EMPLOYEE
Quickstart Guide

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Employee Portal Overview

Your company offers a variety of benefits that are designed to make your life easier, provide you with great coverage that is affordable to you and support your goals for the future. To that end, we'd like to welcome you to the Online Employee Portal.

This one-stop portal allows you to manage your tax-favored accounts (Flexible Spending Account (FSAs), Health Reimbursement Arrangement (HRA), Health Savings Account (HSA), and Transportation Management Account (TMA) that includes Parking and/or Transit and gives you 24/7 access to view step-by-step instructions on how to:

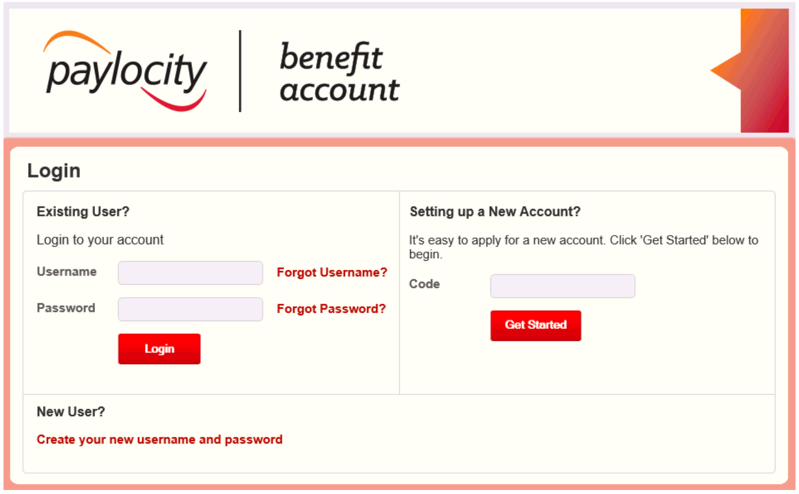
- Change your login ID and/or password
- Benefit enrollment
- File a claim online
- Upload receipts and track expenses
- View account balance and activity
- View your claims history and payment (reimbursement) history
- Update your personal profile information
- Download plan information, forms and notifications
- Report a lost/stolen Benny Card and request a new one

Accessing the Employee Portal

Paylocity provides a secure portal through which all authorized users can gain access to their benefit information. This section provides step-by-step instructions for secure access and login to the Employee Portal.

1. Navigate to www.beneflexhr.com
2. Enter your **Username** and **Password**
    - The Username is a combination of:
      -the user's first initial of their first name
      -the users entire last name
      -the last four digits of the users social security number (SSN)
      -the two letter abbreviation for the user's home state

      Example: John Smith 000-00-1234 Illinois would be entered as jsmith1234il (not case sensitive)
    - The initial temporary password is "beneflex" (all lower case)
    - Users will be prompted to change the password upon initial login
3. Select **Login**



Employee Portal Home Page

The Home Page is a dashboard which allows you to quickly and easily access and manage your account information.

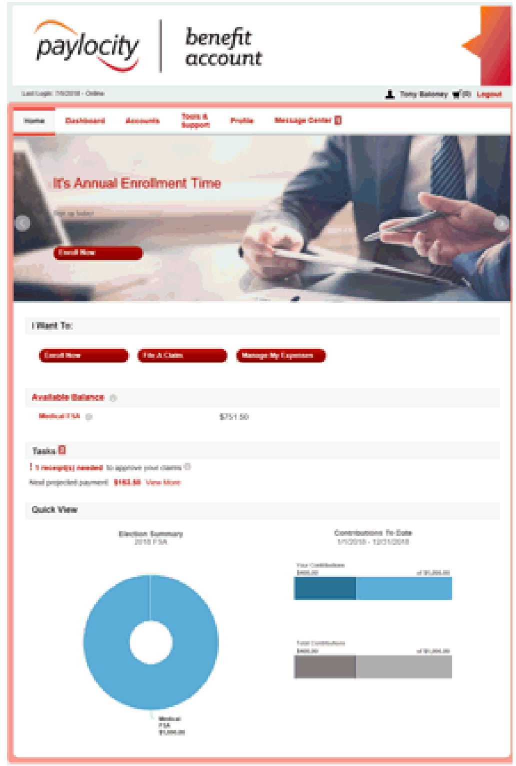
Easily access Available Balance, File A Claim, Manage Expenses, View Recent Transactions, Pending Tasks and more!

