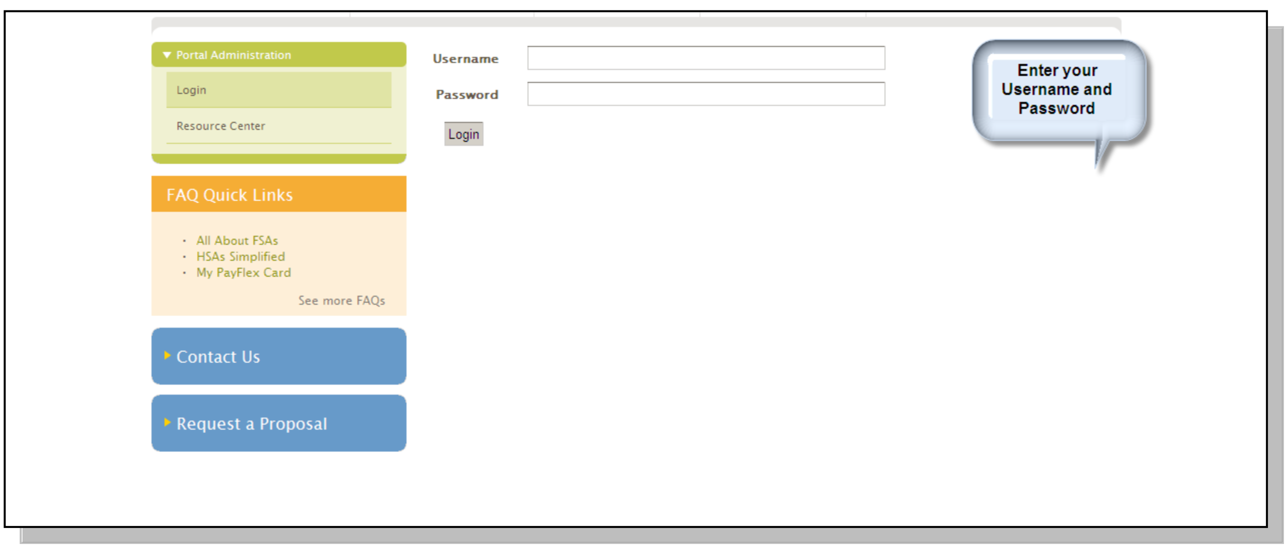
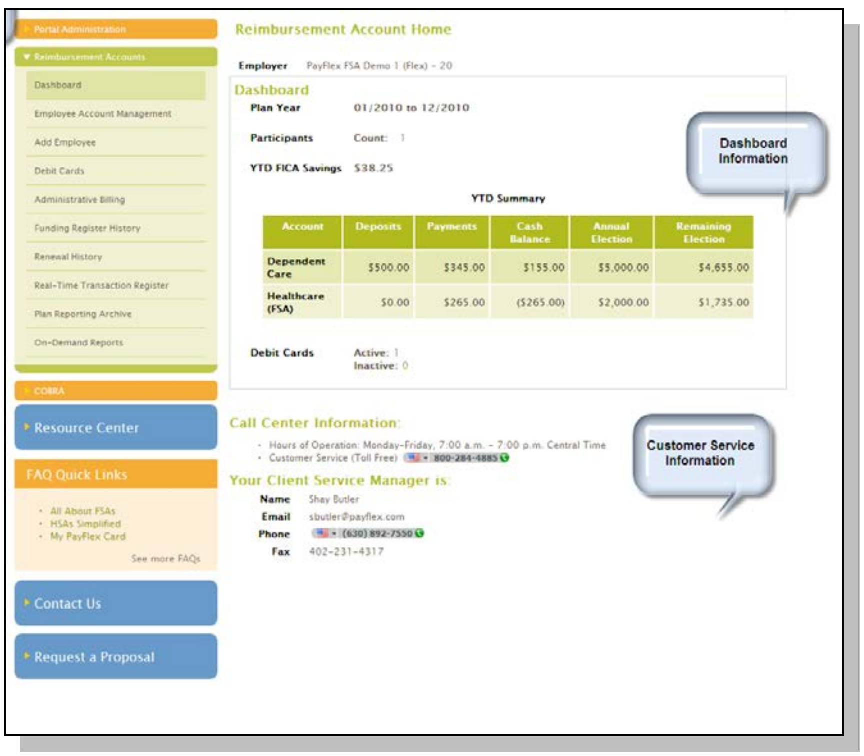
PayFlex®
Reimbursement Account
Employer Web Portal Guide
Updated August, 2012

PRESENTED BY:

We offer an Employer Portal. You can access the web portal through www.payflexdirect.com/employer. Once you log in to the portal you can access your program information in a secure manner.



Upon login, the Employer Portal Dashboard will display. From the Dashboard, you can view a summary of your program information; manage portal access for your users; view employee data; and access and download reports. You can expand or collapse each section of the left navigational panel. From there you can link to Portal Administration, Reimbursement Account, COBRA, Direct Billing, Resources and more. The view below shows the expansion of the Reimbursement Account navigational panel.



Reimbursement Account Dashboard Information

On the Dashboard, you can view summary program data. This includes totals for deposits, payments, cash balances, annual elections and remaining elections. You can also view a list of all employees in the plan. You can see who has an active debit card and who is inactive. You would just click on the linked numbers as circled below.

Customer Service Information

Dashboard

Plan Year 01/2010 to 12/2010

Participants Count: 1

YTD FICA Savings $38.25

YTD Summary

Account	Deposits	Payments	Cash Balance	Annual Election	Remaining Election
Dependent Care	$500.00	$345.00	$155.00	$5,000.00	$4,655.00
Healthcare (FSA)	$0.00	$265.00	($265.00)	$2,000.00	$1,735.00

Debit Cards Active: 1
Inactive: 0

You can also find the Call Center hours and your Client Service Manager's contact information on the Dashboard.

Call Center Information:

- Hours of Operation: Monday-Friday, 7:00 a.m. – 7:00 p.m. Central Time
- Customer Service (Toll Free) 800-284-4885

Your Client Service Manager is:

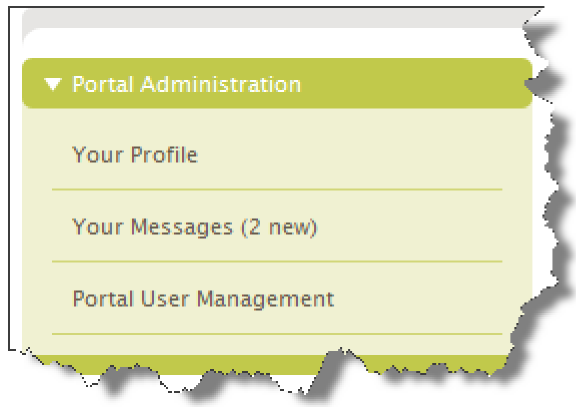
Name	Shay Butler
Email	sbutler@payflex.com
Phone	(630) 892-7550
Fax	402-231-4317

Portal Administration Navigational Options

Using the left navigational panel, you can access the portal administration functions based on your assigned User Roles.

- Update your profile
- View messages
- Add or update users and set their roles

Section 3 of this guide describes these Portal Administration Activities.



Reimbursement Account Navigational Options

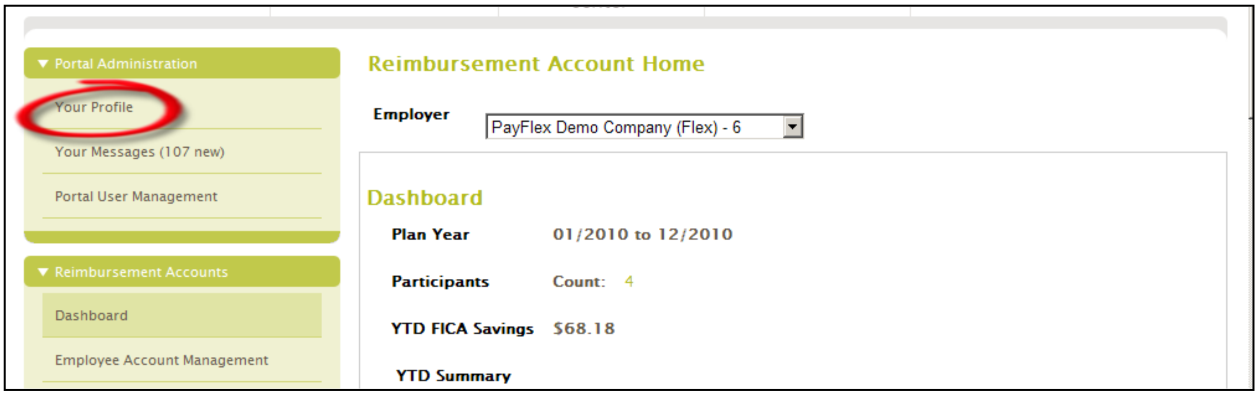
Using the left navigational panel, you can:

- Access employee data
- Add a new employee to the plan*
- View debit card information
- Get reports
  - > Billing
  - > Historical funding
  - > Archived plan information
  - > Real-time funding
- Request an on-demand report
- Access plan-year renewal information

Section 4 of this guide describes these Reimbursement Account Activities.

