



# EMPLOYER

## Quickstart Guide



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## Employer Portal

Managing your Flexible Spending Accounts (FSA), Health Reimbursement Arrangements (HRA), and Transportation Management Accounts (TMA) benefit plan information has never been easier! Our secure one-stop shop built exclusively for employers gives you the tools you need to better support your employees in the management of their pre-tax benefit plans.

The Employer Portal is designed with self service capabilities and ease of use. This portal will allow users to:

- 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

Customize the portal by adding your company logo to align the branding of the portal with the branding of your company.

Keep in mind, administrative rights are based on the user's access level. Each role determines access rights not only to administrative pages and operations, but also to underlying data in applicable reports. User access level is determined by your employer and can be updated using the Administrator Access Form.

## Access the Employer Portal

Paylocity provides a secure portal through which all authorized users can gain access to the required information while ensuring they only have access to the underlying data applicable to their user rights. This section provides step-by-step instructions for secure access and login to the Employer Portal.

1. Navigate to [www.beneflexhr.com](http://www.beneflexhr.com)
2. Enter username and password
  - Beneflex will automatically assign administrative users with a username and a temporary password
  - Temporary password is only valid for 2 days
3. Upon first login, users will be prompted to change the password
4. Once password is updated and confirmed, select **Login**

**paylocity** | *benefit account*

### Login

<b>Existing User?</b> Login to your account	<b>New User?</b> <a href="#">Create your new username and password</a>
Username <input type="text"/> <a href="#">Forgot Username?</a>	
Password <input type="password"/> <a href="#">Forgot Password?</a>	
<input type="button" value="Login"/>	

Contact Us - Call Customer Service at (800) 631-3539 or Email us at [batinfo@paylocity.com](mailto:batinfo@paylocity.com)

# Home Page

Once users log on, everything they need to efficiently and effectively manage their account(s) can be accessed from the home page. Users will have access to the administration of their plan which includes employee level data and reporting capabilities.

From the home page, you can:

- View employee level data
- View recently created reports along with quick links to access the latest versions
- 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

A personalized welcome message, company logo along with recent login information will display.

The screenshot shows the Paylocity Benefit Account home page for user Jennifer Shaw. The page features the Paylocity and Benefit Account logos at the top left, and the user's name and a Logout link at the top right. Below the header is a navigation menu with links for HOME, REPORTS, EMPLOYEES, PLANS, RESOURCES, and LINKS. The main content area includes a personalized welcome message for Jennifer, followed by a section titled 'Recently Created Reports' which lists five 'Employer Funding Notification' reports with their creation dates and options to view details or download as Excel. A 'View All Reports' link is provided below the list. At the bottom, there is a 'Questions?' section with contact information for customer service. The footer contains three columns: 'Reports', 'Recently Viewed Report Types', and 'Recently Viewed Employees', each with a list of links and a brief description of the content.

**paylocity** | **benefit account**

Last Login Date: 6/26/2018 3:40:05 PM CDT  
Last Login Source: Employer Portal

Jennifer Shaw ▾ | [Logout](#)

HOME | REPORTS | EMPLOYEES ▾ | PLANS | RESOURCES | LINKS ▾

**Welcome, Jennifer**

Welcome to your benefits administration solution. View your plan details, access reports, manage employee information, and more!

**Recently Created Reports**

- [Employer Funding Notification \(6/13/2018\)](#)  
Created: 6/13/2018 | Detail Report | EXCEL
- [Employer Funding Notification \(6/12/2018\)](#)  
Created: 6/12/2018 | Detail Report | EXCEL
- [Employer Funding Notification \(6/4/2018 - 6/5/2018\)](#)  
Created: 6/5/2018 | Detail Report | EXCEL
- [Employer Funding Notification \(6/1/2018\)](#)  
Created: 6/1/2018 | Detail Report | EXCEL
- [Employer Funding Notification \(5/31/2018\)](#)  
Created: 5/31/2018 | Detail Report | EXCEL

[View All Reports](#)

**Questions?**  
Contact Customer Service at (800) 631-3539 or [batinfo@paylocity.com](mailto:batinfo@paylocity.com).

Reports	Recently Viewed Report Types	Recently Viewed Employees
<a href="#">Employees</a>	Up to 5 of the most recently viewed report types will appear here as you view reports.	Up to 5 of the most recently viewed employees will appear here as you view employees.
<a href="#">Plans</a>		
<a href="#">Resources</a>		