The **I Want To…** section contains the most frequently used features for the Employee Portal

Available Balance links to the Account Summary page where you can see and manage your accounts

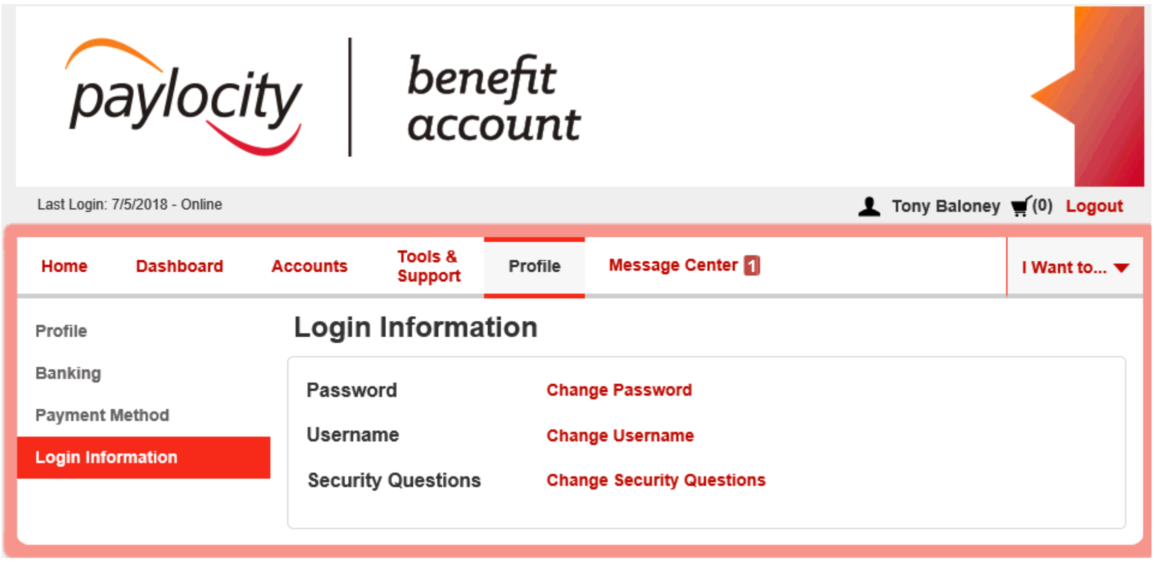
The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts, e.g., receipt requests, Paylocity Benefit Card repayments, etc.

The **Quick View** graphically displays key account information



Update Login Information

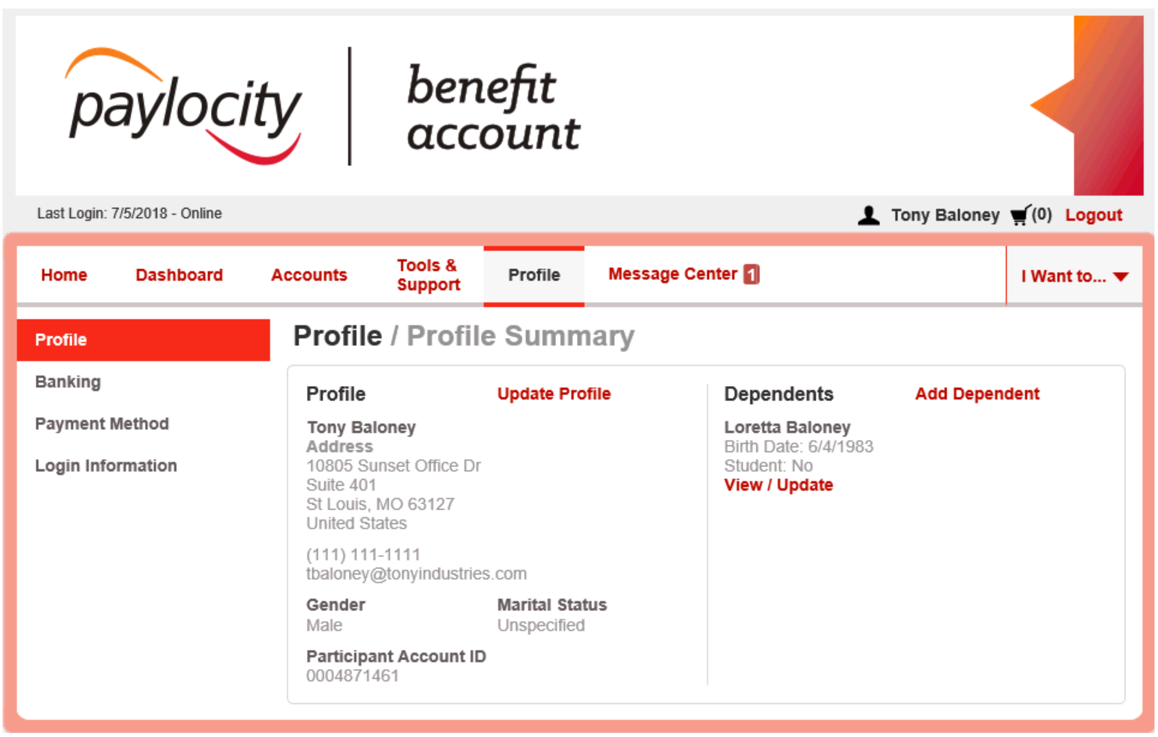
1. From the **Home** page, select the **Profile** tab
2. Select **Login Information** from left-hand navigation bar
3. Select applicable link for needed change
4. Follow instructions on the screen
    - For new users, upon initial log in you will be prompted to change the password that was assigned by your plan administrator
    - Follow the instructions to complete the change
5. Select **Save**



