Employee Portal Quickstart Guide

Welcome to your BeneFLEX Employee Portal. This one-stop portal gives you 24/7 access to view information and manage your Flexible Spending Account (FSA), Health Reimbursement Account (HRA), Transportation Management Account (TMA), and Health Care Security Ordinance Account (HCSO).

Employee Portal

Features:

- ❑ Submit claims
- ❑ Upload receipts
- ❑ Track expenses
- ❑ View account balance and activity
- ❑ View payment and claims history
- ❑ Report a Benny Card lost/stolen
- ❑ Update profile information
- ❑ Access plan information, forms, and notifications

How Do I Log on to the Home Page?

1. Go to www.beneflexhr.com
2. Enter your login ID and password
   - Your username is the first initial of your first name, your last name, the last four digits of your SSN, and your two letter home state abbreviation.

     For Example: Judy Smith 000-00-1234 Missouri

     Username: jsmith1234mo (not case sensitive)

     Temporary Password: beneflex (all lower case)
3. Click **Login**

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The Home Page is Easy to Navigate

- Easily access the **Available Balance** and **Account Summary** page, where you can view and manage your accounts.
- The **I Want To…** section, located in the left-hand navigation pane, contains the most frequently used features for the Employee Portal.
- The **Message Center** displays alerts and relevant links that enable you to keep current on your accounts. (i.e. Benny Card receipt requests, Benny Card repayments, etc.)
- The **Quick View** graphically displays key account information.

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Change My Login and/or Password?

- From the **Home Page**, click on the **Profile** tab, then click **Login Information** on the left-hand navigation bar.
- Follow instructions on the screen. (For a new account, the first time you log in you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
- Click **Save.**

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Update My Personal Profile

- From the **Home Page**, under the **Profile** tab, you will find links to update profile information including profile summary details, dependents, and beneficiaries.
- Click the appropriate link on the Profile screen for your updates: **Update Profile** or **Add/Update Dependent** or **Add Beneficiary.** Some profile changes will require you to answer an additional security question.
- Complete your changes in the form.
- Click **Submit.**

Sign-up for Direct Deposit

The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit.

- From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the **"How Do I"** section.
- Select **Reimburse Method: Direct Deposit** and click **Change Payment Method**. The **Add Bank Account: Direct Deposit Setup** page displays.
- Enter your bank account information, and click **Submit.**
- The **Payment Method Changed** confirmation displays.

Think Fast Money

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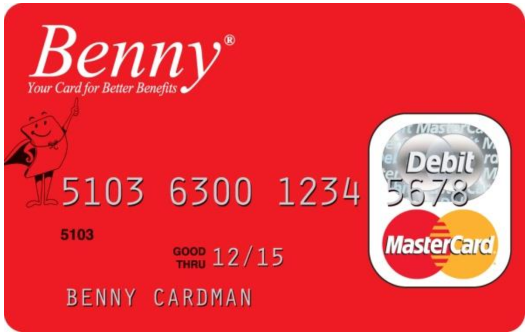
Report My Benny Card Missing and/or Request a New Benny Card

- From the **Home Page,** under the **Profile** tab, click the **Banking/Cards** link on the left-hand side of the screen.
- Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.



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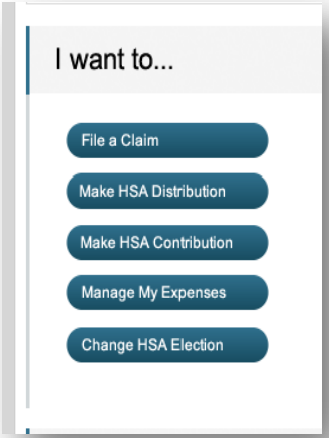
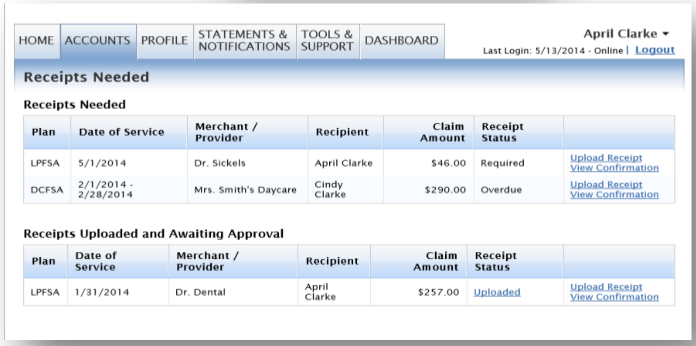
File a Claim & Upload a Receipt

