EMPLOYER PORTAL QUICKSTART GUIDE

Welcome to Pro-Flex Administrators' Employer Portal. This one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Health Savings Accounts (HSAs), Flexible Spending Accounts (FSAs), and Health Reimbursement Arrangements (HRAs).

The Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- View current and prior year plan information
- Access forms and documents
- Retrieve over 50 scheduled reports or notifications
- Load data files
- Submit service requests
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Access history of reports and notifications
- Add, update and enroll employees
- Add and manage recurring contributions

EMPLOYER PORTAL QUICKSTART GUIDE

HOW DO I GET ACCESS TO THIS PORTAL?

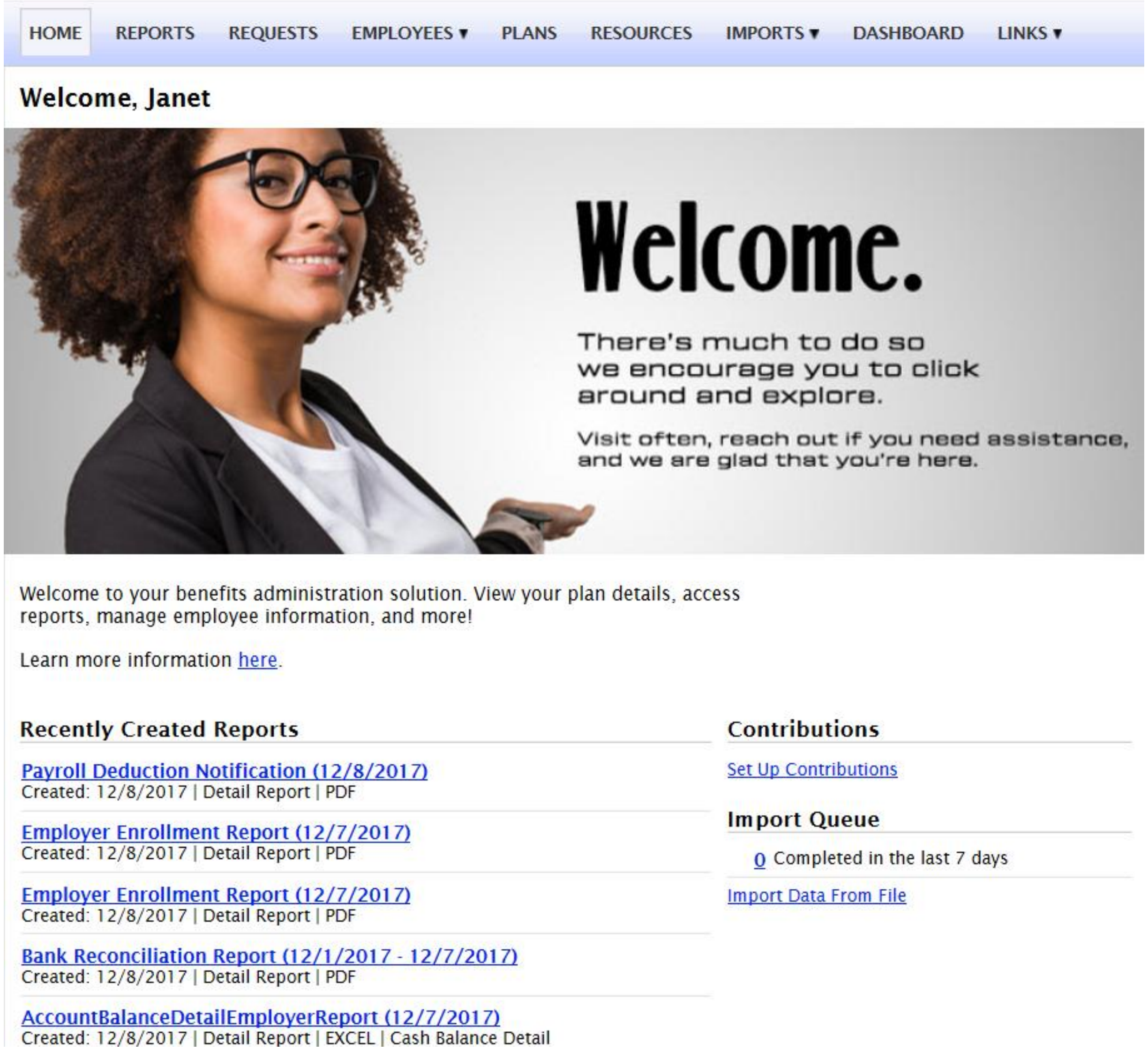
1. You and your assigned contacts will be sent a username and a temporary password.
2. Upon first login, you will be prompted to change the password.
3. Once password is updated and confirmed, click **Login**