Updating Personal Profile

Review and update your personal profile summary details, dependent information, and beneficiaries.

1. From the **Home** page, navigate to the **Profile** tab
2. Select **Update Profile** link
3. Complete your changes as needed
4. Some profile changes will require you to answer an additional security question
5. Select **Submit** to save changes or **Cancel** to discard changes
6. Updates will appear on the Profile Summary screen

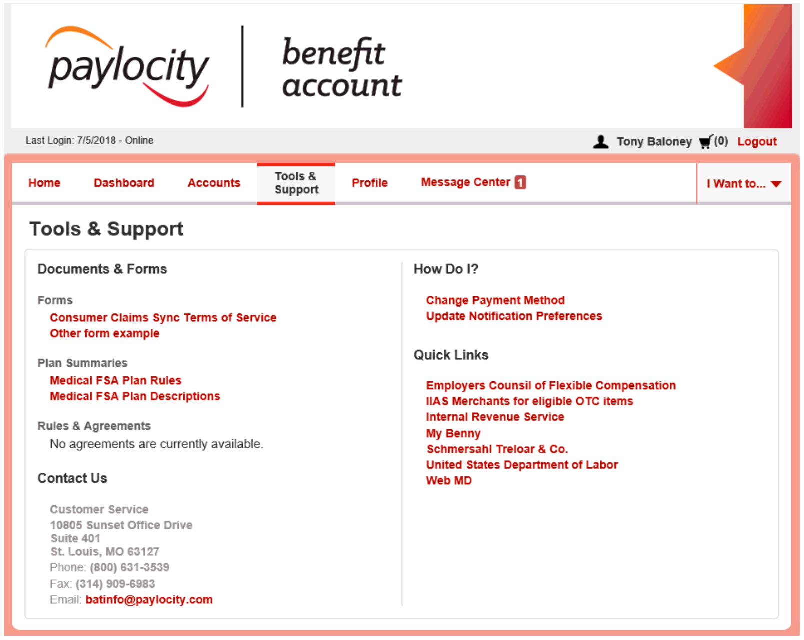


Sign-Up for Direct Deposit

The fastest way to get to be reimbursed for expenses is to enroll for direct deposit to a personal checking account. If your employer offers direct deposit, use the following step-by-step instructions to enroll.

1. From the **Home** page, navigate to the **Tools & Support** tab
2. Select **Change Payment Method** under the **How Do I?** section
3. Select **Banking/Cards** and then **Add Bank Account**
4. Select **Payment Method**. Go to the **Alternate Payment Method** and choose **Direct Deposit** and select **Submit**
5. Enter your bank account information
6. Select **Submit**
7. The **Payment Method Changed** confirmation displays

NOTE: If there is a bank validation requirement, you will be notified on the portal to look for a small transactions or "micro-deposit" in your designated bank account in the next couple days to enter online, which will validate your account.