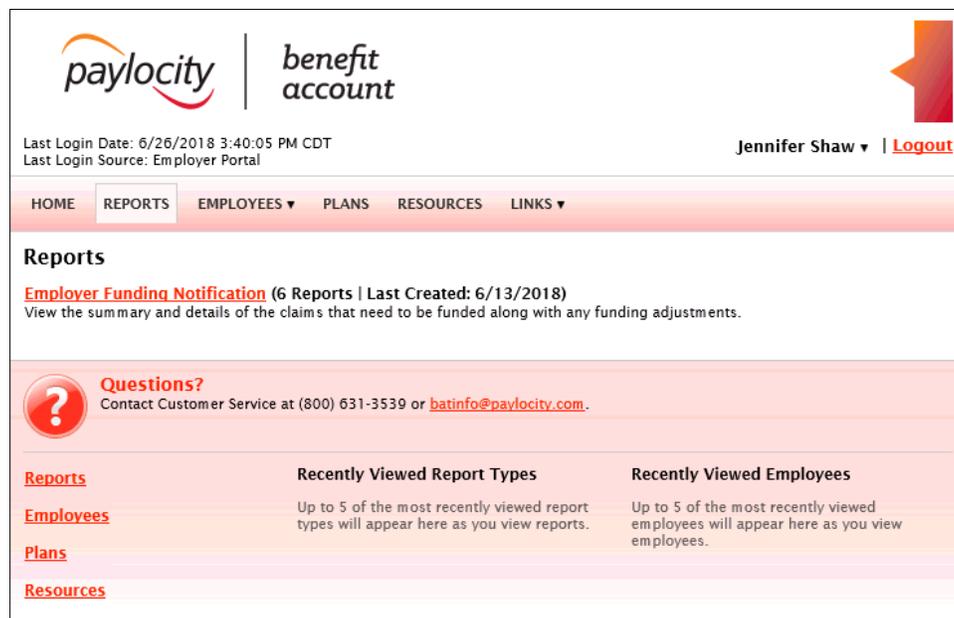
## View Reports and Notifications

Reports are an integral part of actively managing any benefits. Reports provide a common platform to keep administrators abreast of the current conditions so that they can make informed decisions. The Employer Portal provides reporting that gives insight into plan performance.

On the Reports screen, users will see a list of reports they are scheduled to receive. Some reports are also available on demand and can be ran as of a specific date to provide employers with more comprehensive reporting capabilities.

1. Navigate to the **Reports** tab from the **Home** page. A list of all available reports will be displayed
2. Select the report link you would like to view

In addition to accessing current reports, users also have access to run some reports on demand. Simply select the **Run New Report** link next to the specified report to meet your specific needs.



The screenshot shows the Paylocity Benefit Account interface. At the top left is the Paylocity logo, and at the top right is the 'benefit account' logo. Below the logos, the user's last login date and source are displayed: 'Last Login Date: 6/26/2018 3:40:05 PM CDT' and 'Last Login Source: Employer Portal'. The user's name, 'Jennifer Shaw', and a 'Logout' link are also visible. A navigation menu includes 'HOME', 'REPORTS', 'EMPLOYEES', 'PLANS', 'RESOURCES', and 'LINKS'. The 'REPORTS' section is active, showing a 'Reports' heading and a link for 'Employer Funding Notification' (6 Reports | Last Created: 6/13/2018) with a brief description. Below this is a 'Questions?' section with contact information for customer service. At the bottom, there are sections for 'Recently Viewed Report Types' and 'Recently Viewed Employees', each with a description of how many items will be displayed.

**paylocity** | **benefit account**

Last Login Date: 6/26/2018 3:40:05 PM CDT  
Last Login Source: Employer Portal

Jennifer Shaw | [Logout](#)

HOME REPORTS EMPLOYEES ▼ PLANS RESOURCES LINKS ▼

### Reports

[Employer Funding Notification](#) (6 Reports | Last Created: 6/13/2018)  
View the summary and details of the claims that need to be funded along with any funding adjustments.

**Questions?**  
Contact Customer Service at (800) 631-3539 or [batinfo@paylocity.com](mailto:batinfo@paylocity.com).

Reports	Recently Viewed Report Types	Recently Viewed Employees
<a href="#">Employees</a>	Up to 5 of the most recently viewed report types will appear here as you view reports.	Up to 5 of the most recently viewed employees will appear here as you view employees.
<a href="#">Plans</a>		
<a href="#">Resources</a>		

## Access Employees in the Portal

Under the tab titled, **Employees**, users can get real-time data and detailed views on all enrolled employees. Users will have the option to view all employees, add an employee, search for a specific employee or review your most recently viewed employees.