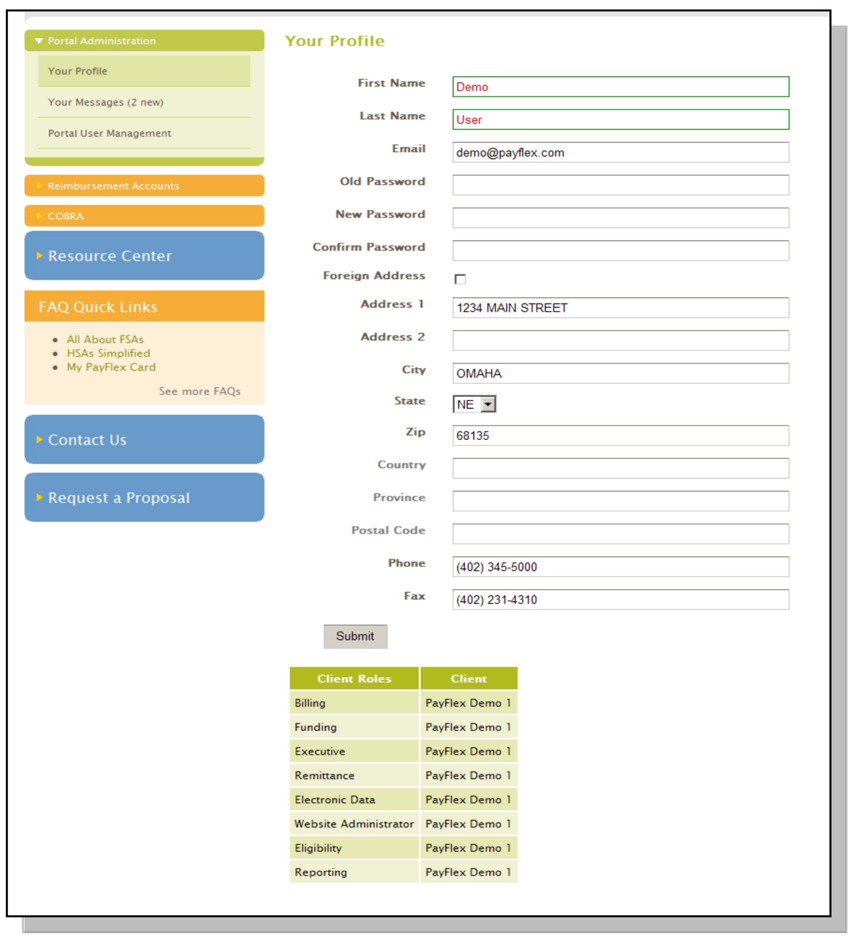
* This is only for clients who do not send in files.

To access the Portal Administration, use the options on the left navigational panel. **Your Profile** is the first option, shown below.



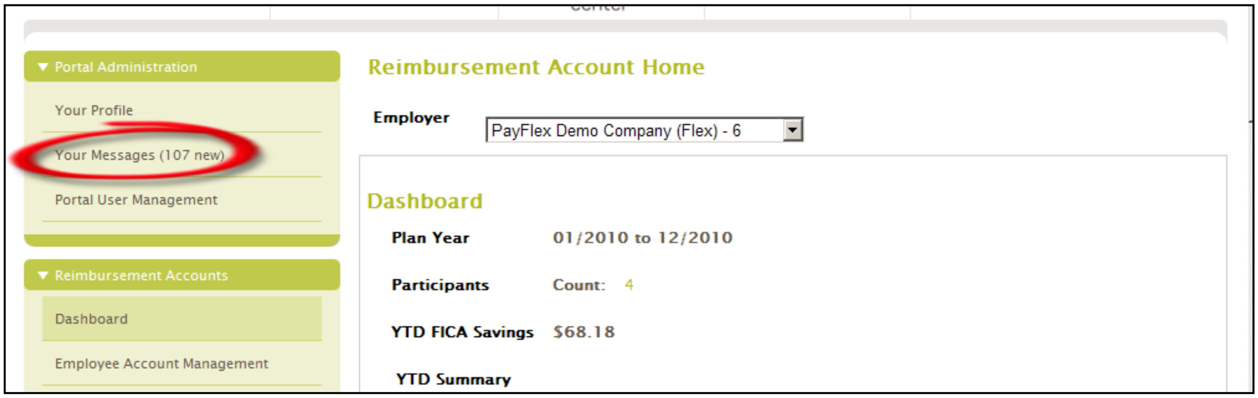
Your Profile

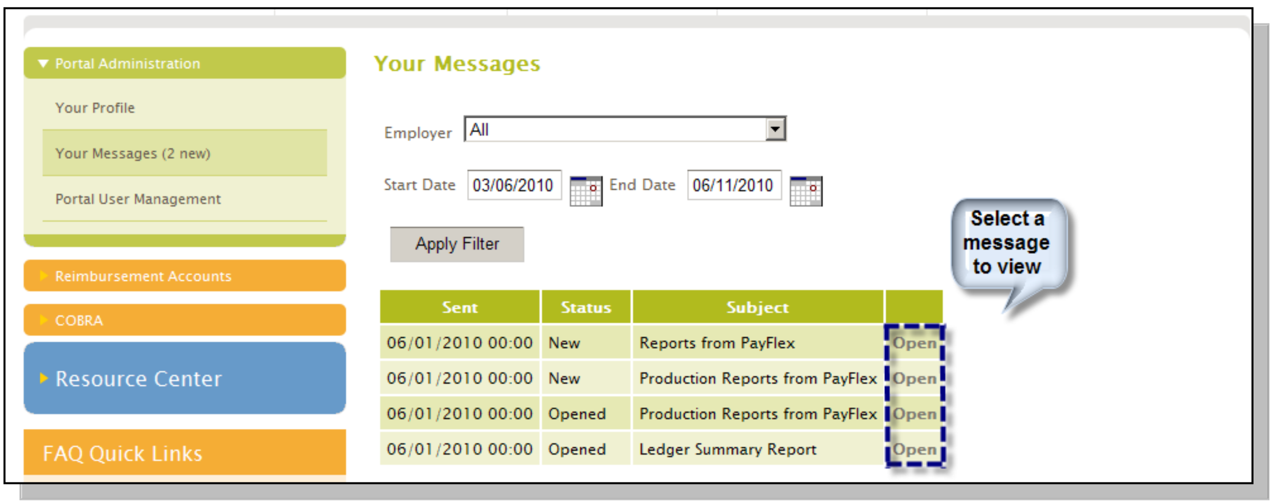
When you select the "**Your Profile**" option on the left navigational panel, **Your Profile** displays. From here, you can update your login credentials and demographic information. You may also view your assigned User Roles.



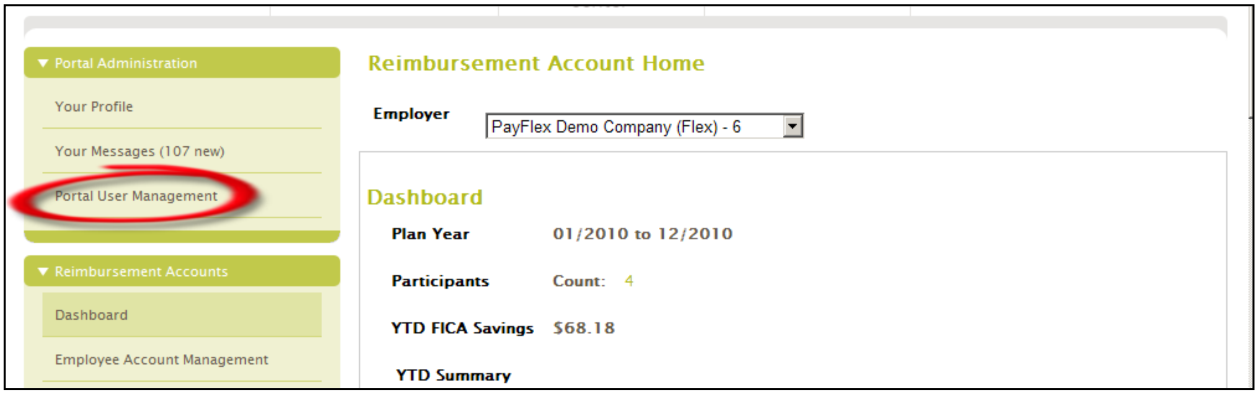
Your Messages

When you select "**Your Messages**" on the left navigational panel, the **Your Messages** view displays. This view displays all archived e-mail messages that our system has sent to you. From here, you can select any message for view.





Portal User Management



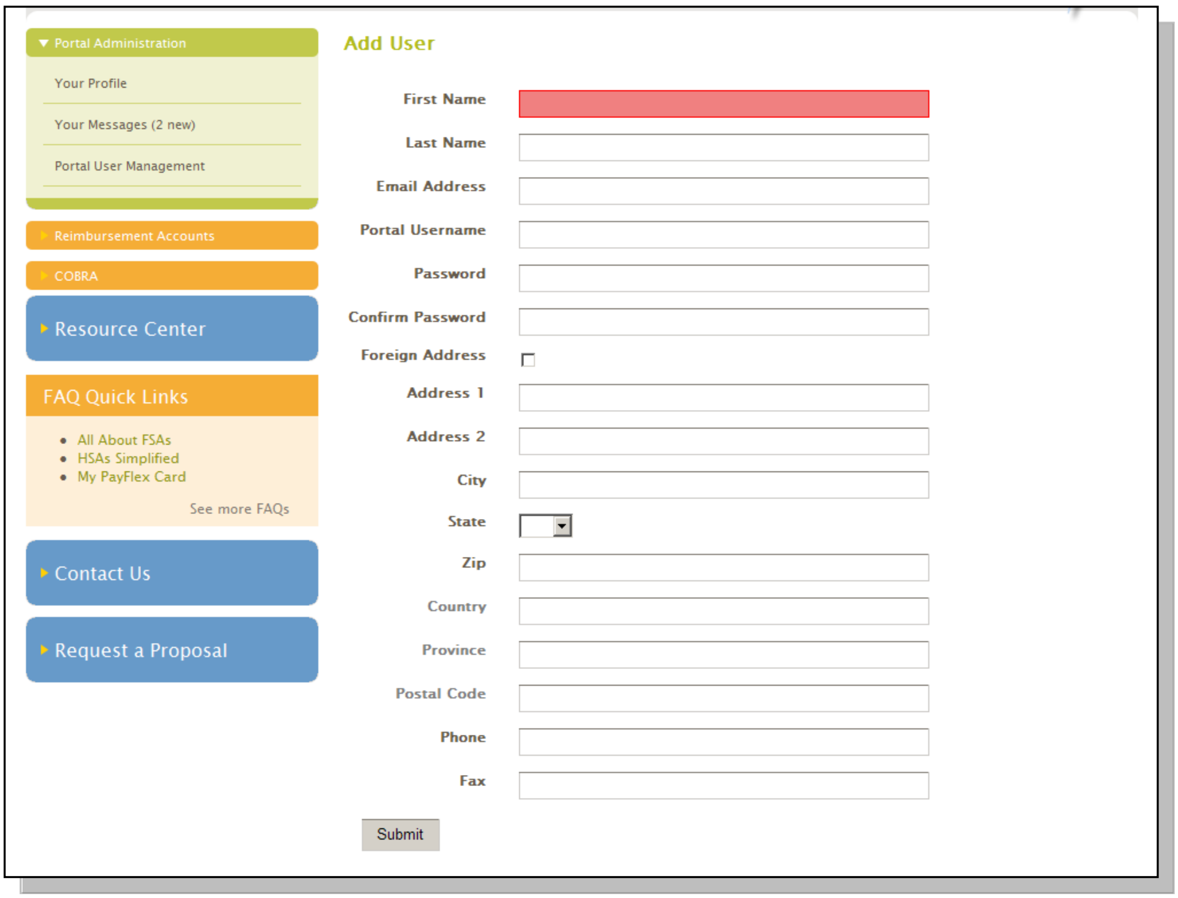
If you are a System Administrator and you select "**Portal User Management**" on the left navigational panel, the **User Maintenance** view displays. Here, you will see a list of all your employer web portal users.