Report Missing and/or Request a New Paylocity Benefit Card

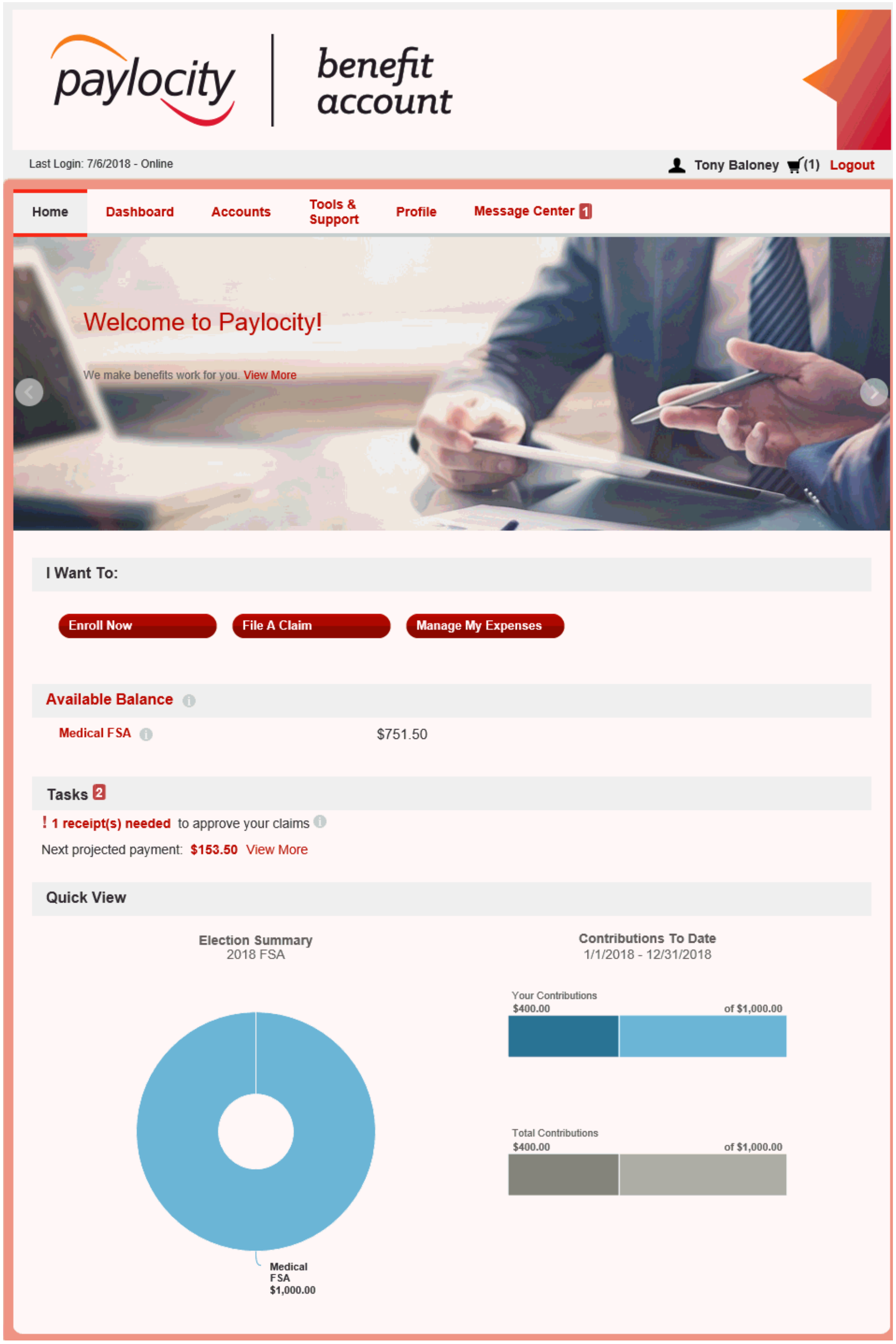
The Paylocity Benefit Card makes it easy to access the money you've set aside in your tax advantaged benefit account such as an FSA, HSA, TMA, and/or HRA. Simply use your card to pay for qualified expenses at any IIAS Merchant. The amount of your purchase will be automatically deducted from your account using you pretax dollars and electronically transferred to the merchant for payment. Note: The Paylocity Benefit Card is not available for all plans. Check with your employer for specific details regarding your account.

1. From the **Home** page, navigate to the **Profile** tab
2. Select **Banking** link from left-hand navigational section
3. Under the **Debit Card** column, select **Report Lost/Stolen** or **Order Replacement**
4. Complete the online instructions
5. Click **Submit**

Filing Claims and Uploading Receipts

Claim filing made easy with the Paylocity claim filing wizard! The wizard simply walks users through their claim submission including entry of information, payee details and uploading itemized bills/receipts.

1. On the **Home** page, select **File a Claim** <u>OR</u> from any page on the portal expand the **I Want To...** section on the top right-hand side of the screen
2. Using the **Pay From** dropdown, select the account from which you would like to receive reimbursement
3. Using the **Pay To** dropdown, select a payee and then click **Next**
4. Select the **Upload Valid Documentation** to upload required receipt. Additional receipts can be added to the claim by clicking on the **Add Another Receipt** link
5. Select **Next** to enter the remaining **Claim Details**
6. Once the information has been added, click **Next** and your claim will be added to the **Claims Basket** on upper right-hand of page
7. To add more than one claim, select **Add Another**
8. Once all claims have been entered, select **Submit** to send the claims for processing
   NOTE: 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.
9. Print the **Claim Confirmation Form** for your records
10. If you see a **Receipts Needed** link in the Tasks section of your Home page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page. Simply click to expand the line item to view claim details and **Upload Receipts** link.