1. On the **Home Page**, select "**File a Claim**" which is located on the left-hand side of the Home Page **OR** from any page on the portal, you may expand the "I want to…" section on the top right-hand side of the screen.
2. Begin by choosing the account from which you would like to receive reimbursement. Then, upload the receipt and click **Next** to enter the remaining claim information. Once the information has been added, click **Next** and your **c**laim will be added to the **Claims Basket**.
3. To add more than one claim, click **Add Another**. Once you have entered all of your claims, click **Submit** to send the claims for processing. Your claim must be submitted prior to logging out of the portal. Once you log out, the claims being held in the **Claims Basket** will be deleted.
4. You may print the **Claim Confirmation Form** as a record of your submission.
5. A listing of claims requiring receipts will appear on the **Home Page** in the **Message Center**. To view receipts, click on the **Receipts Needed** link. You may then upload a copy of the receipt by clicking on the link **Upload Receipt** and then following the instructions. Once the receipt has been successfully upload you will receive a confirmation that states: "Your receipt has been uploaded.
6. You may also view your confirmation page by clicking on the **View Confirmation** and print the form for your records.





Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status	
LPFSA	5/1/2014	Dr. Sickels	April Clarke	$46.00	Required	Upload Receipt View Confirmation
DCFSA	2/1/2014 - 2/28/2014	Mrs. Smith's Daycare	Cindy Clarke	$290.00	Overdue	Upload Receipt View Confirmation

Receipts Uploaded and Awaiting Approval

Plan	Date of Service	Merchant / Provider	Recipient	Claim Amount	Receipt Status	
LPFSA	1/31/2014	Dr. Dental	April Clarke	$257.00	Uploaded	Upload Receipt View Confirmation

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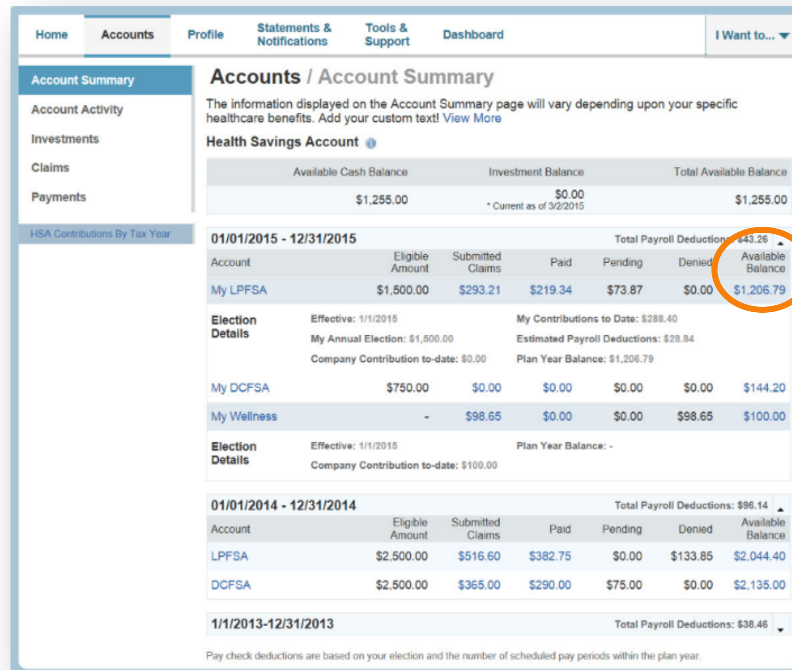
View Account Balance & Activity

- For current Account Balance only, on the **Home Page**, see the **Available Balance** section.
- For account activity, click on the **Available Balance** link on the Home Page and this will direct you to the Account Summary Page. From there, you may click on the underlined dollar amounts for more detail.



