

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

PRESENTED BY:



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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.



▼ Portal Administration

- Login
- Resource Center

FAQ Quick Links

- All About FSAs
- HSAs Simplified
- My PayFlex Card

See more FAQs

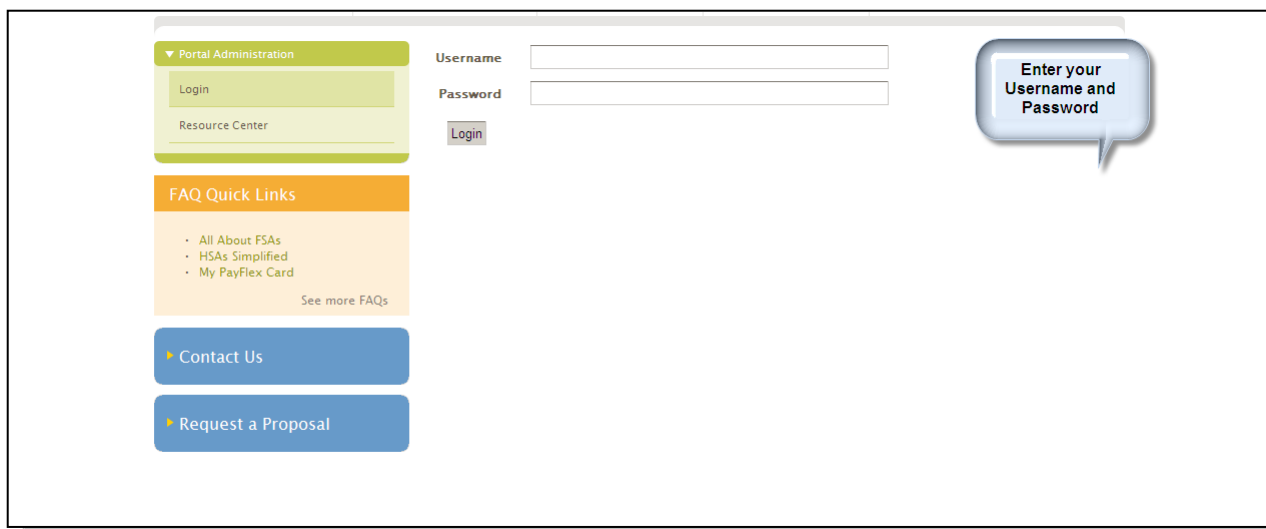
▶ Contact Us

▶ Request a Proposal

Welcome To Our Online Employer Center

Our Employer Center is designed to help you manage your PayFlex programs, communicate plan information to your employees, plan your open enrollment meetings and access industry news.

You can also preview our innovative products and services designed to educate, engage and empower your employees---all created to provide a return on your investment in your employees' health.



▼ Portal Administration

- Login
- Resource Center

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- My PayFlex Card

See more FAQs

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Username

Password

Login

Enter your Username and Password

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.

Portal Administration

- Reimbursement Accounts
 - Dashboard
 - Employee Account Management
 - Add Employee
 - Debit Cards
 - Administrative Billing
 - Funding Register History
 - Renewal History
 - Real-Time Transaction Register
 - Plan Reporting Archive
 - On-Demand Reports
- COBRA
- Resource Center
- FAQ Quick Links
 - All About FSAs
 - HSAs Simplified
 - My PayFlex Card
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- Contact Us
- Request a Proposal

Reimbursement Account Home

Employer: PayFlex FSA Demo 1 (Flex) - 20

Dashboard

Plan Year: 01/2010 to 12/2010

Participants: Count: 1

YTD FICA Savings: \$88.25

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

Call Center Information:

- Hours of Operation: Monday-Friday, 7:00 a.m. - 7:00 p.m. Central Time
- Customer Service (Toll Free): 800-289-1885

Your Client Service Manager is:

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

Dashboard Information

Customer Service Information

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](tel:800-284-4885) 

Your Client Service Manager is:

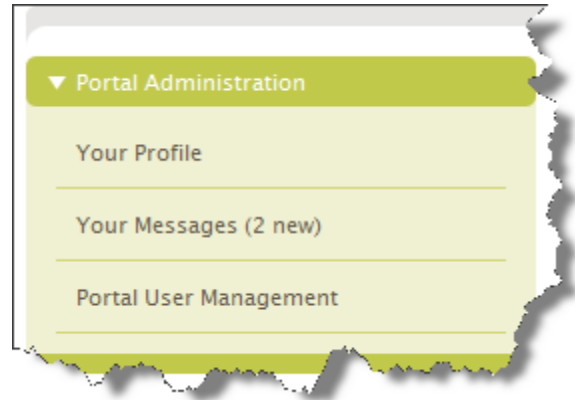
Name Shay Butler
Email sbutler@payflex.com
Phone  [\(630\) 892-7550](tel:(630)892-7550) 
Fax 402-231-4317

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



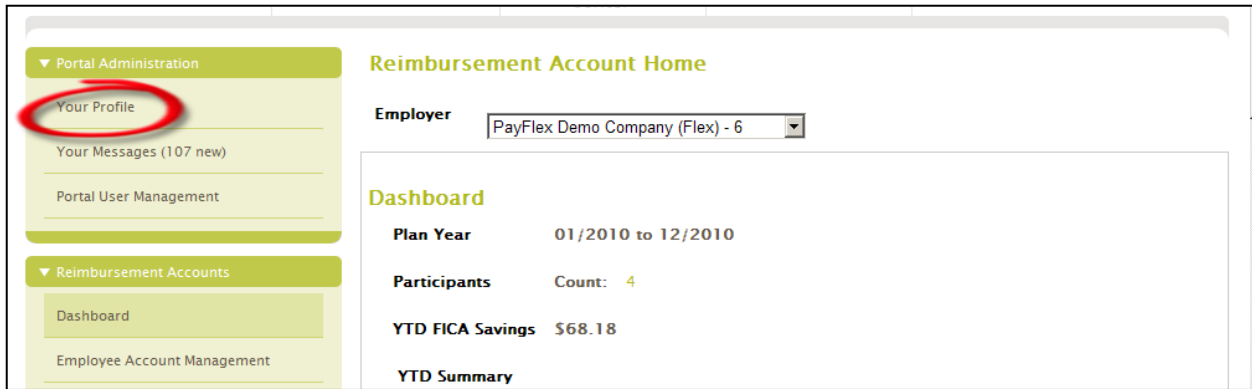
Using the left navigational panel, you can:

- 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.

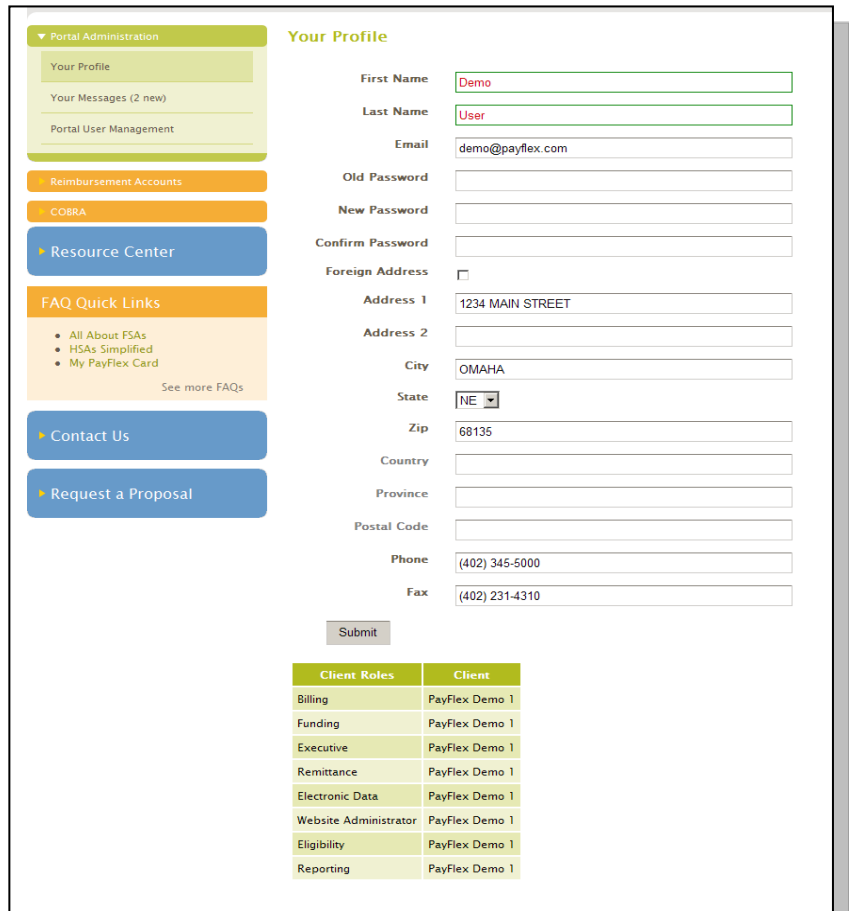
* This is only for clients who do not send in files.