- You can view and update information for any user by clicking on the user's name.
- You can click on "**Add a User**" to establish a new user and select User Roles.

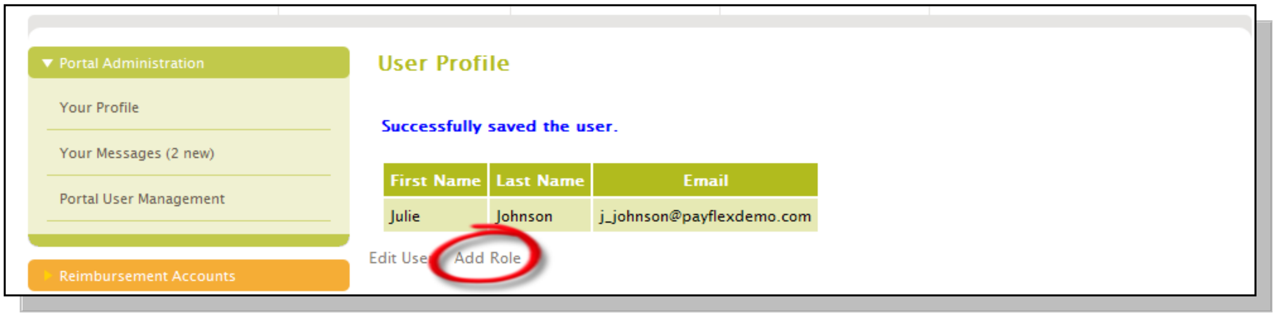
Add a User

Select this option to add a new employer portal User. You will establish the User Role and associated access levels.

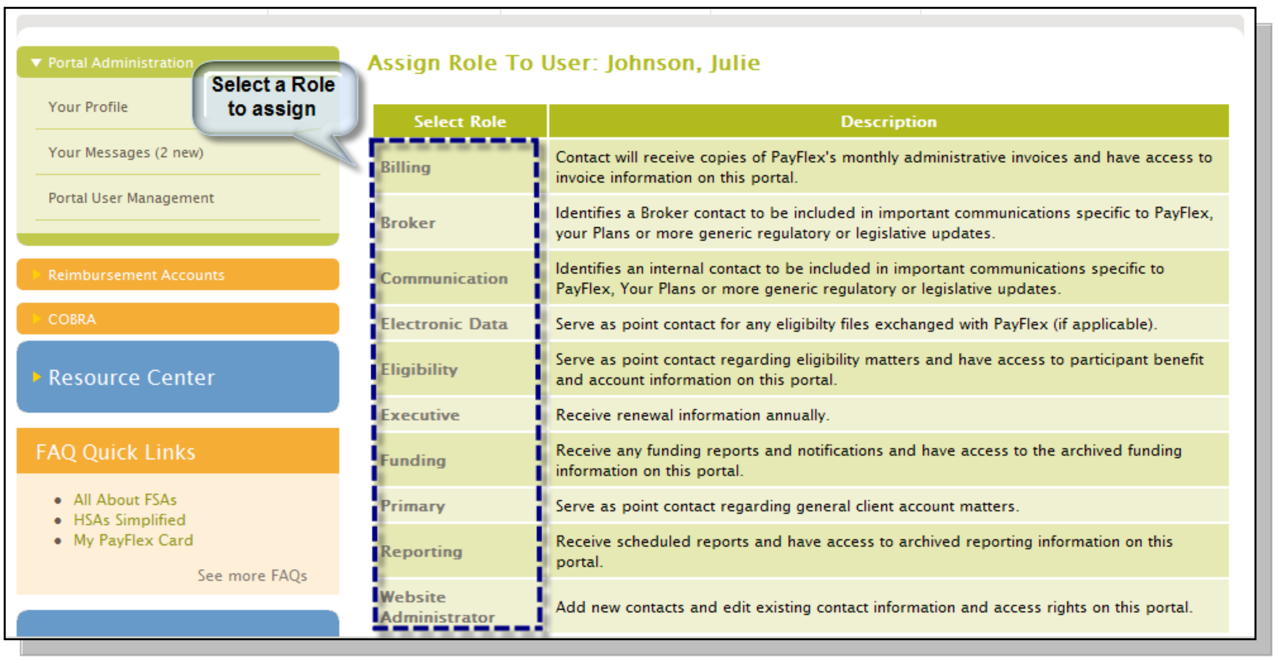
Step One: Enter the user's information.



Step Two: Select "Add a Role" to establish roles for this user.

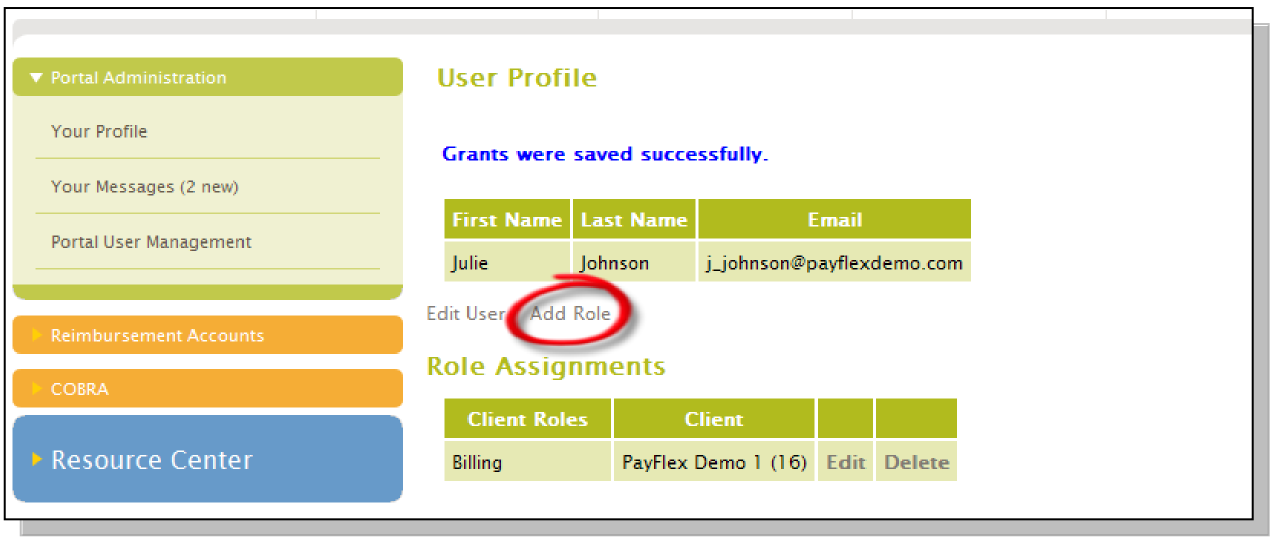


Step Three: Select the user's role.



Step Four: Identify the level of access for this user and click "**Submit**."

This role is now in the system. To add additional roles and access levels for this user, select "**Add a Role.**"



View and Update an Existing User

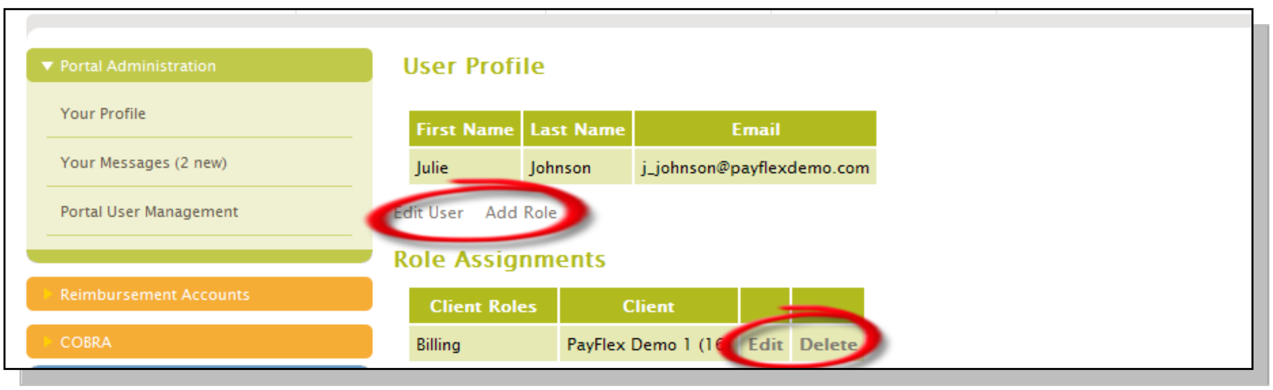
When you click on any User's name, the User's profile and current role assignments will display. From here, you may edit or delete the User or associated Role.