1. Navigate to the **Employees** tab
2. Search for employees using first name, last name, or employee identified (defined ID or SSN) or select employee's name link
3. Dependent upon your access level, users can perform the following tasks within the **Employees** tab:
  - **Profile**  
Review/Add or Edit an Employee's Profile Information
  - **Dependents**  
Review/Add or Edit Dependent Information
  - **Account Summary**  
View a Real-Time Summary of the Employee's Current and Previous Plans
  - **Enrollments**  
View/Add/Update an Employee's Current Enrollment, Inactive Enrollments and Previous Plan Information
  - **Contributions**  
View an Employee's Scheduled Contributions, History of Contributions including Payroll or Employer Contributions
  - **Claims**  
View Claim Information Submitted by a Specific Employee
  - **Payments**  
View the Disbursement History for an Employee
  - **Status**  
Review/Update Employee's Enrollment Status, i.e., active, terminated, LOA, etc.
  - **Debit Card**  
View Debit Card and Purse Information



benefit  
account



Last Login Date: 6/26/2018 4:29:09 PM CDT  
Last Login Source: Employer Portal

Jennifer Shaw ▾ | [Logout](#)

[HOME](#) [REPORTS](#) [EMPLOYEES ▾](#) [PLANS](#) [RESOURCES](#) [LINKS ▾](#)

## Chandler Bing: Profile

Employee Status: Active (1/1/2015)  
Employee Number: 0004871467

[Profile](#) [Dependents](#) [Account Summary](#) [Enrollments](#) [Contributions](#) [Claims](#) [Payments](#) [Status](#) [Debit Card](#)

[Update Profile](#)

### Personal Information

Name:	Chandler Bing
Username:	cbing2222
SSN:	xxx-xx-2222
Gender:	Male
Marital Status:	--
Address:	10805 Sunset Office Dr Suite 401 St Louis, MO 63127 United States
Home Phone:	--
Work Phone:	(314) 909-6979
Email:	cbing@cpc.com

### Employment Information

Status:	Active
Status Effective Date:	1/1/2015
Employee Number:	0004871467
Employer Employee ID:	
Hire Date:	1/1/2015
Hours Worked Per Week:	40

## Access Plan Information

On the plan detail screen, users will have access to plan information, plan details and the Summary Plan Description.

1. Navigate to the **Plans** tab
2. View employee information for current and previous plan years
3. Select the **Plan** link to be redirected to the plan's details

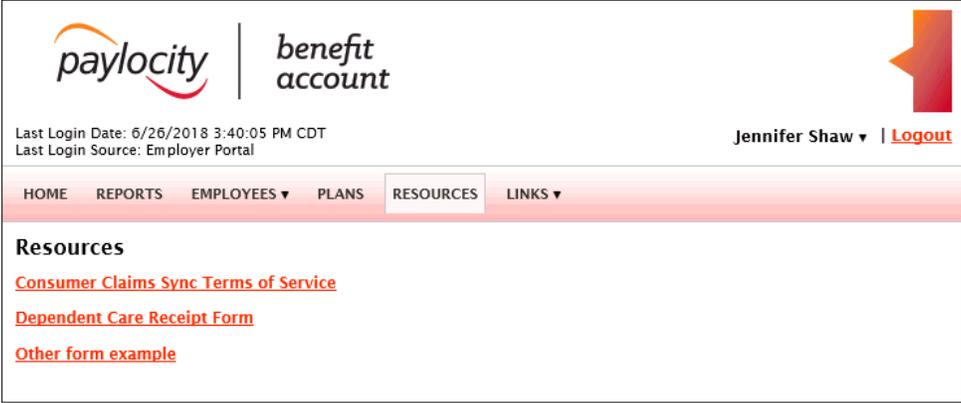


The screenshot displays the Paylocity Benefit Account interface. At the top left, the Paylocity logo is shown next to the text "benefit account". On the top right, there is a red arrow icon pointing left, the user name "Jennifer Shaw", and a "Logout" link. Below the header, a navigation bar contains links for HOME, REPORTS, EMPLOYEES (with a dropdown arrow), PLANS (highlighted), RESOURCES, and LINKS (with a dropdown arrow). The main content area is titled "Plans" and is divided into two sections: "Active Plans" and "Previous Plans". Under "Active Plans", there is a link for "Deductible HRA (1/1/2018 - 12/31/2018)" with a brief description: "An HRA is a Health Reimbursement Arrangement. It is an IRS approved arrangement employers use to reimburse employees for a variety of qualified medical expenses."

## Access Resources

Easily accessed from the Employer Portal, the **Resources** tab provides users quick links to electronic forms to help keep the clutter off their desk. This section contains links to important forms pertaining to the user's specific plan.