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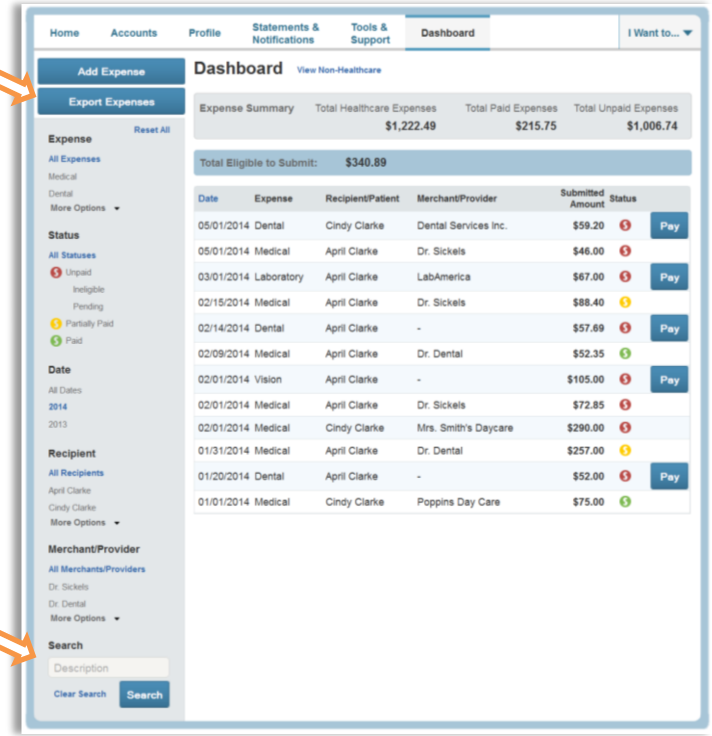
Track Expenses

- On the **Dashboard** tab, you can easily view healthcare and non-health care expenses for ongoing management of medical claims, Benny Card transactions, and dependent care claims.
- Easily filter expenses by clicking on the **filter options** on the navigation pane on the left side of the screen or by clicking on the **field headers** within the Dashboard.
- You can search for specific expenses using the **search field** on the bottom left side of the screen.
- Expenses can be exported into an Excel spreadsheet by clicking on the **Export Expenses** button on the upper left side of the page.



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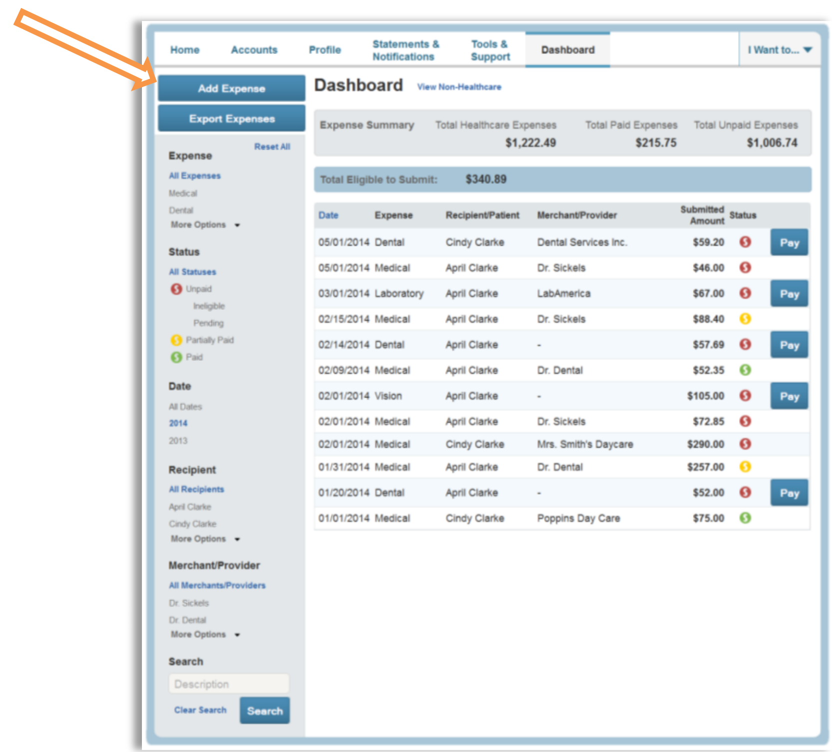
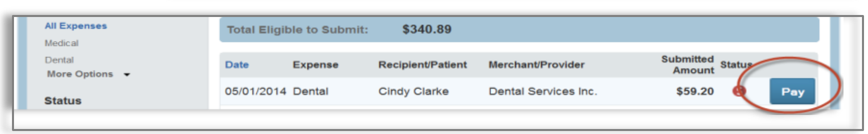
Add an Expense to the Dashboard