User Profile options:

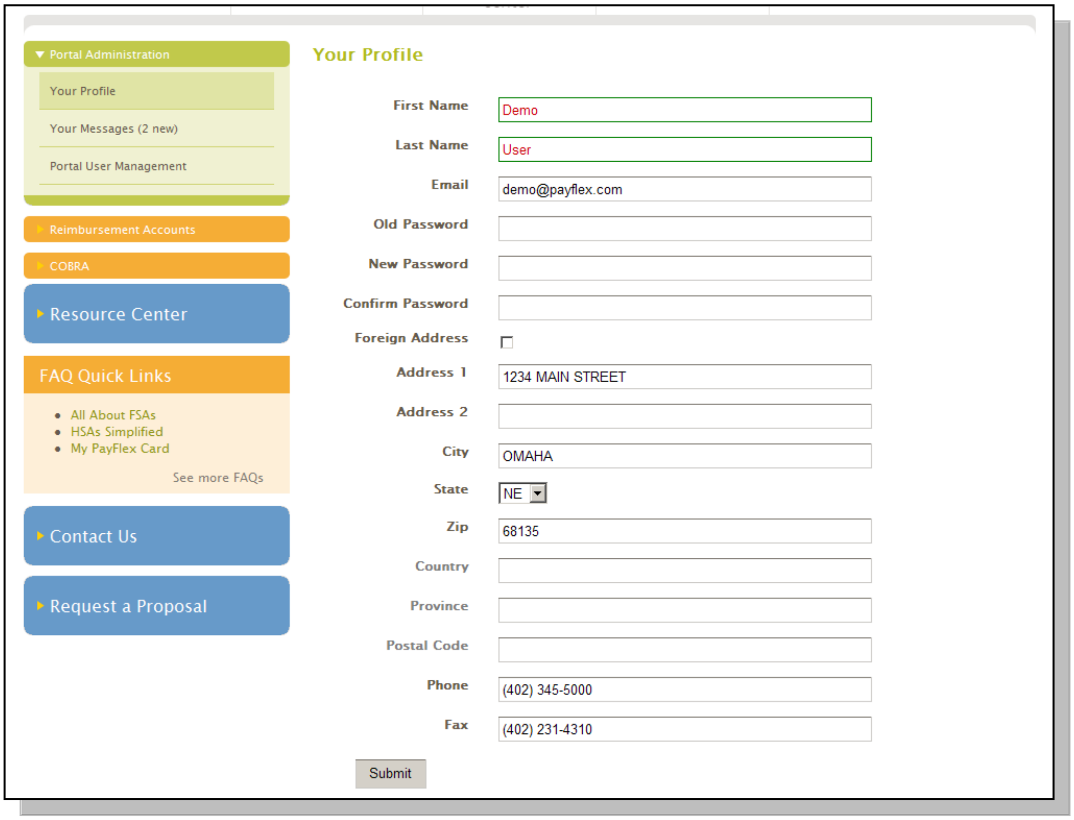
- Click on "**Edit User**" to update the record.
- Click on "**Add Role**" to add a new User Role.

Role Assignments options:

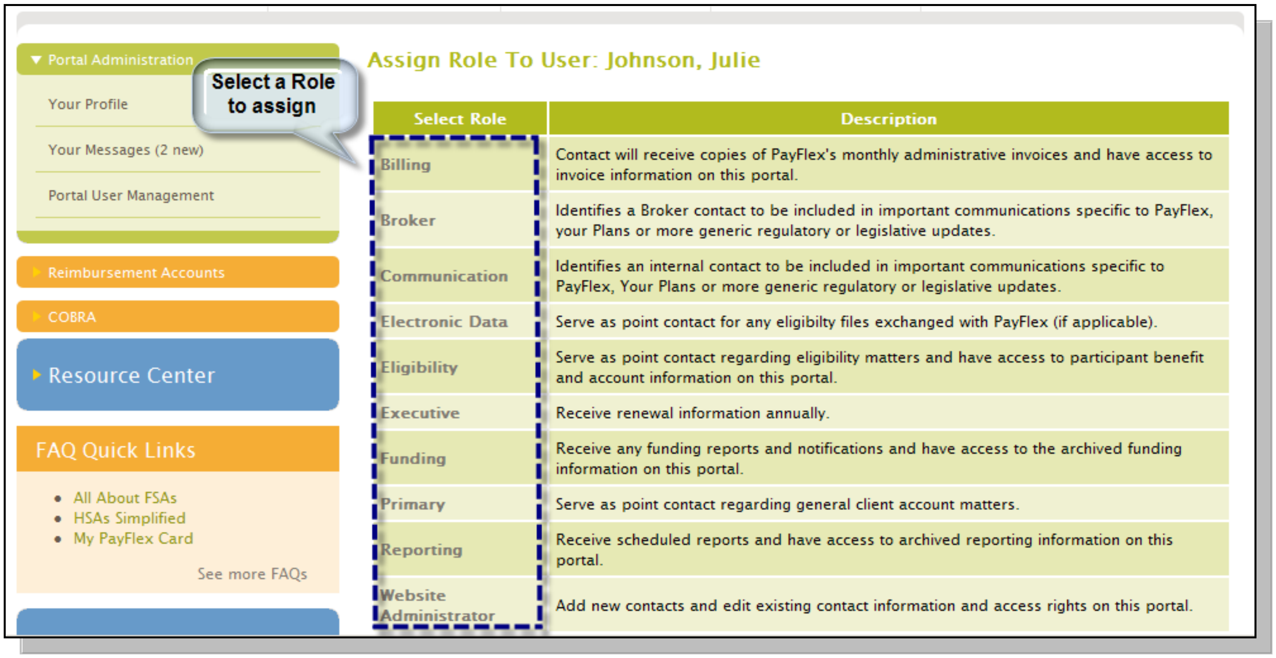
- Click on "**Edit**" to update Role Assignments.
- Click on "**Delete**" to remove a Role Assignment.



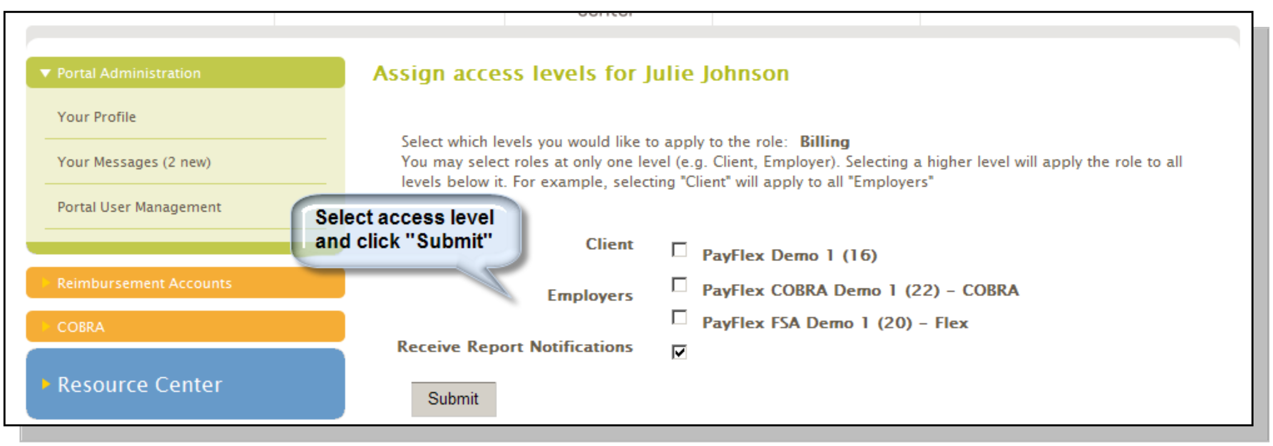
Edit User


Portal Administration
Your Profile
Your Messages (2 new)
Portal User Management
Reimbursement Accounts
COBRA
Resource Center
FAQ Quick Links
All About FSAs
HSAs Simplified
My PayFlex Card
See more FAQs
Contact Us
Request a Proposal
Your Profile
First Name
Demo
Last Name
User
Email
demo@payflex.com
Old Password
New Password
Confirm Password
Foreign Address
Address 1
1234 MAIN STREET
Address 2
City
OMAHA
State
NE
Zip
68135
Country
Province
Postal Code
Phone
(402) 345-5000
Fax
(402) 231-4310
Submit

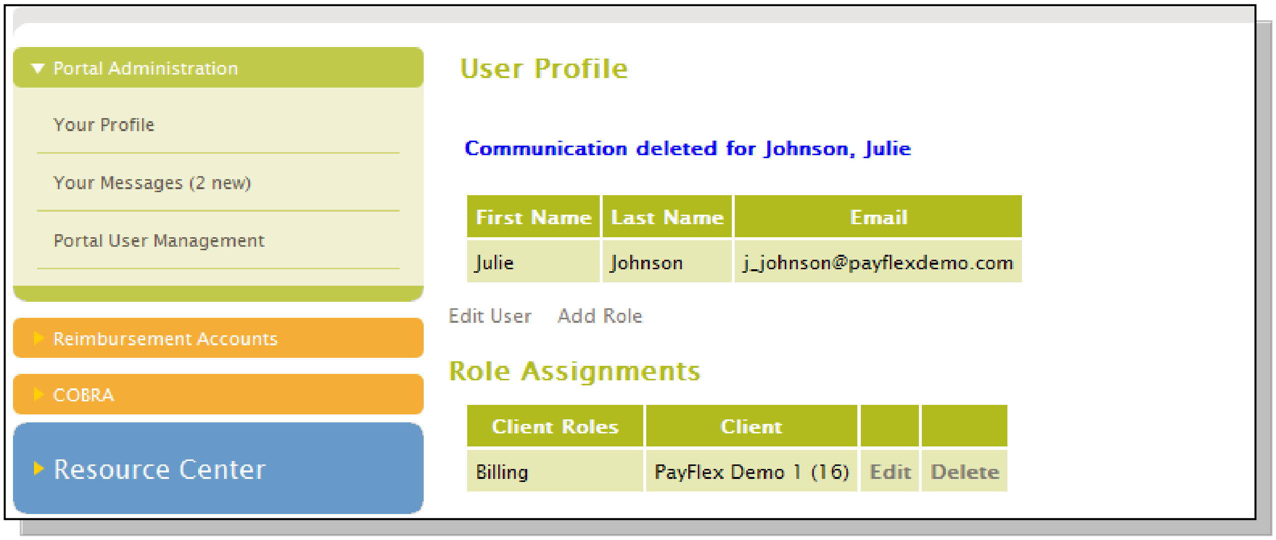
Add a Role



Edit a Role (determines level of access for this user)