The **Home Page** is easy to navigate:

Once you're logged on, everything you need to efficiently and effectively manage your CDH Accounts is found on the home page. You will see a history of the reports and notifications with quick links to the latest versions. From the home page, you can:

- View employee level data
- Check on status of file imports
- Log requests
- Read plan documents
- Download forms
- View the employer dashboard

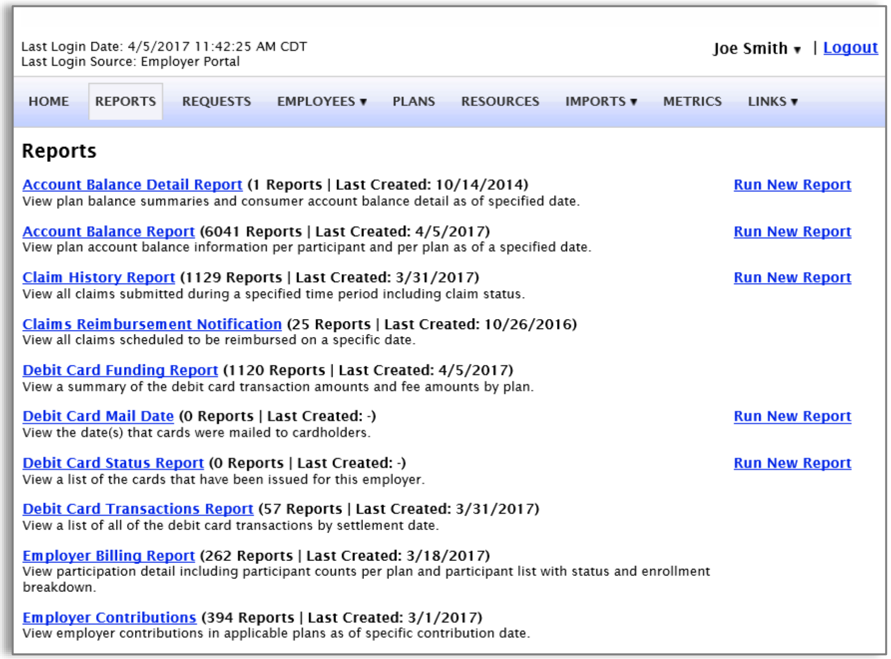
You can also access the tabs at the top of the page or links at the bottom of the page for easy navigation.



EMPLOYER PORTAL QUICKSTART GUIDE

HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. From the **Home Page**, click on the **Reports** tab, there will be a list of all available reports that can be viewed.
2. Simply select the relevant enrollment, financial, contribution or plan information report desired and it will automatically be displayed.
3. If there is a report that you need, but do not see, you can contact Pro-Flex Administraotrs to request it.



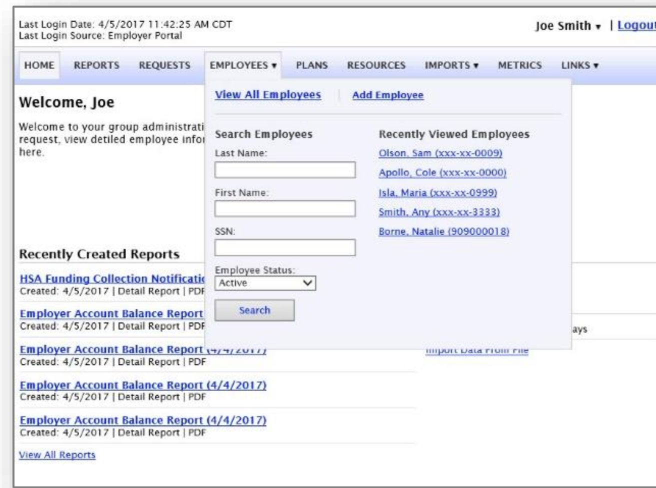
WILL I BE ABLE TO RUN MY OWN REPORTS IF NEEDED?