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.

Reimbursement Account Home

Employer: PayFlex Demo Company (Flex) - 6

Dashboard

Plan Year: 01/2010 to 12/2010

Participants Count: 4

YTD FICA Savings: \$68.18

YTD Summary

Your Messages

Employer: All

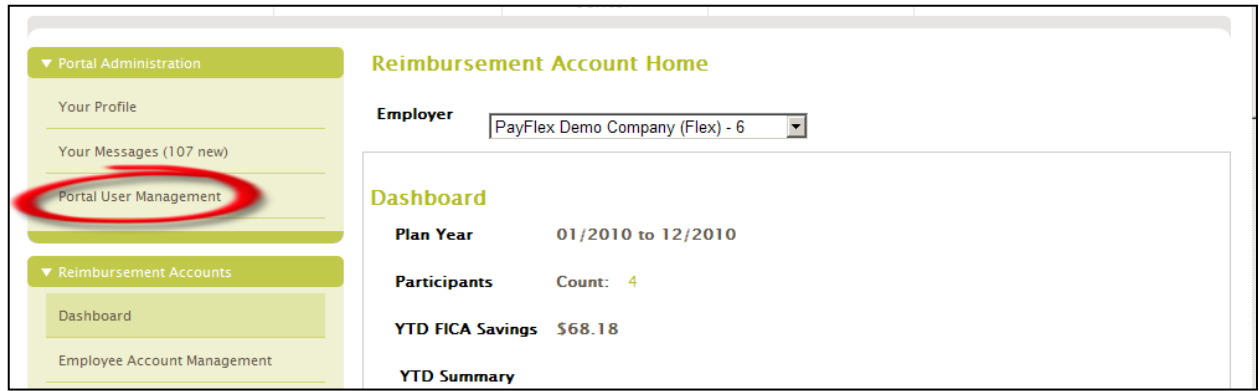
Start Date: 03/06/2010 End Date: 06/11/2010

Apply Filter

Sent	Status	Subject	
06/01/2010 00:00	New	Reports from PayFlex	Open
06/01/2010 00:00	New	Production Reports from PayFlex	Open
06/01/2010 00:00	Opened	Production Reports from PayFlex	Open
06/01/2010 00:00	Opened	Ledger Summary Report	Open

Select a message to 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.

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

Add User

First Name

Last Name

Email Address

Portal Username

Password

Confirm Password

Foreign Address

Address 1

Address 2

City

State

Zip

Country

Province

Postal Code

Phone

Fax

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

User Profile

Successfully saved the user.

First Name	Last Name	Email
Julie	Johnson	j_johnson@payflexdemo.com

Edit User **Add Role**

Step Three: Select the user’s role.