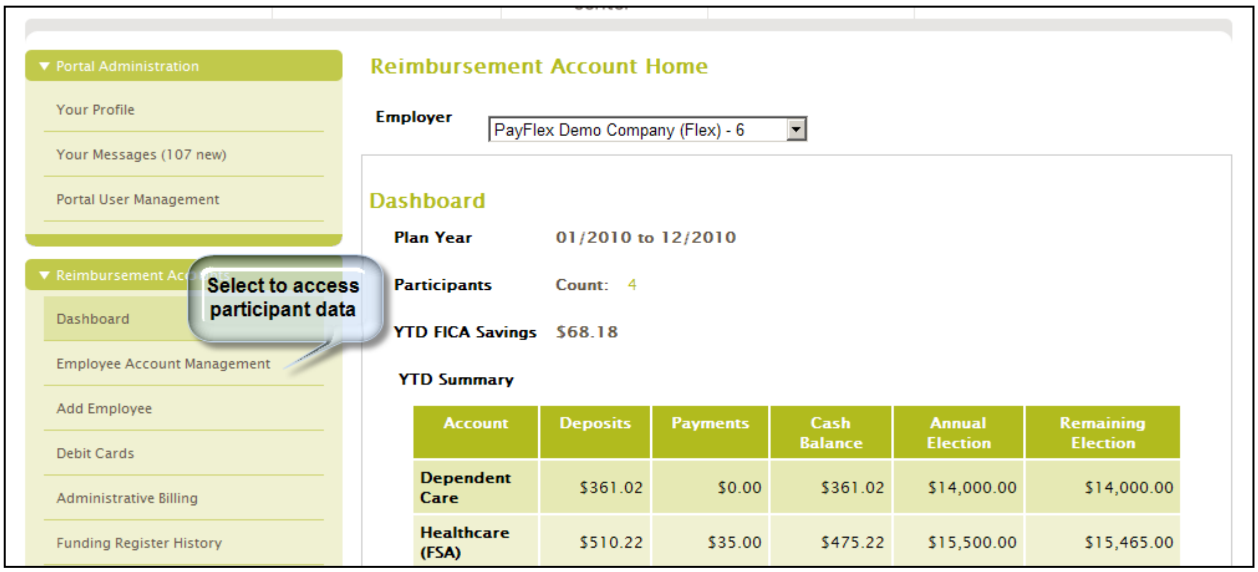


Delete a Role

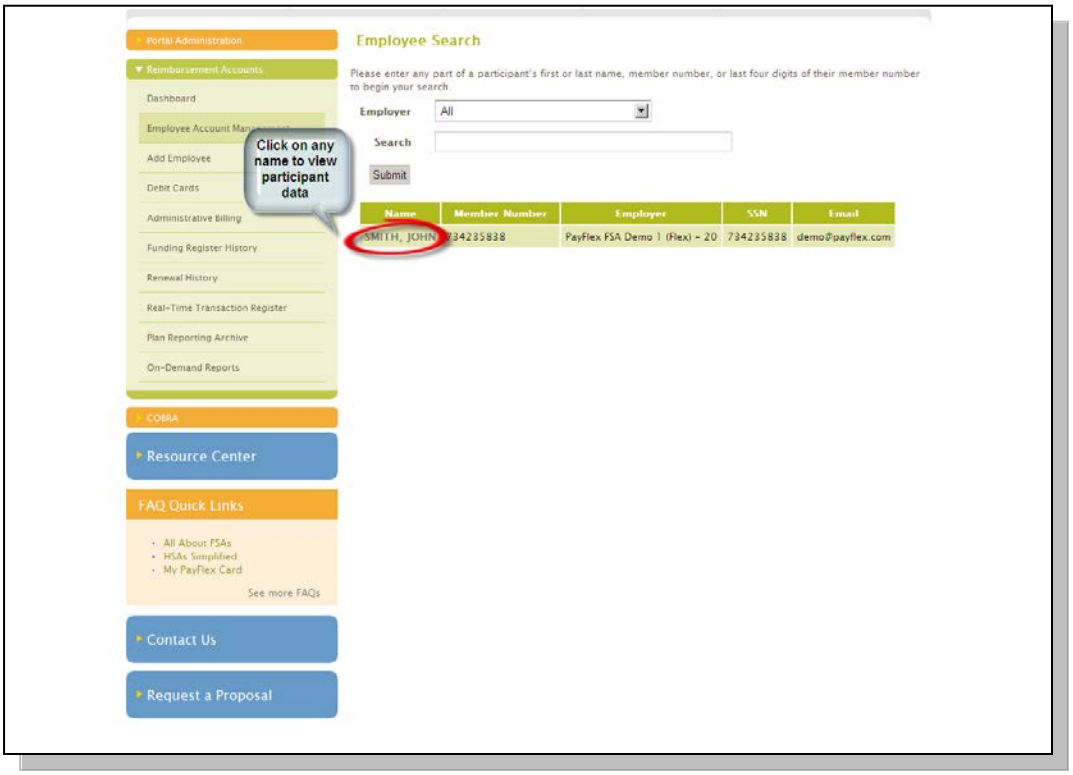


Employee Account Management

Access Employee Account Management functions by selecting this option from the left navigational panel. The **Employee Search** view (shown on the next page) displays.

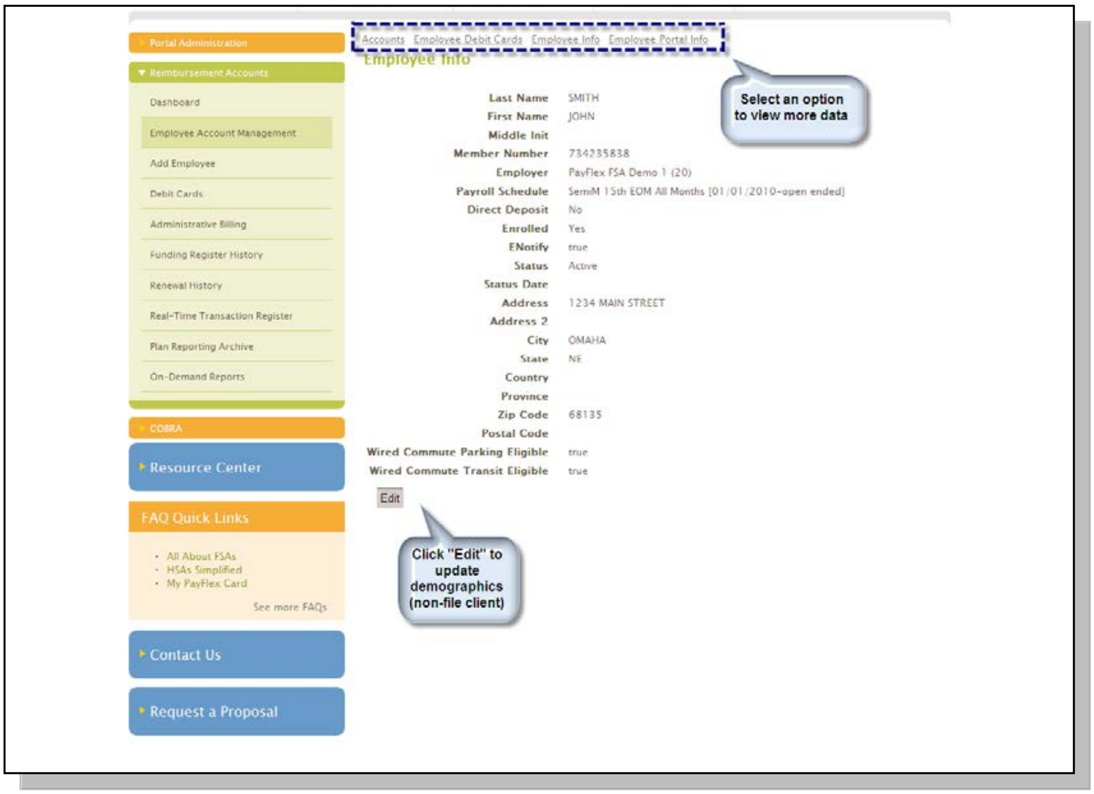


From this view you can view a list of all employees in the plan. You can also select a specific employee and view detailed account information.



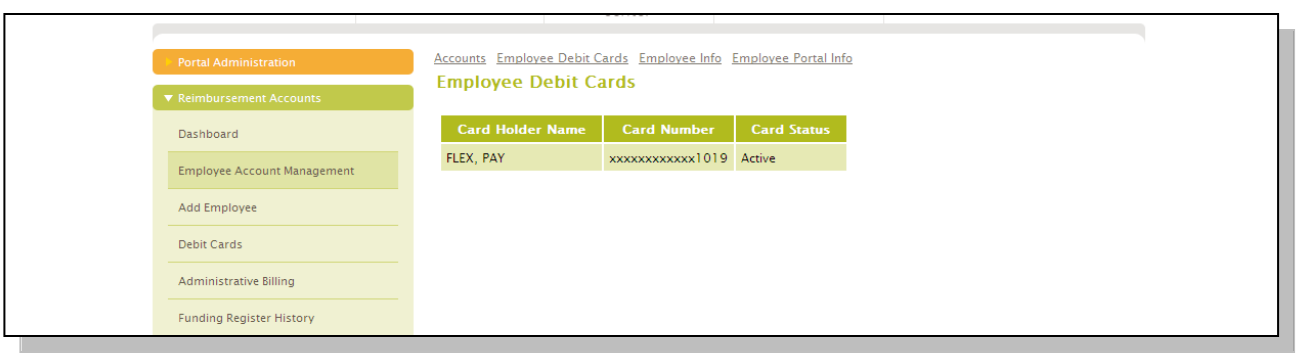
Accessing Employee Data

When you select a specific employee the **Employee Info** view displays. From here, you can see information on that employee's account, debit card and web portal status by selecting one of the links at the top of the display. You can also view demographic information. If you are a non-file feed client, you can update that information online.



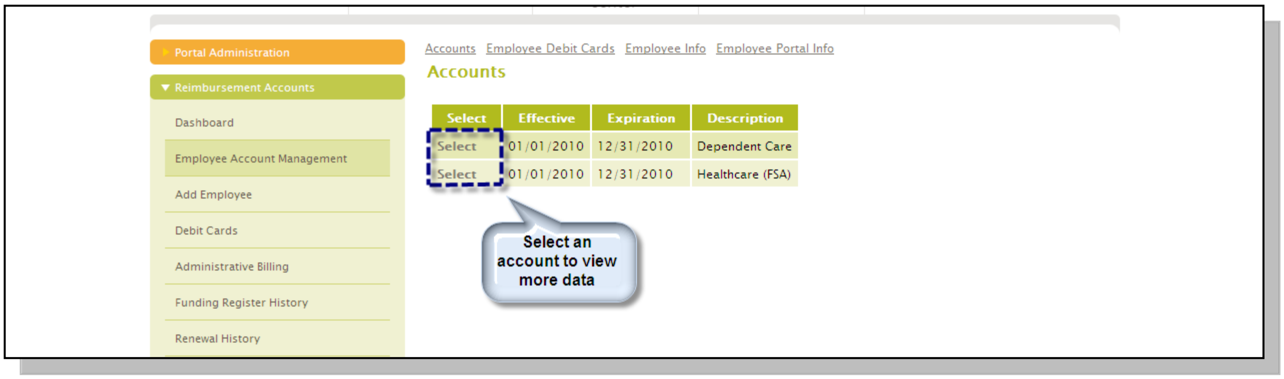
Employee Debit Cards View

When you select the **Employee Debit Cards** view you can see a list of employee debit cards.



