paylocity

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.

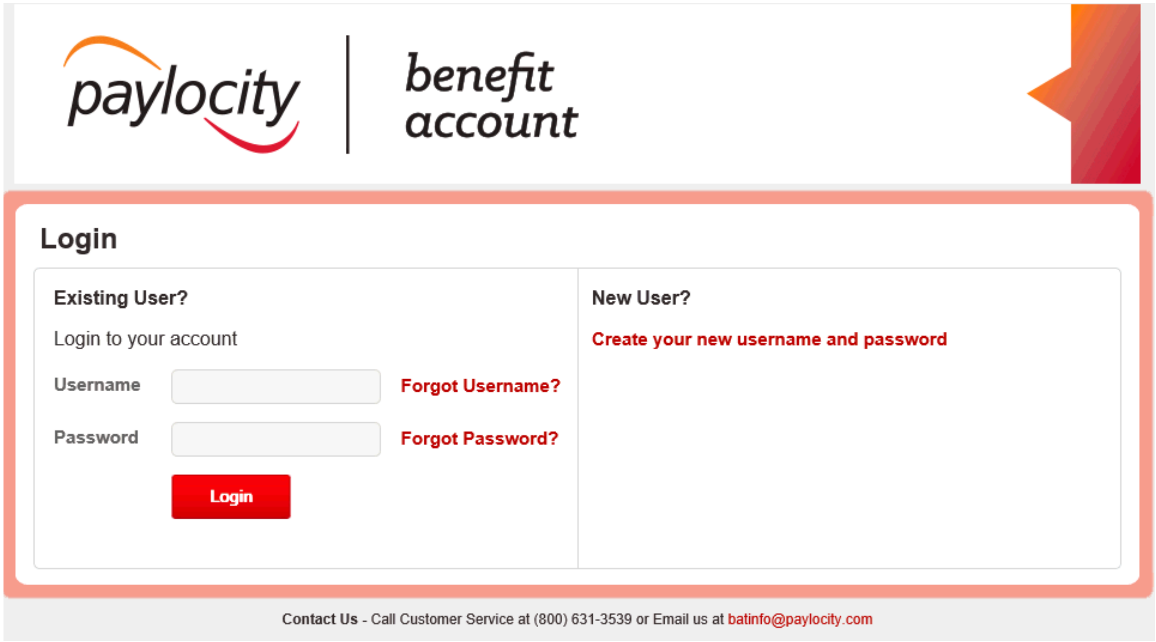
1. Navigate to www.beneflexhr.com

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**



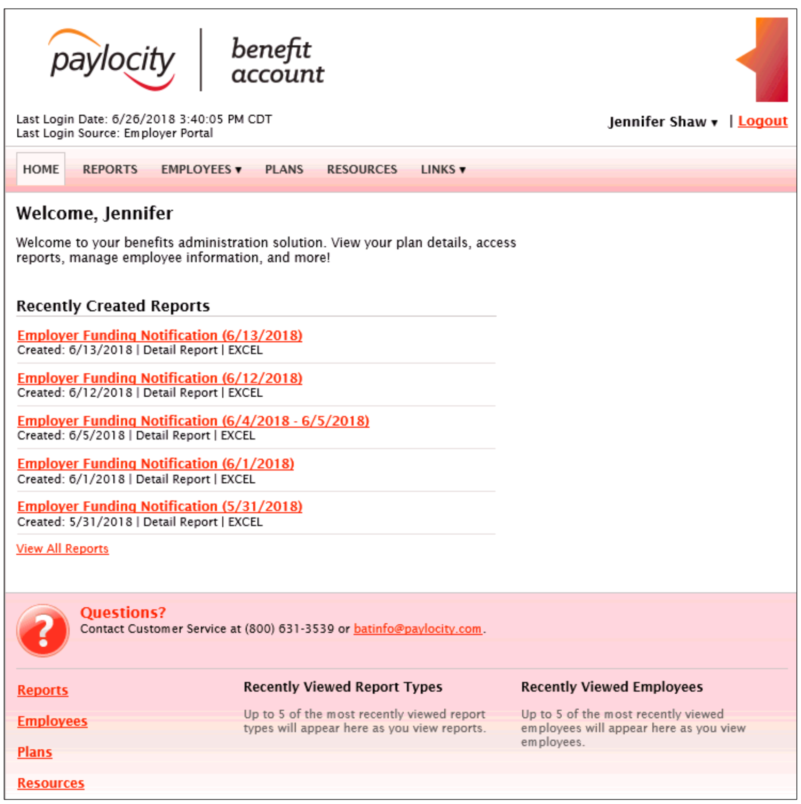
Home Page

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.