paylocity
benefit account
Last Login: 7/6/2018 - Online
Tony Baloney
(1)
Logout
Home
Dashboard
Accounts
Tools & Support
Profile
Message Center 1
Welcome to Paylocity!
We make benefits work for you. View More
I Want To:
Enroll Now
File A Claim
Manage My Expenses
Available Balance
Medical FSA
$751.50
Tasks 2
! 1 receipt(s) needed to approve your claims
Next projected payment: $153.50 View More
Quick View
Election Summary
2018 FSA
Medical FSA $1,000.00
Contributions To Date
1/1/2018 - 12/31/2018
Your Contributions
$400.00
of $1,000.00
Total Contributions
$400.00
of $1,000.00

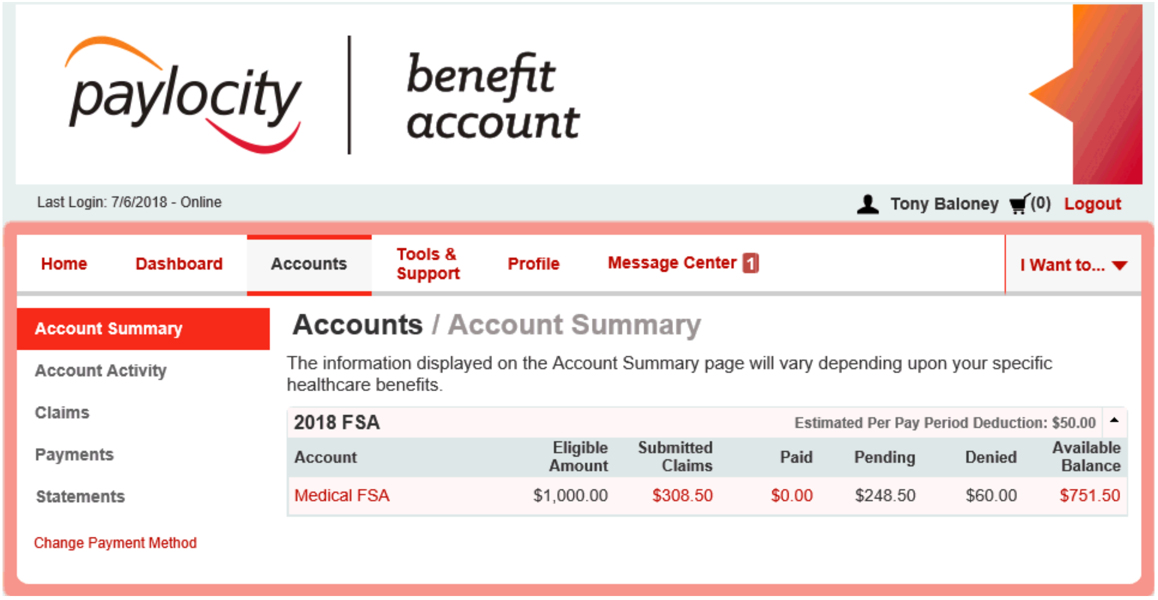
View Account Balance and Activity

For Account Balance Only:

1. On the **Home** page, navigate to the **Available Balance** section

For Account Activity:

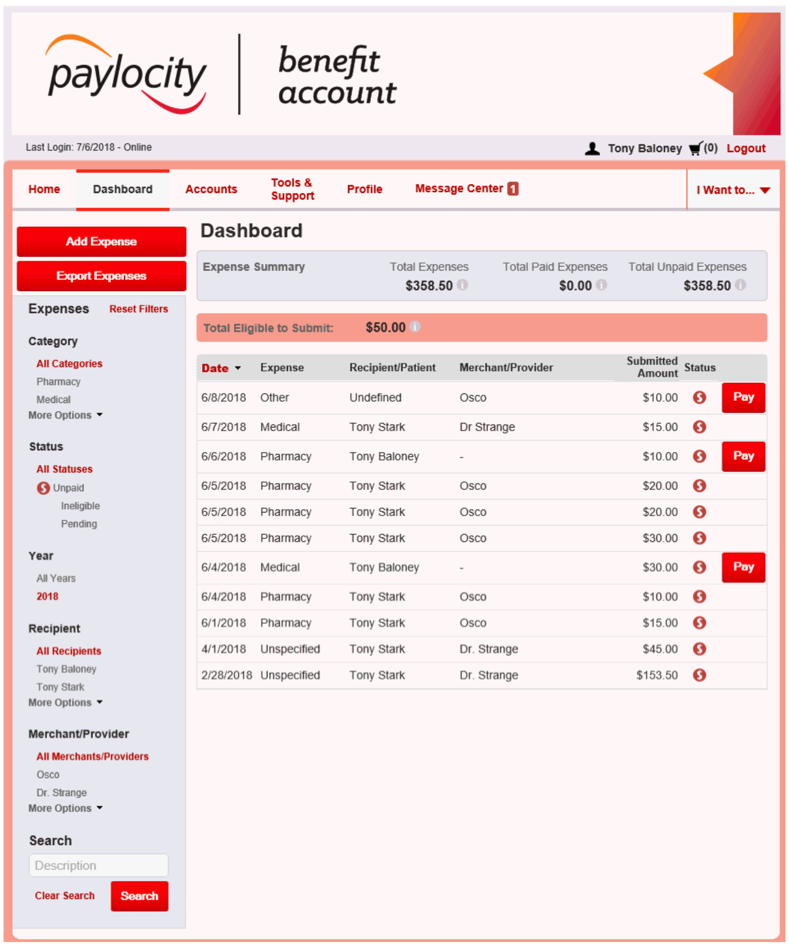
1. Select the **Available Balance** link on the **Home** page to be redirected to the **Account Summary** page
2. Select a dollar amount to display more details