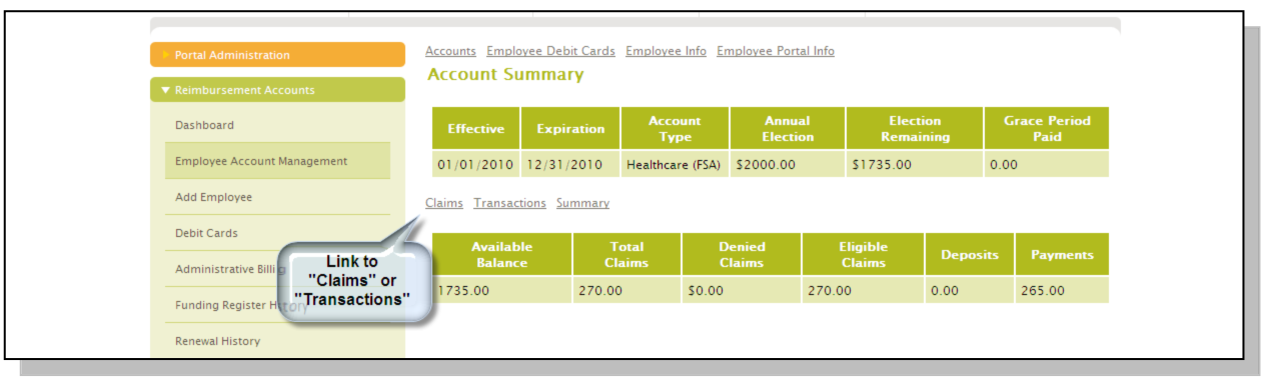
Accounts View

When you select the **Accounts** view you can see a list of accounts. You may select any account to drill down into additional information. This includes claims and transaction history.



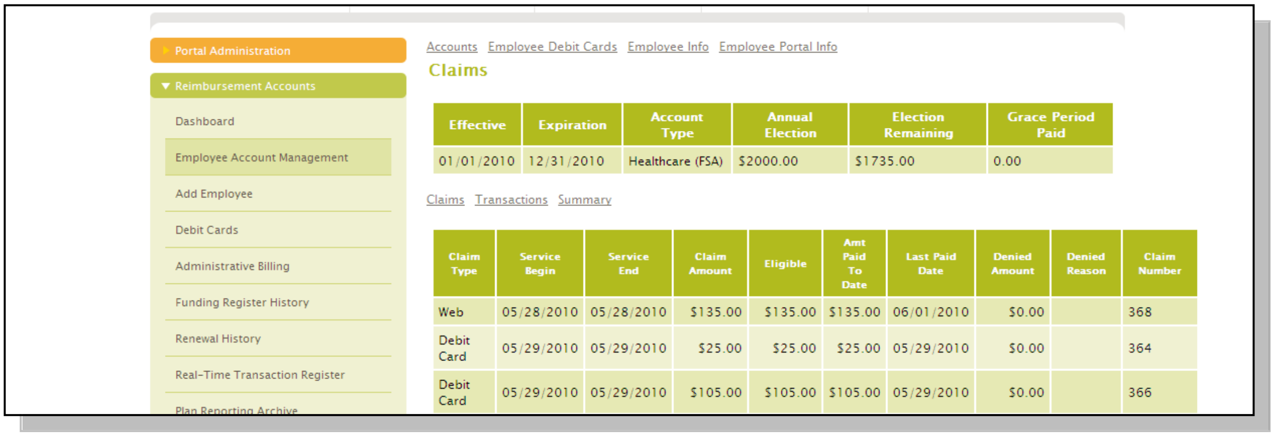
Account Summary View

When you select an account from the Accounts View an **Account Summary** displays. You may click on “Claims” or “Transactions” to view account activity information.



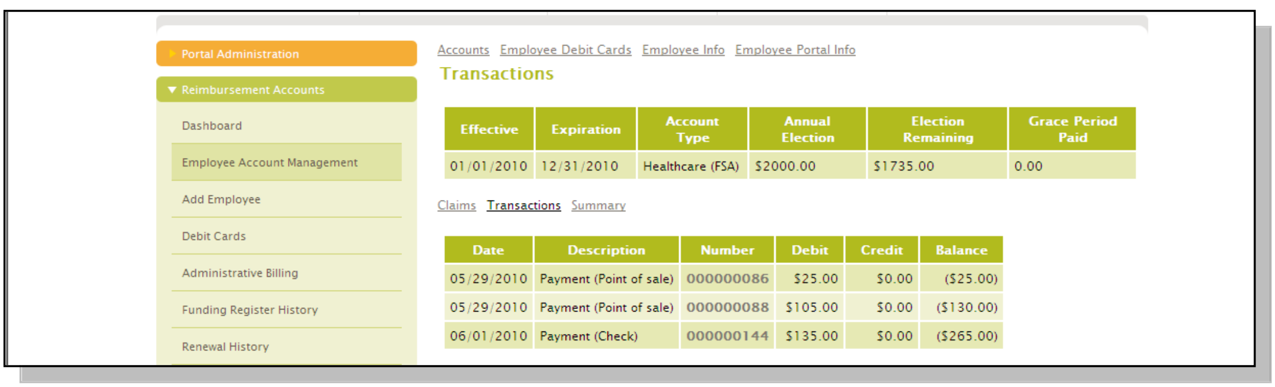
Claims View

When you select "Claims" from the Account Summary view, the **Claims** view displays.



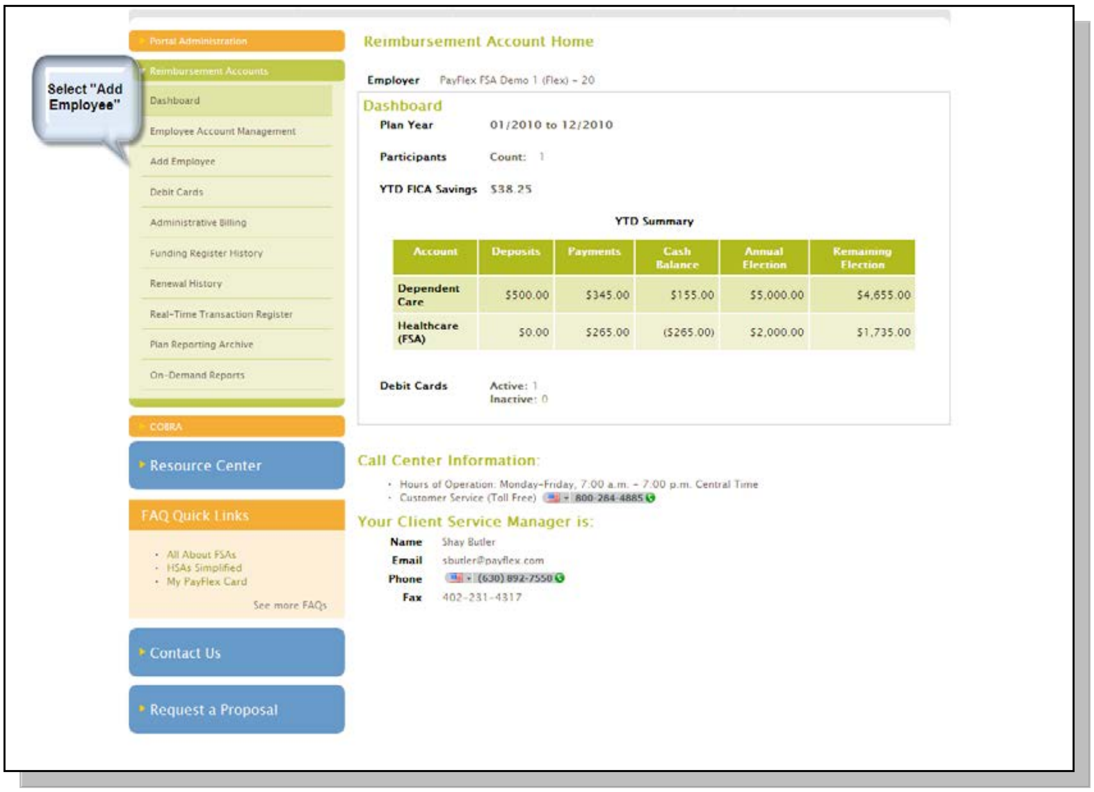
Transactions View

When you select "Transactions" from the Account Summary view, the **Transactions** view displays.