Assign Role To User: Johnson, Julie

Select Role	Description
Billing	Contact will receive copies of PayFlex's monthly administrative invoices and have access to invoice information on this portal.
Broker	Identifies a Broker contact to be included in important communications specific to PayFlex, your Plans or more generic regulatory or legislative updates.
Communication	Identifies an internal contact to be included in important communications specific to PayFlex, Your Plans or more generic regulatory or legislative updates.
Electronic Data	Serve as point contact for any eligibilty files exchanged with PayFlex (if applicable).
Eligibility	Serve as point contact regarding eligibility matters and have access to participant benefit and account information on this portal.
Executive	Receive renewal information annually.
Funding	Receive any funding reports and notifications and have access to the archived funding information on this portal.
Primary	Serve as point contact regarding general client account matters.
Reporting	Receive scheduled reports and have access to archived reporting information on this portal.
Website Administrator	Add new contacts and edit existing contact information and access rights on this portal.

Select a Role to assign

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

Assign access levels for Julie Johnson

Select which levels you would like to apply to the role: **Billing**
You may select roles at only one level (e.g. Client, Employer). Selecting a higher level will apply the role to all levels below it. For example, selecting "Client" will apply to all "Employers"

Client PayFlex Demo 1 (16)

Employers PayFlex COBRA Demo 1 (22) - COBRA
 PayFlex FSA Demo 1 (20) - Flex

Receive Report Notifications

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

User Profile

Grants were saved successfully.

First Name	Last Name	Email
Julie	Johnson	j_johnson@payflexdemo.com

Edit User [Add Role](#)

Role Assignments

Client Roles	Client		
Billing	PayFlex Demo 1 (16)	Edit	Delete

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.

The screenshot shows a web interface for user management. On the left is a navigation sidebar with 'Portal Administration' expanded, containing 'Your Profile', 'Your Messages (2 new)', and 'Portal User Management'. Below this are 'Reimbursement Accounts' and 'COBRA' sections. The main content area is titled 'User Profile' and contains a table with columns 'First Name', 'Last Name', and 'Email'. The data row shows 'Julie', 'Johnson', and 'j_johnson@payflexdemo.com'. Below the table are 'Edit User' and 'Add Role' buttons, both circled in red. Below that is the 'Role Assignments' section with a table with columns 'Client Roles', 'Client', and two empty columns. The data row shows 'Billing', 'PayFlex Demo 1 (16)', and 'Edit' and 'Delete' buttons, both circled in red.

First Name	Last Name	Email
Julie	Johnson	j_johnson@payflexdemo.com

[Edit User](#) [Add Role](#)

Client Roles	Client		
Billing	PayFlex Demo 1 (16)	Edit	Delete

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

Last Name

Email

Old Password

New Password

Confirm Password

Foreign Address

Address 1

Address 2

City

State

Zip

Country

Province

Postal Code

Phone

Fax

Add a Role

Assign Role To User: Johnson, Julie

Select a Role to assign

Select Role	Description
Billing	Contact will receive copies of PayFlex's monthly administrative invoices and have access to invoice information on this portal.
Broker	Identifies a Broker contact to be included in important communications specific to PayFlex, your Plans or more generic regulatory or legislative updates.
Communication	Identifies an internal contact to be included in important communications specific to PayFlex, Your Plans or more generic regulatory or legislative updates.
Electronic Data	Serve as point contact for any eligibility files exchanged with PayFlex (if applicable).
Eligibility	Serve as point contact regarding eligibility matters and have access to participant benefit and account information on this portal.
Executive	Receive renewal information annually.
Funding	Receive any funding reports and notifications and have access to the archived funding information on this portal.
Primary	Serve as point contact regarding general client account matters.
Reporting	Receive scheduled reports and have access to archived reporting information on this portal.
Website Administrator	Add new contacts and edit existing contact information and access rights on this portal.