Track Expenses

On the **Dashboard** tab, you can easily view healthcare expenses for ongoing management of medical claims, premiums, and card transactions.

1. Filter expenses by selecting the **filter options** on the navigation pane on the left side of the screen or by clicking on the **field headers** within the Dashboard
2. Search for specific expenses using the **Search** field at the bottom left of the screen

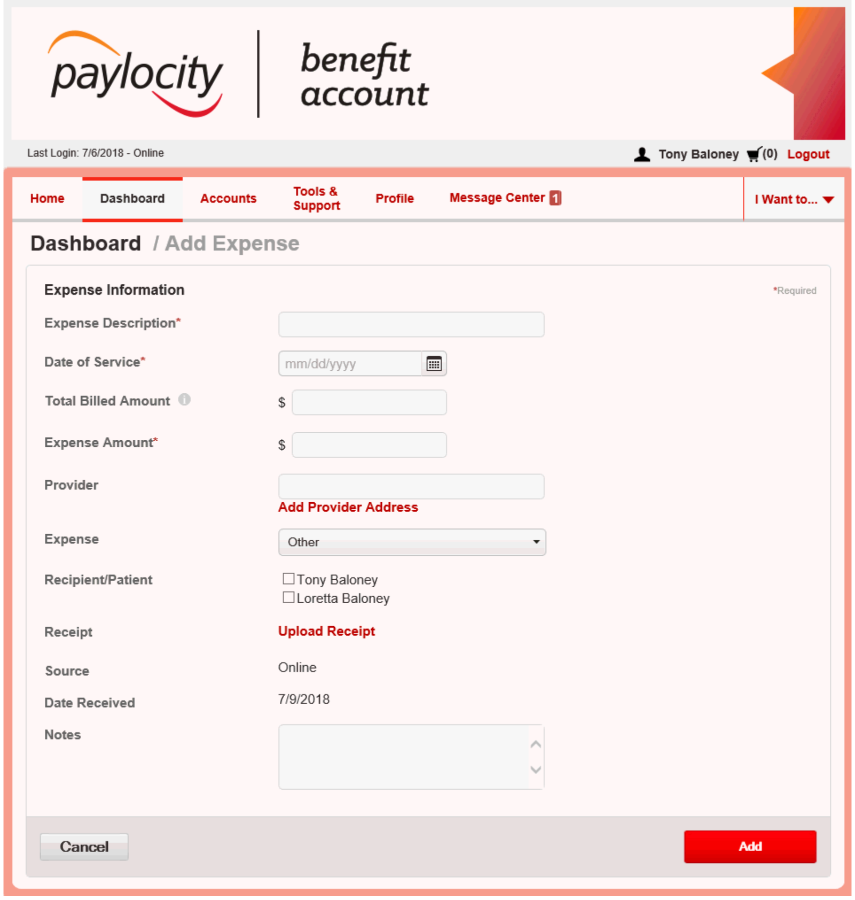


Add an Expense to the Dashboard

Navigate to the **Dashboard** tab

1. Select **Add Expense** in the upper left side of the page
2. Complete the expense information fields. You can also upload a copy of the receipt and add notes for your records
3. Once the expense has been added to the **Dashboard**, you will have the option to pay the expense