1. Select "Reports" Tab
2. Select Run New Report link next to the report you would like to run
3. Complete the field marked with the red asterisk
4. Report will generate. You can choose to be notified when the report is available.

EMPLOYER PORTAL QUICKSTART GUIDE

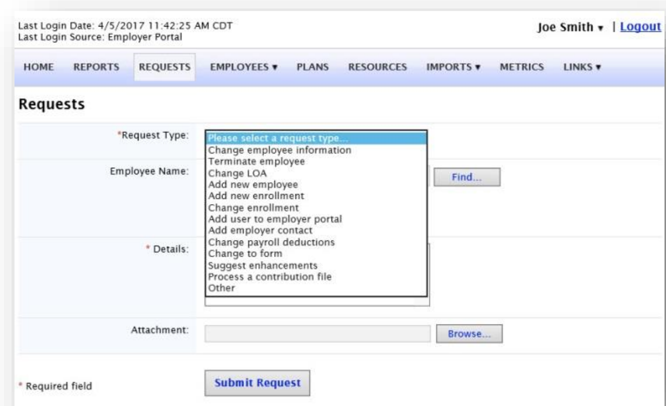
WHAT KIND OF EMPLOYEE-LEVEL DATA CAN I ACCESS?

1. Under the tab titled **Employees**, you can get real-time data on all enrolled employees.
2. You can search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access the following information:
   a. Account Summary
   b. Demographics
   c. Account Balances
   d. Enrollments
   e. Contributions
   f. Claims
   g. Payments
   h. Status



HOW DO I GET ACCESS FOR A NEW HR REP OR ADD NEW EMPLOYEES?

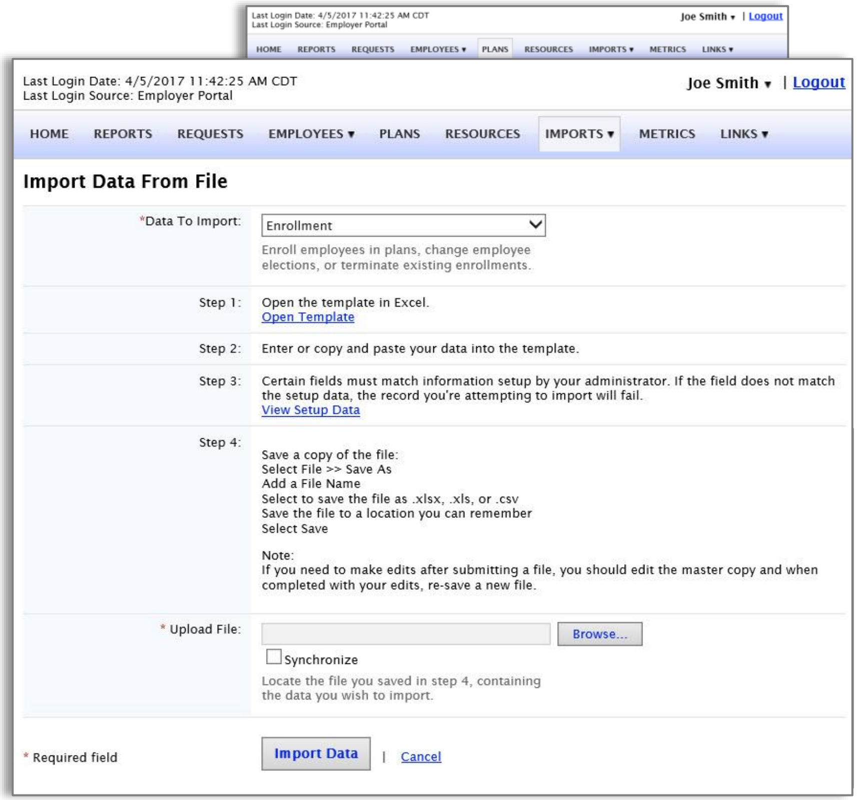
1. Click on Requests on the tab at the top or from the link at the bottom of the page.
2. Under Request Type, there is a drop down menu with over 10 options to choose from.
3. Choose the request type, i.e. add a new employee, add employer contact or change payroll deductions, then select a consumer from a list of employees, enter the request details and/or attach a document or file.
4. Click Submit Requests
5. All requests are securely delivered.