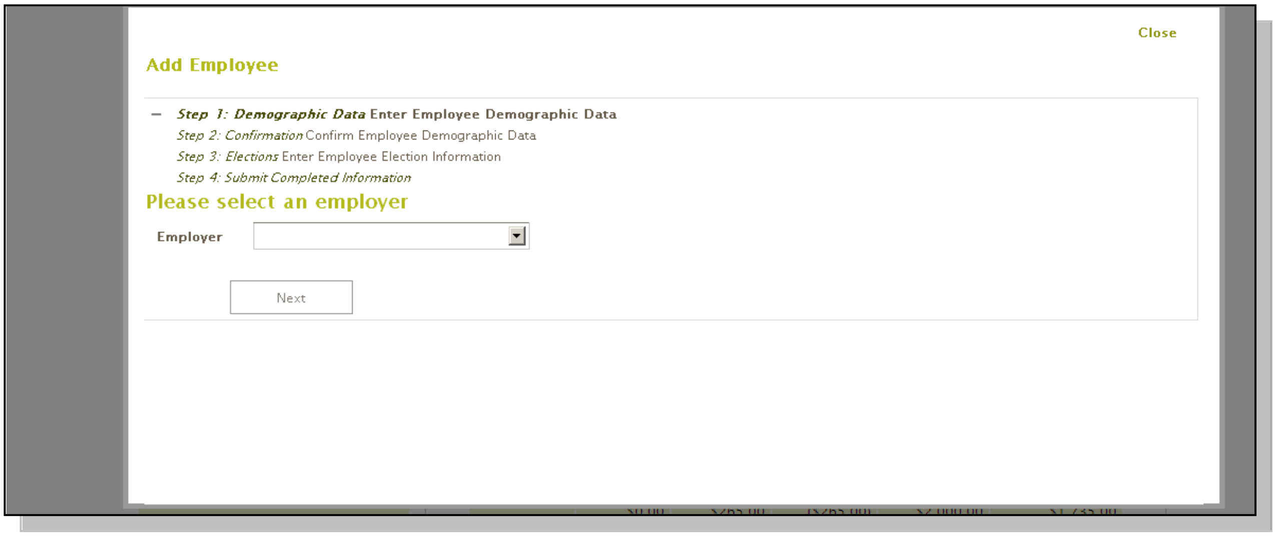


Add an Employee

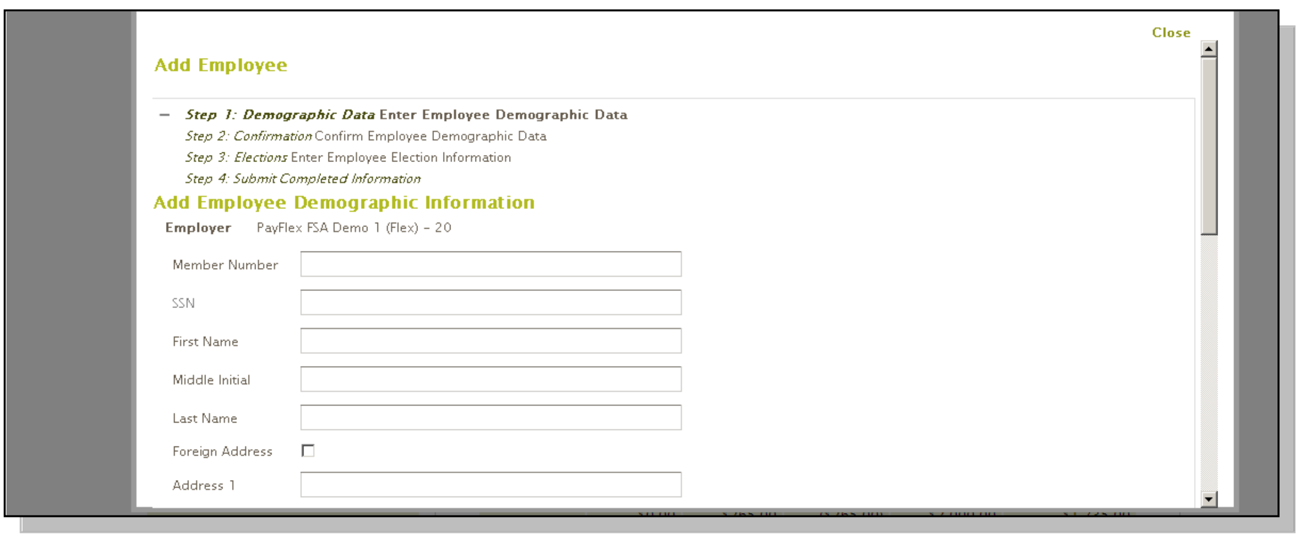
If you are a non-file feed client, you can use the employer web portal to add employees to the plan. Select “Add Employee” from the left navigational panel to perform this action. An online wizard will take you through the process.



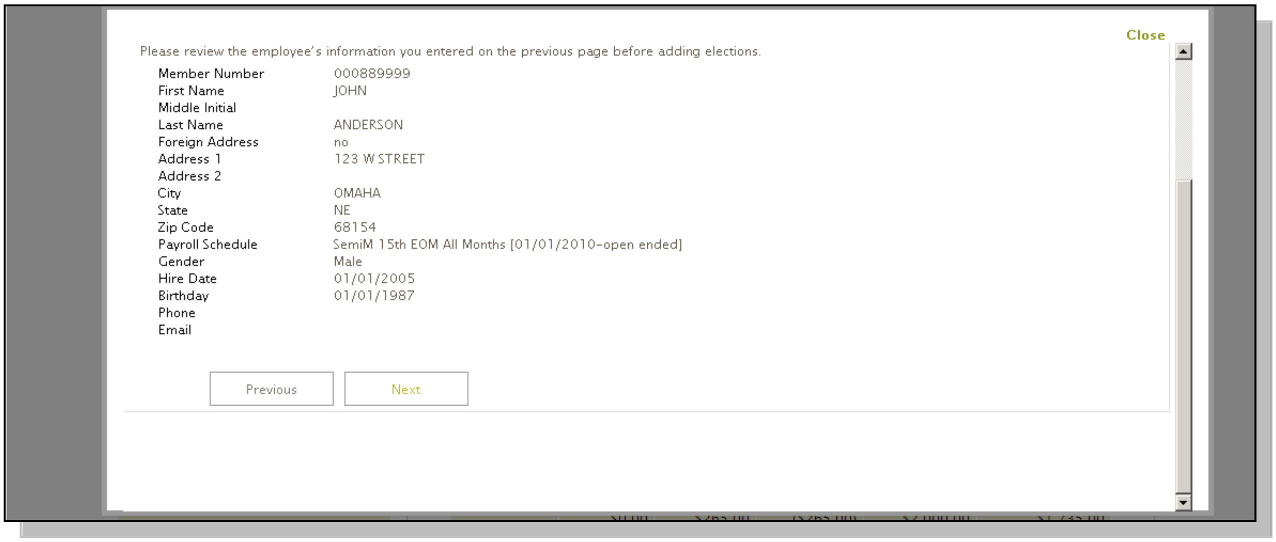
Select an Employer (if required)



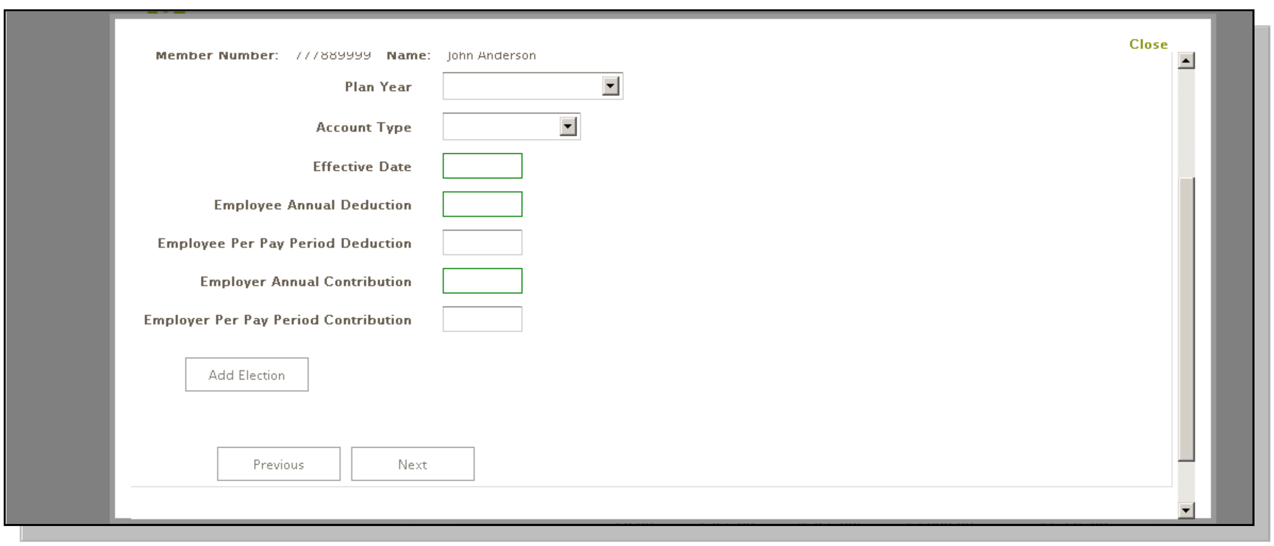
Step One: Add Employee Demographic Information.



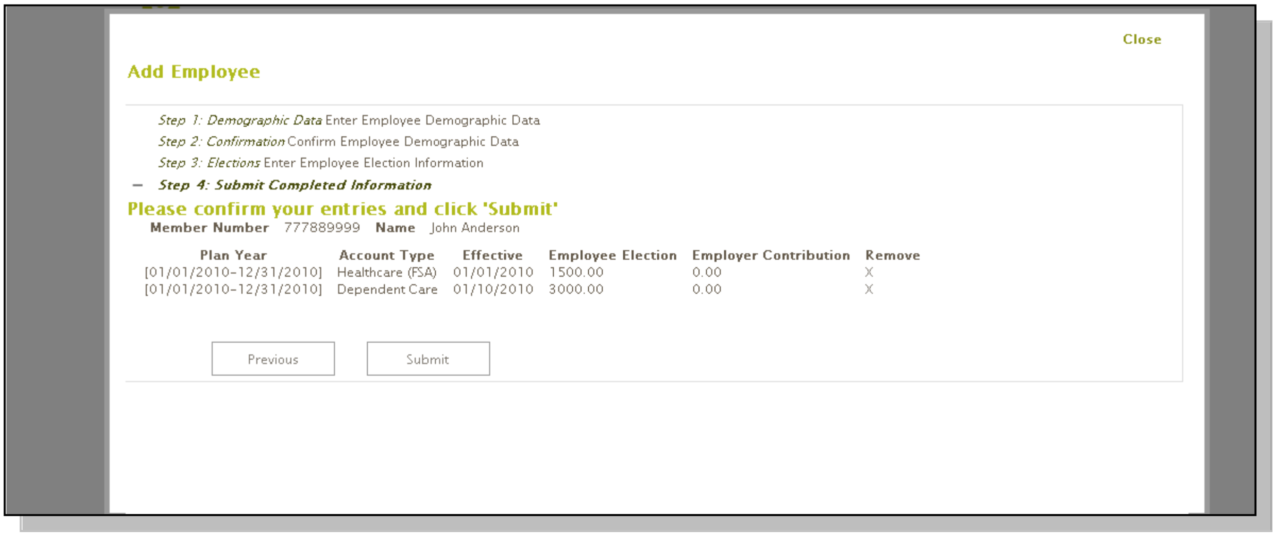
Step Two: Confirm Demographic Information.



Step Three: Add Elections for Each Account Type.