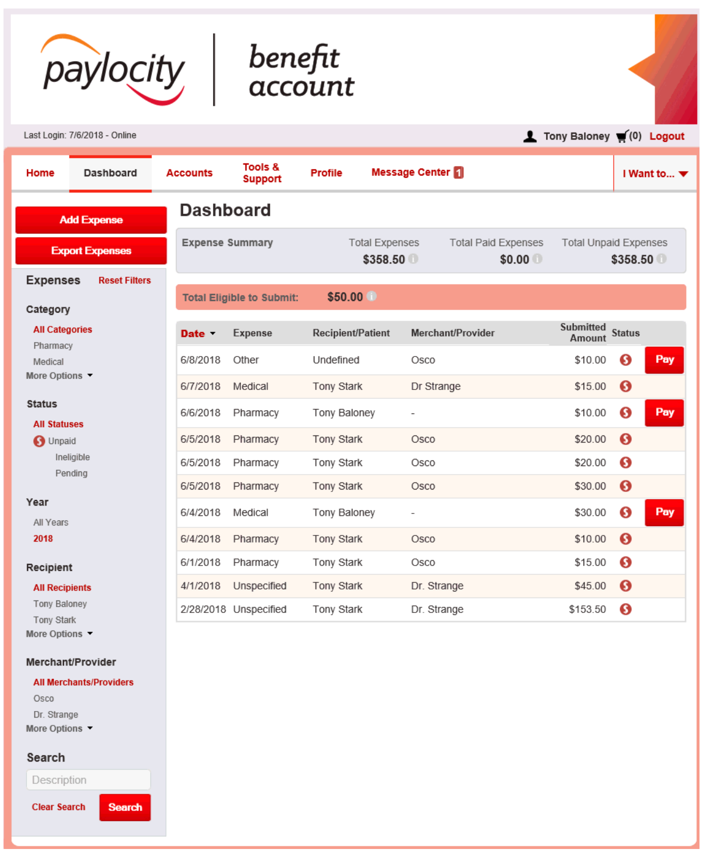
NOTE: Adding an expense to the **Dashboard** will not generate a reimbursement until you opt to pay it. See **Pay an Expense from the Dashboard** for further details.



Pay an Expense from the Dashboard

Process payments and reimbursements for unpaid expenses directly from the Dashboard page.

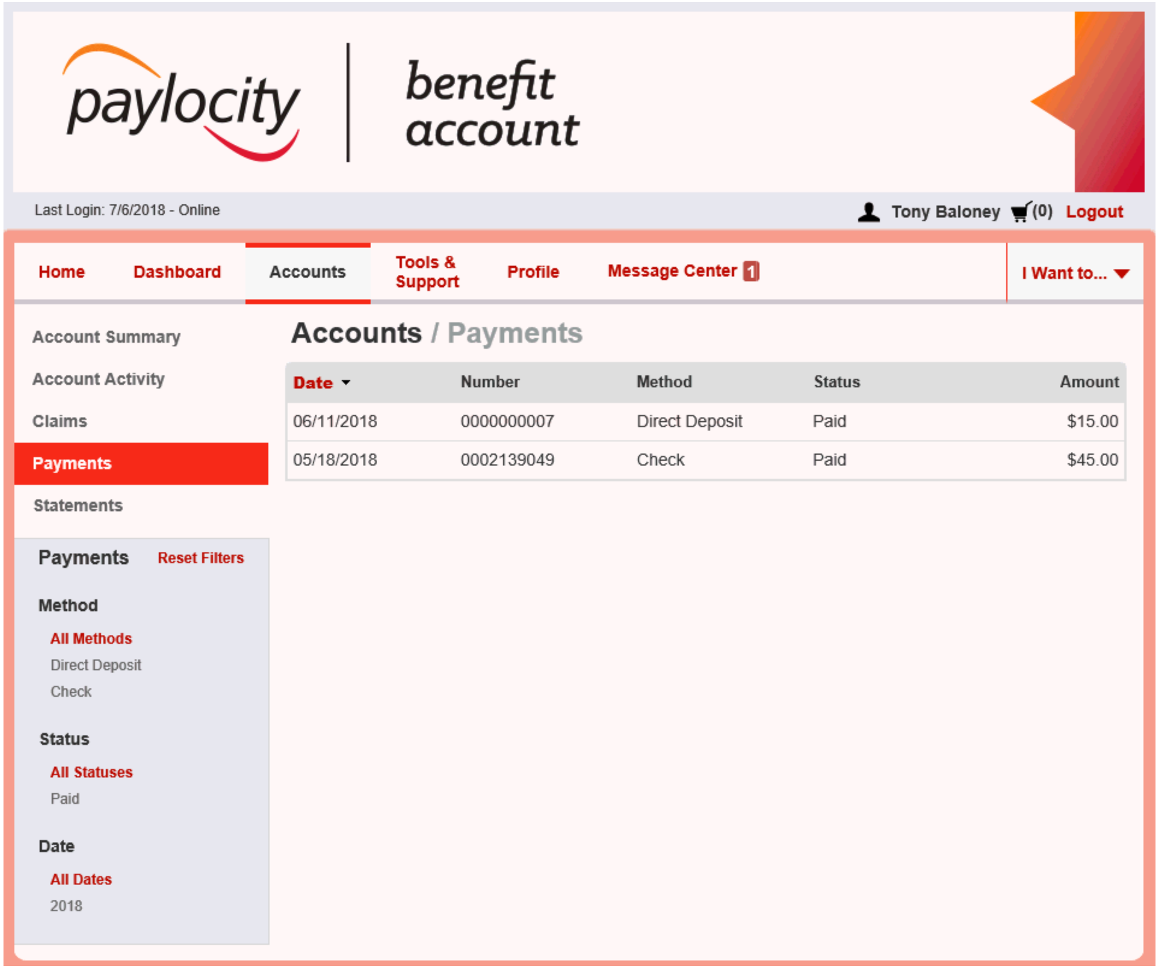
1. Navigate to the **Dashboard** tab
2. Expenses will be categorized and payments can be initiated for unpaid expenses by selecting the **Pay** button to the right of the expense details
3. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment
4. When you click **Pay,** the claim details from the Dashboard will be pre-populated within the claim form
5. Review and edit the claim details as needed and then **Submit** for processing