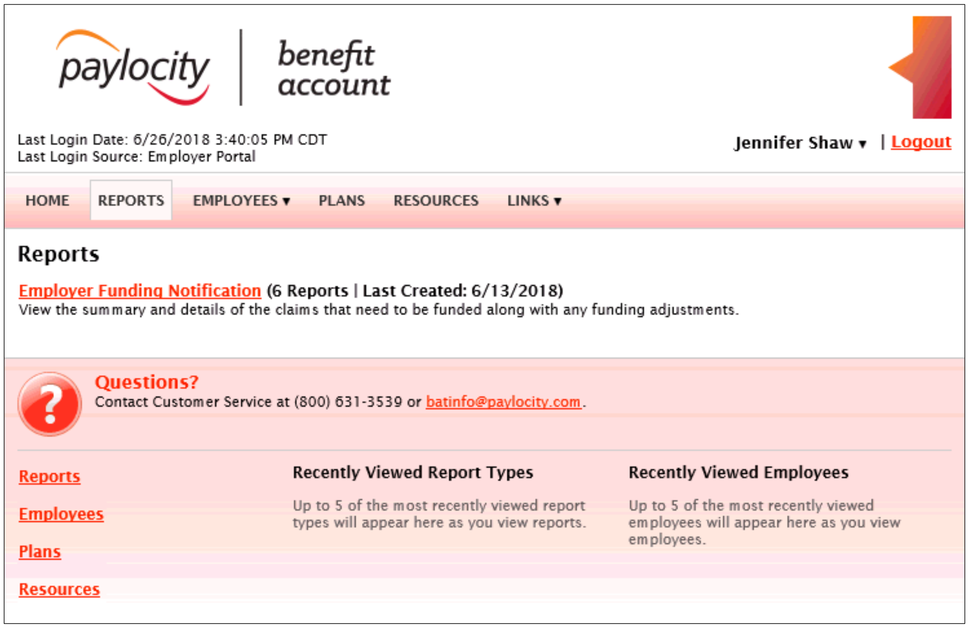
View Reports and Notifications

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.



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

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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

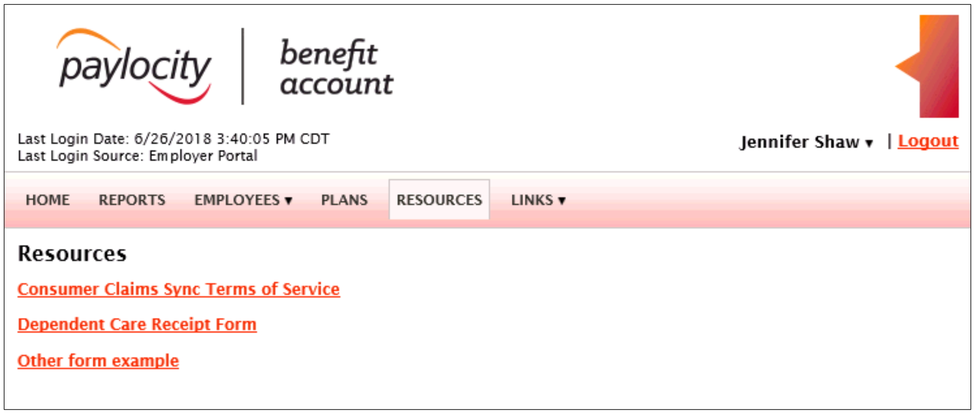
3. Select the **Plan** link to be redirected to the plan's details

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

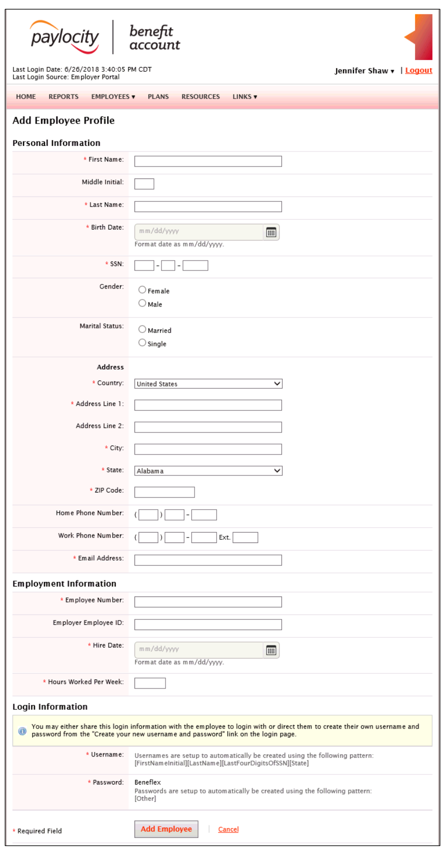
2. Quickly download and print forms or custom materials related to your individual plans



Create A New Employee Profile

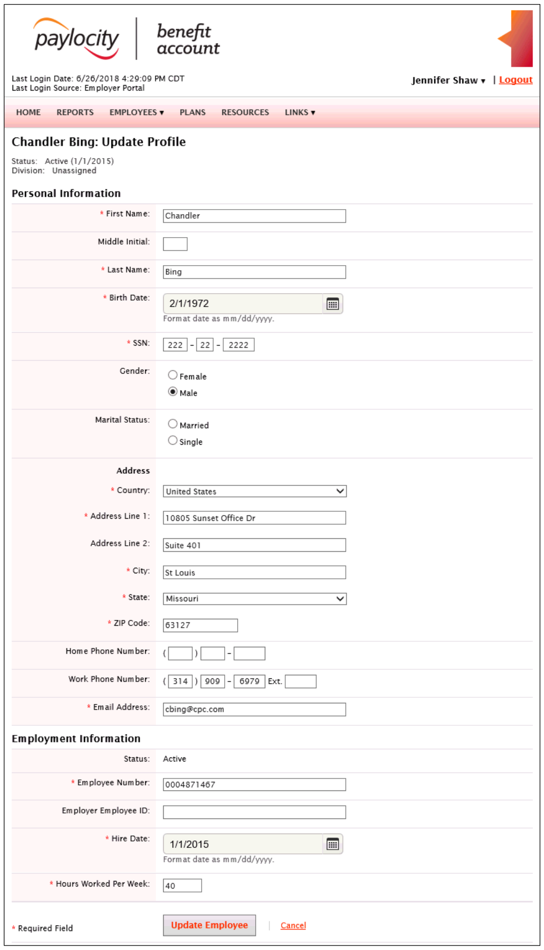
1. From either the **Employees** tab dropdown or the **Employees** screen, select **Add Employee** to add a new Employee Profile
2. Once selected, administrators will enter the employee's demographic information and employment information. When completed the system will generate the employee's login 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).



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



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

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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