

PAYFLEX®

Reimbursement account employer portal guide

Let's get started

1. Go to payflex.com.
2. Click **Sign In**, then select the Employer tab to log in.
3. Once you log in, you can change your password in the Your Profile section.

If you need assistance, contact your PayFlex account manager.



Reimbursement account home page

The dashboard is the first page displayed.

Here, you can:

- View reimbursement account information
- Manage portal access (if applicable)
- Review reimbursement account navigation options (on the left side of page)

Reimbursement account information

From the dashboard, you have access to a year-to-date (YTD) summary of the various accounts offered to your employees. The summary includes:

- Totals for deposits, payments and cash balances
- Annual elections and remaining elections

Click on the **hyperlinked numbers** to view the employees in the plan.

- You can see who has an active debit card and who is inactive (if applicable).
- You can also view the call center hours and your PayFlex account manager's contact information.

Portal administration

Using the left navigational panel, select the **Portal Administration** menu to view "Your Profile," "Your Messages" and "Portal User Management."

Your profile

Here, you can update your log-in credentials and demographic information. You can also view your assigned client roles.

Your messages

This view shows archived email messages that we've sent you. Filter your search by employer, along with start date and end date.

Portal user management (if applicable)

If you're a system administrator, select **Portal User Management**. Here, you can:

- View a list of employer web portal users
- Review and update information for any user by clicking on the user's name

When you click on a user's name, the user's profile and current role assignments will display. From here, you can edit or delete the user or associated role.

- **User profile:** Click **Edit User** to update the record. Click **Add Role** to add a new user role.
- **Role assignments:** Click **Edit** to update role assignments. When you edit a role, you will also determine the level of access for this user. Click **Delete** to remove a role assignment.

If you click **Add a User**, enter the user's information and click **Save**. Then, click **Add Role** or **Edit User**.

Available online reports

Here are examples of some reports you can download:

- **Election Report** — Displays employee accounts that were reported with an annual election.
- **Ledger Summary Report** — Displays employee account balances separated by division, if applicable. It summarizes by reporting period, YTD deposits, payments and balances.
- **Ledger Summary Report with Rollover** — Displays employee account balances separated by division, if applicable. It summarizes by reporting period, YTD deposits, payments and balances and any rollover amounts.
- **Employer Funding Summary Report** — Summarizes the total employee account transactions by date, account type and funding type.
- **Employer Funding Detail Report** — Covers all the employee account transactions by date, account type and funding type for a specified period by date.
- **Outstanding Checks Report** — Lists all employees with outstanding checks and includes date issued and amount.
- **Overpaid Employees Report** — Covers all employees who are in an overpayment status and includes overpayment amount and account type.

Reimbursement account navigational options

Using the left navigational panel, you can view the following:

- Employee account management
- Debit cards (if applicable)
- Renewal history
- Plan reporting archive
- On-demand reports (if applicable)

Employee account management

From the left navigational panel, click **Employee Account Management**.

- Enter any part of a participant's first or last name, member number or last four digits of member number.
- Click **Submit**.

Select a specific employee to view the employee information. Then, you can select any of the following links at the top of the screen:

- Accounts
- Employee debit cards (if applicable)
- Employee info
- Employee portal info

Note: If you're a non-file feed client, you can update this information online.

Debit cards (if applicable)

For debit card information, select **Debit Cards** from the left navigational panel. Select an employer and card status, then search by the employee's last name. Then click **Submit**.

Renewal history

Select **Renewal History** from the left navigational panel. Filter your search by employer, along with start date and end date.

Plan reporting archive

From the left navigation panel, select **Plan Reporting Archive**. Filter your search by employer, start date, end date and document type.

On-demand reports (if applicable)

In addition to the reports that we provide, you can also run reports on demand.

- Select **On-Demand Reports** from the left navigational panel.
- Complete the fields and click **Submit**. The requested report automatically loads to the web portal.
- You'll receive notification when the report is available.

Questions?

Visit **payflex.com** or call us directly at **1-844-PAYFLEX (1-844-729-3539)**.

We're here to help Monday – Friday, 7 a.m. – 7 p.m. CT,
and Saturday, 9 a.m. – 2 p.m. CT.

PayFlex Systems USA, Inc.

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