View Payment History

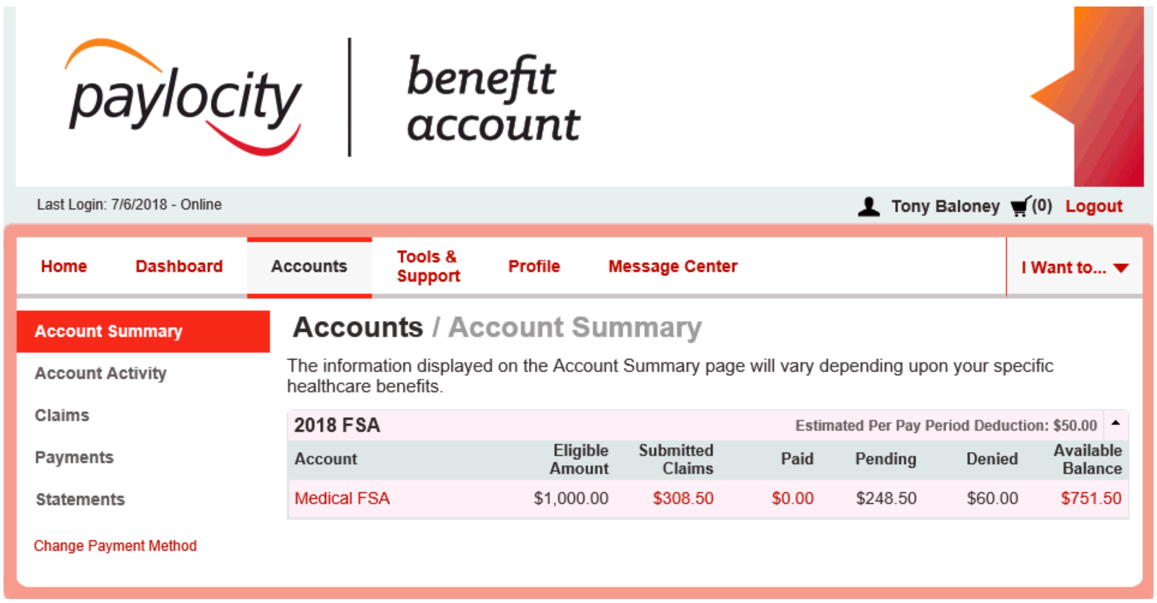
View reimbursement payments made to date, including debit card transactions.

1. Navigate to the **Accounts** tab
2. Select **Payments** from the left hand side of the screen and reimbursement payments made to date including debit card transactions will display. Apply filters from the left-hand side of the screen to filter by **Method**, **Status** and **Date**
3. Click on the line of the claim payment to expand the data to display additional details about the transaction



Access Plan Information

1. Navigate to the **Accounts** tab
    - Click on the **Account Summary** tab from the left side navigation pane
2. Select the applicable **Account** name to open the **Plan Rules,** including Filing Rules, Debit Card Rules and Claim Summary if applicable
3. <u>**OR**</u> from the **Home** page, under the **Tools & Support** tab, you may view **Plan Summaries** for basic information.
4. Select each applicable plan to see plan details



Mobile

Manage your benefits anywhere, 24/7 with our mobile app. Convenient, real-time access to all your benefit accounts makes it easy to view recent account activity along with the ability to:

- Submit Claims
- Check Account Balances
- Track Healthcare Expenses
- Upload Pictures of Receipts
- Receive Text Alerts
- View Message Center
- Access Eligible Expense Scanner
- Accept HSA Custodial Agreements
- Complete HSA Transactions
- View HSA Investments

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