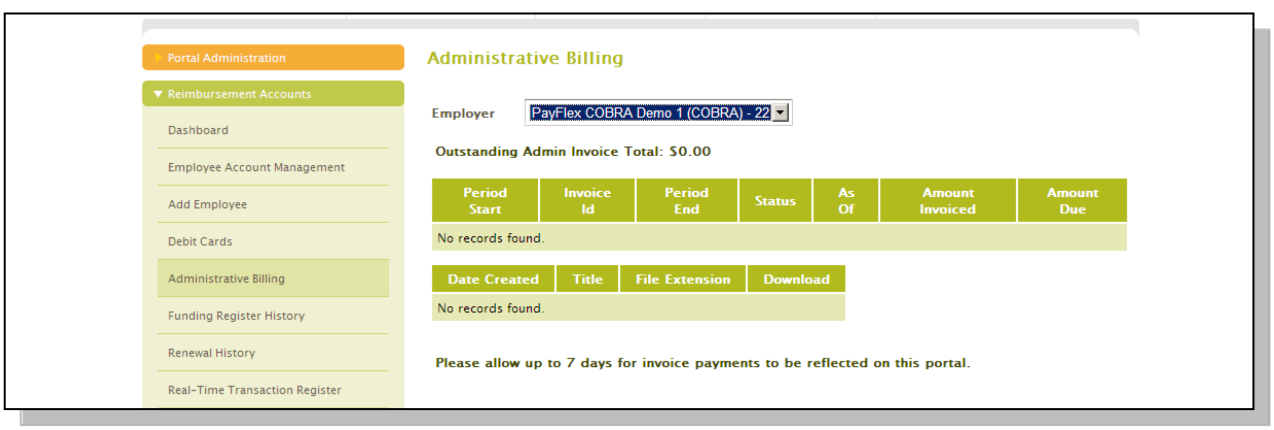
Step Four: Confirm Entries and Submit.



Reports

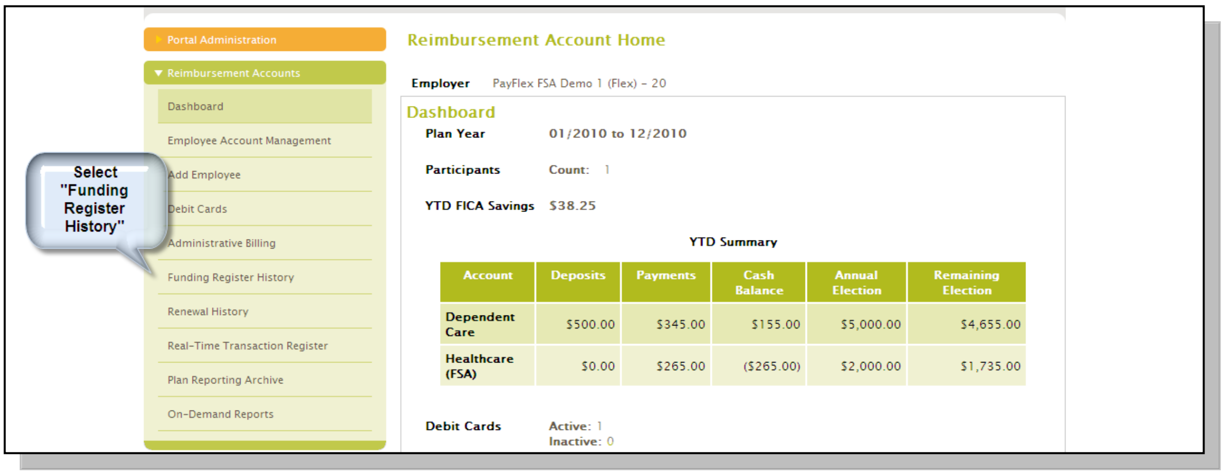
You can view and download reports from the employer web portal. You can view most reports in two different formats – CSV or PDF. You may also print or download a report.

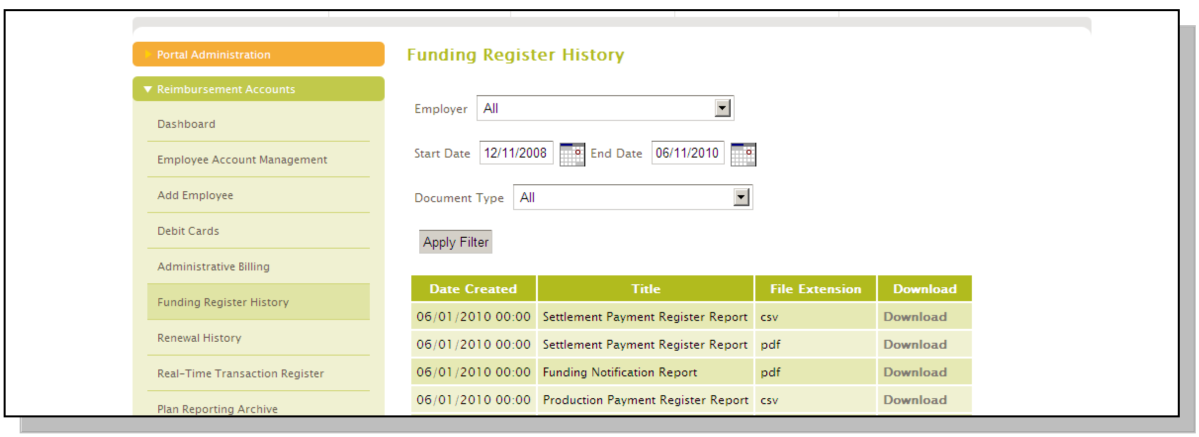
To view a copy of your administration fees invoice, select "Administrative Billing" from the left navigational panel.



Funding Register Reports

To view your funding history for claim activity, select "Funding Register History" from the left navigational panel.

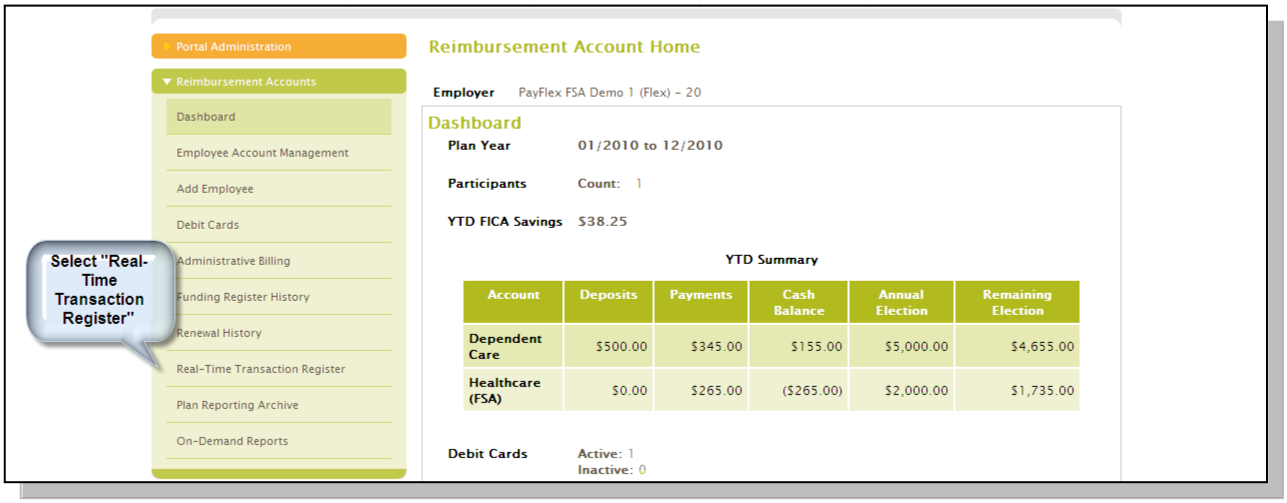


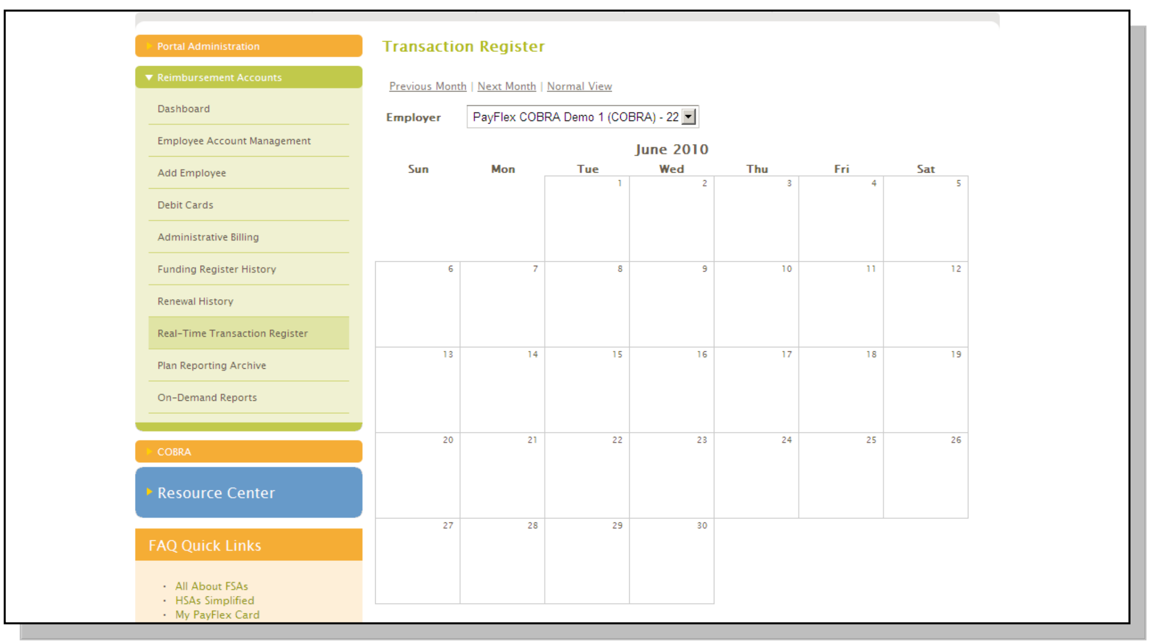


Real-Time Transaction Register

You can view daily funding requirements. You can see this for the current period or view the historical requests. Select "Real-Time Transaction Register" from the left navigational panel.

Link to any report by selecting the amount displayed on the funding calendar.





On-Demand Reports

In addition to the reports that we provide, you can also run reports “on-demand.” Select “On Demand Reports” from the left navigational panel.

Identify the report and format you want and press “Submit.” The requested report will automatically load to the web portal.