1. Navigate to the **Resources** tab
2. Quickly download and print forms or custom materials related to your individual plans



The screenshot shows the Paylocity Benefit Account interface. At the top left, the Paylocity logo is displayed next to the text "benefit account". Below the logo, the user's last login information is shown: "Last Login Date: 6/26/2018 3:40:05 PM CDT" and "Last Login Source: Employer Portal". On the right side, the user's name "Jennifer Shaw" is displayed with a dropdown arrow and a "Logout" link. A navigation bar contains the following items: HOME, REPORTS, EMPLOYEES (with a dropdown arrow), PLANS, RESOURCES (highlighted), and LINKS (with a dropdown arrow). Below the navigation bar, the "Resources" section is visible, containing three links: "Consumer Claims Sync Terms of Service", "Dependent Care Receipt Form", and "Other form example".

# Create A New Employee Profile

1. From either the **Employees** tab dropdown or the **Employees** screen, select **Add Employee** to add a new Employee Profile
  2. Once selected, administrators will enter the employee's demographic information and employment information. When completed the system will generate the employee's login information
  3. Enter employee information into applicable fields  
NOTE: Required fields are marked with a red asterisk. While only fields containing an asterisk are required, by adding additional information users can make this a more resourceful system to use.
  4. Select **Add Employee** to save changes or **Cancel** to discard changes.
- NOTE: The system automatically generates a HIPAA secured member ID number instead of using the Social Security Number. This is used on all employer reports instead of a Social Security Number to ensure security of Protected Identifiable Information (PII).

The screenshot shows the 'Add Employee Profile' form in the Paylocity Benefit Account system. The form is divided into three main sections: Personal Information, Employment Information, and Login Information. The Personal Information section includes fields for First Name, Middle Initial, Last Name, Birth Date, SSN, Gender, and Marital Status. The Employment Information section includes fields for Employee Number, Employer Employee ID, Hire Date, and Hours Worked Per Week. The Login Information section includes fields for Username and Password. The form also includes a navigation menu at the top with options like HOME, REPORTS, EMPLOYEES, PLANS, RESOURCES, and LINKS. The user's name, Jennifer Shaw, and a Logout button are visible in the top right corner. A red asterisk indicates required fields. At the bottom, there are buttons for 'Add Employee' and 'Cancel'.

paylocity benefit account  
Last Login Date: 6/26/2018 3:40:05 PM CDT  
Last Login Source: Employer Portal  
Jennifer Shaw | Logout

HOME REPORTS EMPLOYEES PLANS RESOURCES LINKS

### Add Employee Profile

#### Personal Information

\* First Name:

Middle Initial:

\* Last Name:

\* Birth Date:  mm/dd/yyyy  
Format date as mm/dd/yyyy

\* SSN:  -  -

Gender:  Female  
 Male

Marital Status:  Married  
 Single

#### Address

\* Country:

\* Address Line 1:

Address Line 2:

\* City:

\* State:

\* ZIP Code:

Home Phone Number:  -  -

Work Phone Number:  -  -  Ext.

\* Email Address:

#### Employment Information

\* Employee Number:

Employer Employee ID:

\* Hire Date:  mm/dd/yyyy  
Format date as mm/dd/yyyy

\* Hours Worked Per Week:

#### Login Information

You may either share this login information with the employee to login with or direct them to create their own username and password from the "Create your new username and password" link on the login page.

\* Username: Usernames are setup to automatically be created using the following pattern:  
[firstinitial][lastname][lastfourdigitsSSN][state]

\* Password: Beneflex.  
Passwords are setup to automatically be created using the following pattern:  
[0-9]

\* Required Field

# Update an Employee Profile

1. Choose employee and select **Update Profile** in the employee profile screen
2. Update information as needed  
NOTE: Only fields containing an asterisk are required, however, by adding additional information Administrators can make this a more resourceful system.
3. Select **Update Employee** at bottom of screen to save information or **Cancel** to discard changes
4. Once saved, notification will display at top of screen indicating employee's information has been successfully updated

The screenshot shows the 'Chandler Bing: Update Profile' form in the Paylocity Benefit Account. The form is divided into two main sections: 'Personal Information' and 'Employment Information'. The 'Personal Information' section includes fields for First Name (Chandler), Middle Initial, Last Name (Bing), Birth Date (2/1/1972), SSN (222-22-2222), Gender (Male selected), Marital Status (Single selected), Address (Country: United States, Address Line 1: 10805 Sunset Office Dr, Address Line 2: Suite 401, City: St Louis, State: Missouri, ZIP Code: 63127), Home Phone Number, Work Phone Number (314-909-0979), and Email Address (cbing@cpc.com). The 'Employment Information' section includes Status (Active), Employee Number (0004871467), Employer Employee ID, Hire Date (1/1/2015), and Hours Worked Per Week (40). At the bottom of the form, there are buttons for 'Update Employee' and 'Cancel'. A legend indicates that fields with an asterisk are required.