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

Assign access levels for Julie Johnson

Select which levels you would like to apply to the role: **Billing**
 You may select roles at only one level (e.g. Client, Employer). Selecting a higher level will apply the role to all levels below it. For example, selecting "Client" will apply to all "Employers"

Select access level and click "Submit"

Client PayFlex Demo 1 (16)

Employers PayFlex COBRA Demo 1 (22) - COBRA

PayFlex FSA Demo 1 (20) - Flex

Receive Report Notifications

Submit

Delete a Role

▼ Portal Administration

- Your Profile
- Your Messages (2 new)
- Portal User Management

▶ Reimbursement Accounts

▶ COBRA

▶ Resource Center

User Profile

Communication deleted for Johnson, Julie

First Name	Last Name	Email
Julie	Johnson	j_johnson@payflexdemo.com

[Edit User](#) [Add Role](#)

Role Assignments

Client Roles	Client		
Billing	PayFlex Demo 1 (16)	Edit	Delete

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.

Reimbursement Account Home

Employer: PayFlex Demo Company (Flex) - 6

Dashboard

Plan Year: 01/2010 to 12/2010

Participants: Count: 4

YTD FICA Savings: \$68.18

YTD Summary

Account	Deposits	Payments	Cash Balance	Annual Election	Remaining Election
Dependent Care	\$361.02	\$0.00	\$361.02	\$14,000.00	\$14,000.00
Healthcare (FSA)	\$510.22	\$35.00	\$475.22	\$15,500.00	\$15,465.00

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.

The screenshot displays the 'Employee Search' page. On the left is a navigation menu with categories: Portal Administration, Reimbursement Accounts, COBRA, Resource Center, FAQ Quick Links, Contact Us, and Request a Proposal. The main content area includes a search form with an 'Employer' dropdown set to 'All', a search input field, and a 'Submit' button. Below the form is a table with the following data:

Name	Member Number	Employer	SSN	Email
SMITH, JOHN	734235838	PayFlex FSA Demo 1 (Flex) - 20	734235838	demo@payflex.com

A callout bubble points to the 'SMITH, JOHN' entry in the table, containing the text: 'Click on any name to view participant data'. The name 'SMITH, JOHN' is circled in red in the original image.

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.

Accounts Employee Debit Cards Employee Info Employee Portal Info

Employee Info

Last Name SMITH
 First Name JOHN
 Middle Init
 Member Number 734235838
 Employer PayFlex FSA Demo 1 (20)
 Payroll Schedule SemiM 15th EOM All Months [01/01/2010-open ended]
 Direct Deposit No
 Enrolled Yes
 ENotify true
 Status Active
 Status Date
 Address 1234 MAIN STREET
 Address 2
 City OMAHA
 State NE
 Country
 Province
 Zip Code 68135
 Postal Code
 Wired Commute Parking Eligible true
 Wired Commute Transit Eligible true

Edit

Select an option to view more data

Click "Edit" to update demographics (non-file client)

Employee Debit Cards View

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

Accounts Employee Debit Cards Employee Info Employee Portal Info

Employee Debit Cards

Card Holder Name	Card Number	Card Status
FLEX, PAY	xxxxxxxxxxxx1019	Active

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.

Select	Effective	Expiration	Description
Select	01/01/2010	12/31/2010	Dependent Care
Select	01/01/2010	12/31/2010	Healthcare (FSA)

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.

Effective	Expiration	Account Type	Annual Election	Election Remaining	Grace Period Paid
01/01/2010	12/31/2010	Healthcare (FSA)	\$2000.00	\$1735.00	0.00

Available Balance	Total Claims	Denied Claims	Eligible Claims	Deposits	Payments
1735.00	270.00	\$0.00	270.00	0.00	265.00

Claims View

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

Portal Administration

Reimbursement Accounts

- Dashboard
- Employee Account Management
- Add Employee
- Debit Cards
- Administrative Billing
- Funding Register History
- Renewal History
- Real-Time Transaction Register
- Plan Reporting Archive

Accounts Employee Debit Cards Employee Info Employee Portal Info

Claims

Effective	Expiration	Account Type	Annual Election	Election Remaining	Grace Period Paid
01/01/2010	12/31/2010	Healthcare (FSA)	\$2000.00	\$1735.00	0.00