EMPLOYER PORTAL QUICKSTART GUIDE

WILL I BE ABLE TO ACCESS ANY OF MY PLAN INFORMATION?

1. Under the **Plans** tab, you will find options to view the same info as the employees for all active and inactive plans.
2. Information available here is:
    - Plan Summaries
    - Plan Details and Rules
    - Documents



WHERE WOULD I ACCESS REQUIRED FORMS?

1. Under the **Resources** tab.
2. In this section, you can download and print any forms needed.
3. You will also have access to any other documents or custom materials related to your plans in this tab.

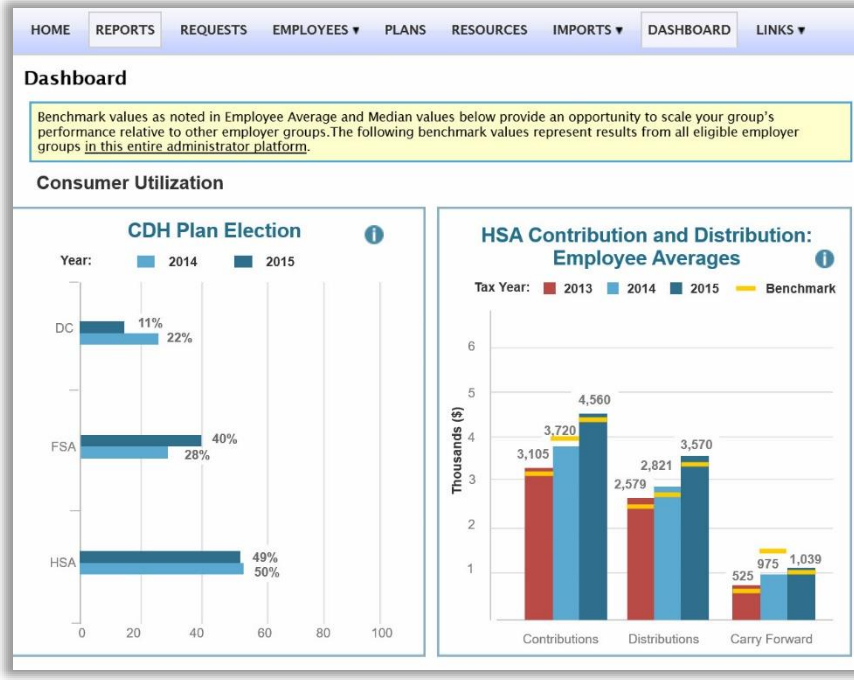
WILL I BE ABLE TO ADD/ENROLL/UPDATE EMPLOYEES?

1. Under the **Employees** Tab.
2. Select **Add Employee**.
3. Enter the Personal and Employment Information.
4. Click Add Employee.
5. In the Confirmation section click Add Enrollment.
6. Select the plan and click Enroll.
7. Enter the Effective Date and Election/Employer Contribution.
8. Click **Add Enrollment(s**).

EMPLOYER PORTAL QUICKSTART GUIDE

WILL I BE ABLE TO UPDATE AN EMPLOYEE STATUS?

1. Under the **Status** tab.
2. In the Actions section and click Add New Status.
3. Select the Status from the drop-down menu.
4. Enter the Status Effective as of date.
5. Click Add Status.



ONE OF THE FEATURES OF THE PORTAL IS THE ABILITY TO IMPORT DATA. HOW DOES THAT WORK?

1. Under the Imports tab you can import demographic, enrollment and contribution files directly into the portal using standard CSV formatted import files.
2. Once in the Imports home page, you would then select the type of data to be imported.
3. Open the template in excel.
4. Enter or paste your data into the template
5. Check for field matches by viewing setup data.
6. Save as CSV to a location you can remember.
7. Upload file.

Once imported, any errors will be displayed and can be easily updated from the **View Errors** button. Clicking on the record number allows you to correct the error. Then, click **Queue Record** and correction is made. You can then resubmit the file to import the corrected records.

WILL I BE ABLE TO VIEW EMPLOYER METRICS?

1. Under the Dashboard tab you can access your employer metrics and Smartview information.
2. Information available here includes:
   - Consumer Engagement Metrics
   - Utilization Metrics
   - Financial Metrics