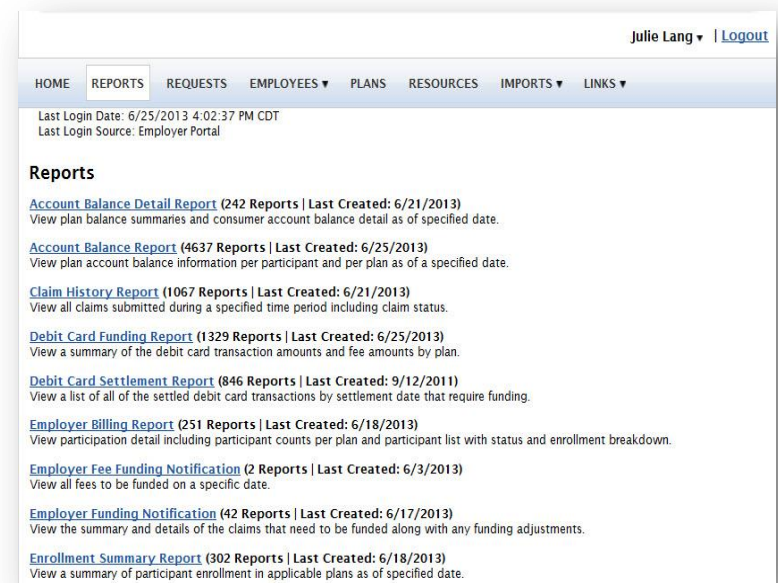
- ❑ View recently created reports
- ❑ Access recently viewed employees
- ❑ Access the tabs at the top of the page or the quick links at the bottom of the page to easily navigate the portal.



View Reports & Notifications

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1. On the **Home Page**, under the **Reports** tab, there will be a list of all available reports that can be viewed.
2. Click on the report you would like to view.
3. If there is a report that you need, but do not see, you can contact BeneFLEX and request it.



New Feature

Employers can now create selected reports on-demand in the Employer Portal. Simply click the RUN button next to the available report, then enter the required details.

Access Your Employees in the Portal

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1. Under the tab titled **Employees**, 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:
 - Profile
 - Dependents
 - Account Summary
 - Enrollments
 - Contributions
 - Claims
 - Payments
 - Status

June Lang | Logout

HOME REPORTS REQUESTS EMPLOYEES PLANS RESOURCES IMPORTS LINKS

Last Login Date: 6/25/2013 4:02:37 PM CDT
Last Login Source: Employer Portal

Cole Apollo: Enrollments

Employee Status: Active (4/1/2000)
SSN: xxx-xx-0000
Division: Unassigned
HSA Status: Pending
HSA Hold: Holds exist on this consumer's account that prevent financial transaction processing.

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

Add Enrollment

Active Accounts
1/1/2013 - 12/31/2013
Payment Method: Reimburse Myself By Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
Healthcare FSA	1/1/2013	\$1,500.00	\$0.00 of \$0.00	\$0.00 of \$1,500.00	\$57.69 Bi-weekly	Update
Dependent Care FSA	1/1/2013	\$5,000.00	\$0.00 of \$0.00	\$0.00 of \$5,000.00	\$192.31 Bi-weekly	Update

June Lang | Logout

HOME REPORTS REQUESTS EMPLOYEES PLANS RESOURCES IMPORTS LINKS

Last Login Date: 6/25/2013 4:02:37 PM
Last Login Source: Employer Portal

[View All Employees](#) [Add Employee](#)

Welcome, Julie

Welcome to your group administrator request, view detailed employee information.

Our website at <https://www.HealthAcademy.com> has additional information regarding our services.

Recently Created Reports

- [Debit Card Funding Notification \(6/25/2013\)](#) Created: 6/25/2013 | Detail Report | PDF
- [HSA Funding Collection Notification \(6/25/2013\)](#) Created: 6/25/2013 | Detail Report | PDF
- [Employer Account Balance Report \(6/25/2013\)](#) Created: 6/25/2013 | Detail Report | PDF
- [Employer Account Balance Report \(6/24/2013\)](#) Created: 6/25/2013 | Detail Report | PDF
- [Employer Account Balance Report \(6/24/2013\)](#) Created: 6/25/2013 | Detail Report | PDF

Search Employees

Last Name:

First Name:

SSN:

Employee Status:

Recently Viewed Employees

- [Apollo, Cole \(xxx-xx-0000\)](#)
- [Andrews, Jordan \(xxx-xx-2222\)](#)
- [Bailey, Jim D](#)
- [Isia, Maria \(xxx-xx-0999\)](#)
- [Outlooker, Sample J](#)

*Dependent upon user access level. Refer to page 2 for details.

Access Plan Information

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1. Under the **Plans** tab, you will find options to view the same information as the employees for all active and inactive plans.
2. Information available:
 - Plan Summaries
 - Plan Details and Rules
 - Summary Plan Description (SPD)

Access Forms

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1. Under the **Resources** tab.
2. In this section you can download and print forms.

Add/Enroll/Update Employees*

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1. Under the **Employees** Tab
2. Select **Add Employee**
3. Enter the Personal and Employment Information
4. Click **Add Employee**
5. In the Confirmation section click **Add Enrollment**
6. Select the plan and click **Enroll**
7. Enter the Effective Date and Election/Employer Contribution
8. Click **Add Enrollment(s)**

*Dependent upon user access level. Refer to page 2 for details.

Update an Employee Status*

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1. Under the **Status** tab
2. In the Actions section, click **Add New Status**
3. Select the **Status** from the drop down menu
4. Enter the **Status Effective** as of date
5. Click **Add Status**

*Dependent upon user access level. Refer to page 2 for details.

Customer Service

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❑ Office Hours

7:00 a.m. to 6:00 p.m. CST

❑ Phone

314-909-6979

800-631-3539 (toll free)

❑ Email

info@beneflexhr.com



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HR RESOURCES INC.

Questions

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