Claims Transactions Summary

Claim Type	Service Begin	Service End	Claim Amount	Eligible	Amt Paid To Date	Last Paid Date	Denied Amount	Denied Reason	Claim Number
Web	05/28/2010	05/28/2010	\$135.00	\$135.00	\$135.00	06/01/2010	\$0.00		368
Debit Card	05/29/2010	05/29/2010	\$25.00	\$25.00	\$25.00	05/29/2010	\$0.00		364
Debit Card	05/29/2010	05/29/2010	\$105.00	\$105.00	\$105.00	05/29/2010	\$0.00		366

Transactions View

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

Portal Administration

Reimbursement Accounts

- Dashboard
- Employee Account Management
- Add Employee
- Debit Cards
- Administrative Billing
- Funding Register History
- Renewal History

Accounts Employee Debit Cards Employee Info Employee Portal Info

Transactions

Effective	Expiration	Account Type	Annual Election	Election Remaining	Grace Period Paid
01/01/2010	12/31/2010	Healthcare (FSA)	\$2000.00	\$1735.00	0.00

Claims Transactions Summary

Date	Description	Number	Debit	Credit	Balance
05/29/2010	Payment (Point of sale)	000000086	\$25.00	\$0.00	(\$25.00)
05/29/2010	Payment (Point of sale)	000000088	\$105.00	\$0.00	(\$130.00)
06/01/2010	Payment (Check)	000000144	\$135.00	\$0.00	(\$265.00)

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 "Add Employee"

Portal Administration

- Reimbursement Accounts
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 - Employee Account Management
 - Add Employee**
 - Debit Cards
 - Administrative Billing
 - Funding Register History
 - Renewal History
 - Real-Time Transaction Register
 - Plan Reporting Archive
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- FAQ Quick Links
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 - HSAs Simplified
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- Contact Us
- Request a Proposal

Reimbursement Account Home

Employer: PayFlex FSA Demo 1 (Flex) - 20

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

Call Center Information:

- Hours of Operation: Monday-Friday, 7:00 a.m. - 7:00 p.m. Central Time
- Customer Service (Toll Free): [800-264-4885](tel:800-264-4885)

Your Client Service Manager is:

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

Select an Employer (if required)

This screenshot shows the 'Add Employee' form at the 'Please select an employer' step. The form includes a progress indicator with four steps: Step 1: Demographic Data (Enter Employee Demographic Data), Step 2: Confirmation (Confirm Employee Demographic Data), Step 3: Elections (Enter Employee Election Information), and Step 4: Submit Completed Information. Below the progress indicator, the text 'Please select an employer' is displayed. An 'Employer' dropdown menu is present, and a 'Next' button is located below it. A 'Close' button is visible in the top right corner of the form area.

Step One: Add Employee Demographic Information.

This screenshot shows the 'Add Employee' form at the 'Add Employee Demographic Information' step. The form includes the same progress indicator as the previous screenshot. Below the progress indicator, the text 'Add Employee Demographic Information' is displayed. The 'Employer' field is populated with 'PayFlex FSA Demo 1 (Flex) - 20'. Below this, there are input fields for 'Member Number', 'SSN', 'First Name', 'Middle Initial', and 'Last Name'. There is also a checkbox for 'Foreign Address' and an 'Address 1' input field. A vertical scrollbar is visible on the right side of the form area, and a 'Close' button is in the top right corner.

Step Two: Confirm Demographic Information.

Please review the employee's information you entered on the previous page before adding elections. Close

Member Number	000889999
First Name	JOHN
Middle Initial	
Last Name	ANDERSON
Foreign Address	no
Address 1	123 W STREET
Address 2	
City	OMAHA
State	NE
Zip Code	68154
Payroll Schedule	SemiM 15th EOM All Months [01/01/2010--open ended]
Gender	Male
Hire Date	01/01/2005
Birthdate	01/01/1987
Phone	
Email	

Step Three: Add Elections for Each Account Type.

Member Number: // /889999 Name: John Anderson Close

Plan Year

Account Type

Effective Date

Employee Annual Deduction

Employee Per Pay Period Deduction

Employer Annual Contribution

Employer Per Pay Period Contribution

Step Four: Confirm Entries and Submit.