- From the **Dashboard** click on the **Add Expense** button in the upper left side of the page.
- Complete the expense detail fields. You can also upload a copy of the receipt and add notes for your records.
- Once the expense has been added to the dashboard, you will have the option to pay the expense.





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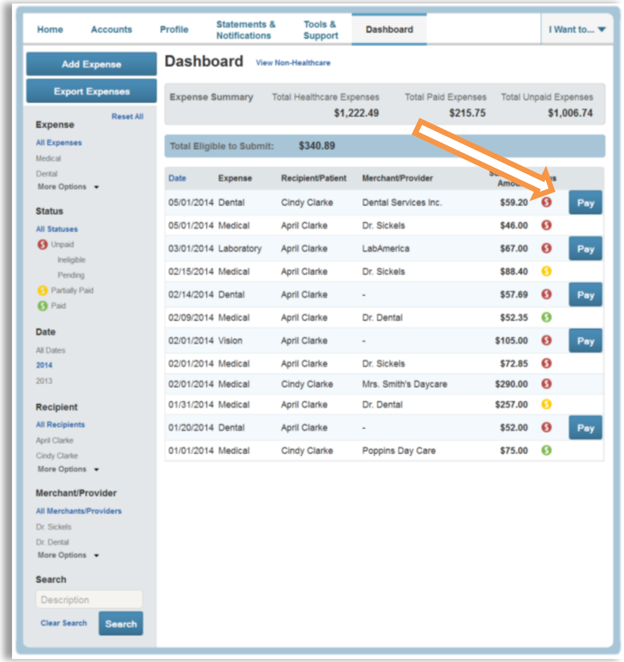
Pay an Expense from the Dashboard

1. You may process payments/reimbursements for unpaid expenses directly from the **Dashboard** page.
2. Expenses will be categorized and payments can be initiated for unpaid expenses by clicking on the button to the right of the expense details.
3. Choose the expenses you would like pay and select the appropriate account to pay the expense.
4. When you click **Pay,** the claim details from the **Dashboard** will be pre-populated within the claim form. Review and edit the claim details as needed and then submit for processing.



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View My Payment History

- From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.
- By clicking on the line of a payment, you can expand the data to display additional details about the transaction.

Access Plan Information

- On the **Home Page**, under the **Accounts** tab, you will be directed to the **Account Summary** page.
- Click the applicable account name and the **Plan Rules** will open in a pop-up window.
- **OR** from the **Home Page**, under the **Tools & Support** tab, you may view **Plan Summaries** for basic information. Click each applicable plan to see the plan details.
- The **Statements & Notifications** tab allows you to access your **Receipt Reminders**, **Account Statements**, **Advice of Deposits**, **Denial Letters**, and **Repayment Letters.**

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BeneFLEX HR Mobile

BeneFlexHR Mobile App

Available for all iPhones, iPads, and Android devices. Download at iTunes or Google Play.

- Submit claims
- Check account balances
- Track healthcare expenses
- Upload pictures of receipts
- Receive text alerts.

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Customer Service

- **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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