paylocity | benefit account

Last Login Date: 6/26/2018 4:20:09 PM CDT  
Last Login Source: Employer Portal

Jennifer Shaw | Logout

HOME REPORTS EMPLOYEES PLANS RESOURCES LINKS

### Chandler Bing: Update Profile

Status: Active (1/1/2015)  
Division: Unassigned

#### Personal Information

\* First Name:

Middle Initial:

\* Last Name:

\* Birth Date:   
Format date as mm/dd/yyyy.

\* SSN:  -  -

Gender:  Female  
 Male

Marital Status:  Married  
 Single

Address

\* Country:

\* Address Line 1:

Address Line 2:

\* City:

\* State:

\* ZIP Code:

Home Phone Number: (  )  -

Work Phone Number: (  )  -  Ext.

\* Email Address:

#### Employment Information

Status: Active

\* Employee Number:

Employer Employee ID:

\* Hire Date:   
Format date as mm/dd/yyyy.

\* Hours Worked Per Week:

\* Required Field

|

## Add a New Employee Enrollment

1. After the Employee Profile has been successfully added, select **Add New Enrollment**
2. Select the **Plan Year** and **Plan** from dropdown
3. Select the checkbox for the applicable plan you would like to enroll the participant in
4. Depending on plan selected, enter the **Effective Date** and **Contribution Level/Election Amount**, if applicable  
NOTE: Dropdown selections vary based on plan selected.
5. Select **Submit** to enroll employee or **Cancel** to disregard changes



- HOME
- REPORTS
- EMPLOYEES ▼
- PLANS
- RESOURCES
- LINKS ▼

### Craig Black: Profile

Employee Status: Active (6/25/2018)  
Employee Number: 1357

**Employee Profile Added**  
There are no enrollments yet for the employee. Click on the 'Add New Enrollment' button to immediately add enrollment(s) now.

[Add New Enrollment](#)

- Profile**
- [Dependents](#)
- [Account Summary](#)
- [Enrollments](#)
- [Contributions](#)
- [Claims](#)
- [Payments](#)
- [Status](#)
- [Debit Card](#)

[Update Profile](#)

#### Personal Information

Name:	Craig Black
Username:	cblack3333il
SSN:	xxx-xx-3333
Gender:	Male
Marital Status:	Single
Address:	9029 W. Elm Street Brookfield, IL 60513 United States
Home Phone:	--
Work Phone:	--
Email:	Cblack@paylocity.com

#### Employment Information

Status:	Active
Status Effective Date:	6/25/2018
Employee Number:	1357
Employer Employee ID:	
Hire Date:	6/25/2018
Hours Worked Per Week:	40

# Update an Employee Status

1. Within the **Employees** tab, select the applicable employee
2. Select the **Status** tab
3. Click on **Add New Status** under the Actions column to update an employee's status
4. Select a **new Status** from the dropdown.  
NOTE: Dropdown selections vary based on plan selected.
5. Enter **Status Effective As Of Date**  
NOTE: Status Effective As Of Date is always the date after the qualifying event date. For example, if the employee's last day is 10/1, then the effective date should be 10/2.
6. Select **Add Status** located at bottom of page to confirm change or **Cancel** to discard changes  
NOTE: Once status is updated, a green confirmation banner will display informing the user that the new status was successfully added.
7. Once status has been saved, select **Add New Status** or **Remove Status** under the Actions column, if necessary
  - **Add New Status** allows users to update status
  - **Remove Status** allows users to remove the change of status

The screenshot displays the Paylocity Benefit Account interface. At the top, the Paylocity logo and 'benefit account' text are visible. The user is identified as Jennifer Shaw, with a 'Logout' link. The navigation menu includes 'HOME', 'REPORTS', 'EMPLOYEES', 'PLANS', 'RESOURCES', and 'LINKS'. The main content area is titled 'Joey Tribbiani: Status' and shows the current status as 'LaidOff (6/26/2018)' with an employee number of 0004871469. A green banner indicates 'Status Added' with the message 'You have successfully added a new status.' Below this is the 'Employee Status History' table.

Status Effective Date	Status	Status Details	Actions
6/26/2018	LaidOff	No Additional Details	<a href="#">Add New Status</a> <a href="#">Remove Status</a>
1/1/2015	Active	No Additional Details	