[Close](#)

Add Employee

Step 1: Demographic Data Enter Employee Demographic Data
Step 2: Confirmation Confirm Employee Demographic Data
Step 3: Elections Enter Employee Election Information
— **Step 4: Submit Completed Information**

Please confirm your entries and click 'Submit'

Member Number 777889999 **Name** John Anderson

Plan Year	Account Type	Effective	Employee Election	Employer Contribution	Remove
[01/01/2010-12/31/2010]	Healthcare (FSA)	01/01/2010	1500.00	0.00	X
[01/01/2010-12/31/2010]	Dependent Care	01/10/2010	3000.00	0.00	X

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.

Reimbursement Account Home

Employer: PayFlex FSA Demo 1 (Flex) – 20

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

Administrative Billing

Employer: PayFlex COBRA Demo 1 (COBRA) - 22

Outstanding Admin Invoice Total: \$0.00

Period Start	Invoice Id	Period End	Status	As Of	Amount Invoiced	Amount Due
No records found.						

Date Created	Title	File Extension	Download
No records found.			

Please allow up to 7 days for invoice payments to be reflected on this portal.

Funding Register Reports

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

Portal Administration

- Reimbursement Accounts
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 - Employee Account Management
 - Add Employee
 - Debit Cards
 - Administrative Billing
 - Funding Register History**
 - Renewal History
 - Real-Time Transaction Register
 - Plan Reporting Archive
 - On-Demand Reports

Reimbursement Account Home

Employer: PayFlex FSA Demo 1 (Flex) - 20

Dashboard

Plan Year: 01/2010 to 12/2010

Participants: Count: 1

YTD FICA Savings: \$38.25

YTD Summary

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Healthcare (FSA)	\$0.00	\$265.00	(\$265.00)	\$2,000.00	\$1,735.00

Debit Cards: Active: 1, Inactive: 0

Portal Administration

- Reimbursement Accounts
 - Dashboard
 - Employee Account Management
 - Add Employee
 - Debit Cards
 - Administrative Billing
 - Funding Register History**
 - Renewal History
 - Real-Time Transaction Register
 - Plan Reporting Archive

Funding Register History

Employer: All

Start Date: 12/11/2008 End Date: 06/11/2010

Document Type: All

Apply Filter

Date Created	Title	File Extension	Download
06/01/2010 00:00	Settlement Payment Register Report	csv	Download
06/01/2010 00:00	Settlement Payment Register Report	pdf	Download
06/01/2010 00:00	Funding Notification Report	pdf	Download
06/01/2010 00:00	Production Payment Register Report	csv	Download

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.

Reimbursement Account Home

Employer: PayFlex FSA Demo 1 (Flex) - 20

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

Transaction Register

Previous Month | Next Month | Normal View

Employer: PayFlex COBRA Demo 1 (COBRA) - 22

June 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

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.

The screenshot shows the 'Reimbursement Account Home' page for 'PayFlex FSA Demo 1 (Flex) - 20'. The left navigation menu is expanded to show 'On-Demand Reports'. A callout bubble points to this option with the text 'Select "On-Demand Reports"'. The main content area displays a 'Dashboard' with the following information:

- Employer:** PayFlex FSA Demo 1 (Flex) - 20
- Plan Year:** 01/2010 to 12/2010
- Participants:** Count: 1
- YTD FICA Savings:** \$38.25

A 'YTD Summary' table is shown below:

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

At the bottom, it shows 'Debit Cards' with 'Active: 1' and 'Inactive: 0'.

The screenshot shows the 'On-Demand Reports' page. The left navigation menu is expanded to show 'Resource Center'. The main content area contains a form to generate a report:

- Employer:** PayFlex FSA Demo 1 (Flex) - 20
- Report:** [Dropdown menu]
- Start:** [Text input field]
- End:** [Text input field]
- Plan Year:** [Dropdown menu]
- Format:** [Dropdown menu]
- Mask Member ID Numbers:**
- Submit:** [Submit button]