



## EMPLOYER PORTAL QUICKSTART GUIDE

Welcome to Davevic Benefit Consultants, Inc. 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 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
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Access history of reports and notifications
- View plan rules

And, user access levels are role-based. Each role determines access rights not only to administrative pages and operations, but also to underlying data in applicable reports.

## 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

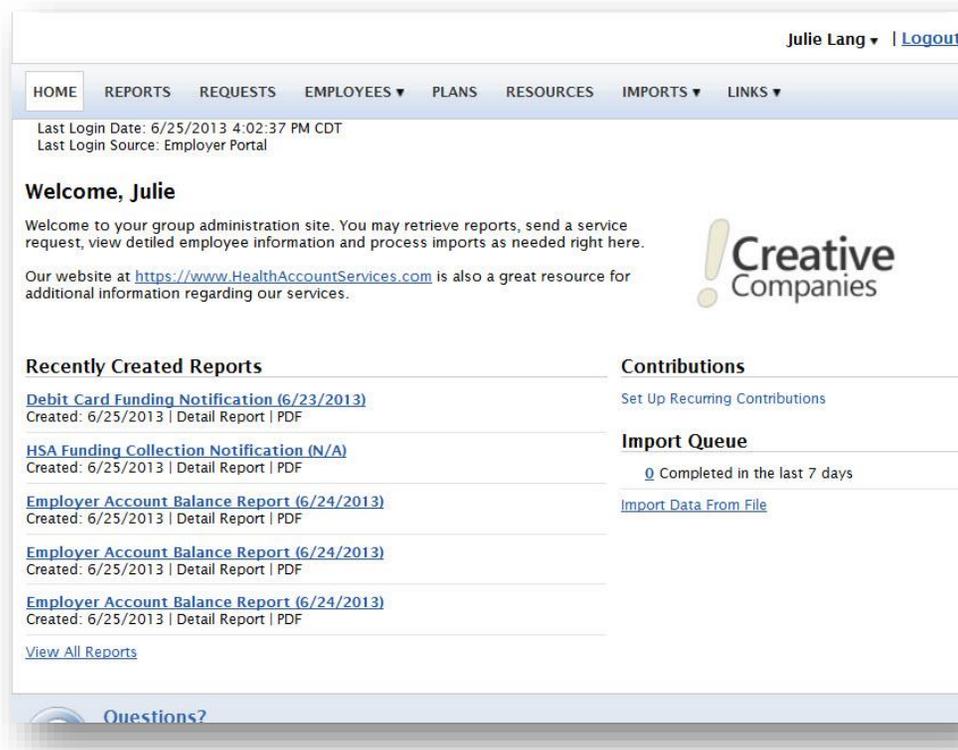
You can also access the tabs at the top of the page or links at the bottom of the page for easy navigation.

## 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 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.



The screenshot shows the user interface of the Creative Companies portal. At the top right, the user's name 'Julie Lang' and a 'Logout' link are visible. A navigation bar contains tabs for HOME, REPORTS, REQUESTS, EMPLOYEES, PLANS, RESOURCES, IMPORTS, and LINKS. Below the navigation bar, the user's last login date and source are displayed. A 'Welcome, Julie' message is followed by a brief introduction to the site and a link to the company website. The main content area is divided into two columns. The left column, titled 'Recently Created Reports', lists several reports with their creation dates and options to view details or download PDFs. The right column, titled 'Contributions', includes a link to 'Set Up Recurring Contributions' and an 'Import Queue' section showing a completion status. At the bottom of the page, there is a 'Questions?' link.

## HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. On the **Home Page**, under 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 Davevic Benefit Consultants to request it.

Julie Lang | Logout

HOME **REPORTS** REQUESTS EMPLOYEES ▾ PLANS RESOURCES IMPORTS ▾ LINKS ▾

Last Login Date: 6/25/2013 4:02:37 PM CDT  
Last Login Source: Employer Portal

### Reports

- [Account Balance Detail Report](#) (242 Reports | Last Created: 6/21/2013)  
View plan balance summaries and consumer account balance detail as of specified date.
- [Account Balance Report](#) (4637 Reports | Last Created: 6/25/2013)  
View plan account balance information per participant and per plan as of a specified date.
- [Claim History Report](#) (1067 Reports | Last Created: 6/21/2013)  
View all claims submitted during a specified time period including claim status.
- [Debit Card Funding Report](#) (1329 Reports | Last Created: 6/25/2013)  
View a summary of the debit card transaction amounts and fee amounts by plan.
- [Debit Card Settlement Report](#) (846 Reports | Last Created: 9/12/2011)  
View a list of all of the settled debit card transactions by settlement date that require funding.
- [Employer Billing Report](#) (251 Reports | Last Created: 6/18/2013)  
View participation detail including participant counts per plan and participant list with status and enrollment breakdown.
- [Employer Fee Funding Notification](#) (2 Reports | Last Created: 6/3/2013)  
View all fees to be funded on a specific date.
- [Employer Funding Notification](#) (42 Reports | Last Created: 6/17/2013)  
View the summary and details of the claims that need to be funded along with any funding adjustments.
- [Enrollment Summary Report](#) (302 Reports | Last Created: 6/18/2013)  
View a summary of participant enrollment in applicable plans as of specified date.

## 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

Julie Lang | Logout

HOME REPORTS REQUESTS **EMPLOYEES ▾** PLANS RESOURCES IMPORTS ▾ LINKS ▾

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### Cole Apollo: Enrollments

Employee Status: Active (4/1/2000)  
SSN: xxx-xx-0000  
Division: Unassigned  
HSA Status: Pending  
HSA Hold: Holds exist on this consumer's account that prevent financial transaction processing.

Profile Dependents **Account Summary** **Enrollments** Contributions Claims Payments Status

[Add Enrollment](#)

**Active Accounts**  
1/1/2013 - 12/31/2013  
Payment Method: Reimburse Myself By Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
<a href="#">Healthcare FSA</a>	1/1/2013	\$1,500.00	\$0.00 of \$0.00	\$0.00 of \$1,500.00	\$57.69 Bi-weekly	<a href="#">Update</a>
<a href="#">Dependent Care FSA</a>	1/1/2013	\$5,000.00	\$0.00 of \$0.00	\$0.00 of \$5,000.00	\$192.31 Bi-weekly	<a href="#">Update</a>