Discovery Benefits

FSA • HSA • HRA • COBRA • Transportation

www.DiscoveryBenefits.com
Phone: 866-451-3399 • Fax: 866-451-3245
PO Box 2926 • Fargo, ND 58108-2926
customerservice@discoverybenefits.com

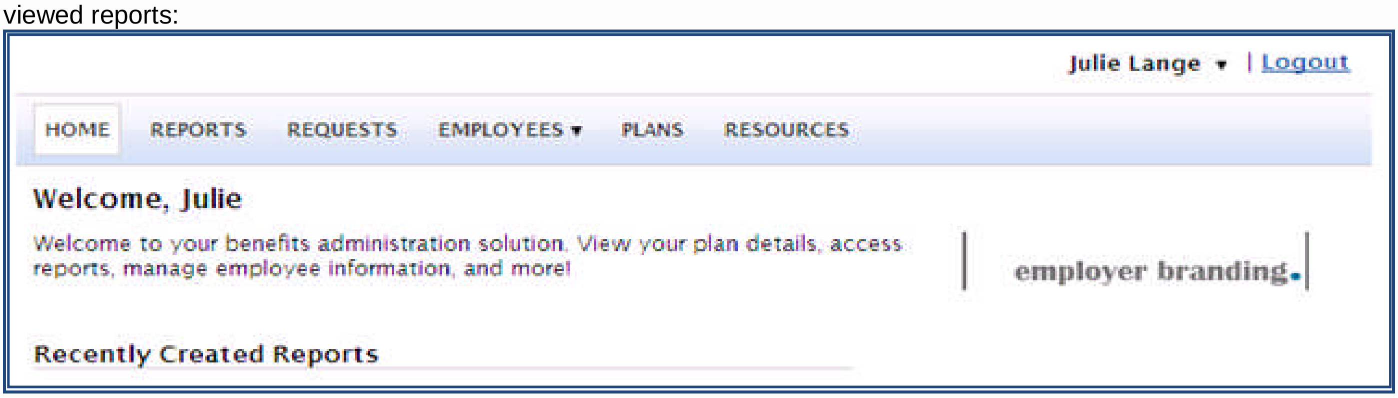
Employer Portal Guide

To access the Discovery Benefits Employer Portal: Open our website at www.discoverybenefits.com.

- Click the gray Login button in the upper right-hand corner of the screen.

Select the Employer Login – Reimbursement Account. Input your username and password.

Below is the screen you will see once you have successfully logged in. The Home tab will also reflect your most recently viewed reports:



The Reports tab will navigate you to your reporting information detail as applicable to your plan(s).

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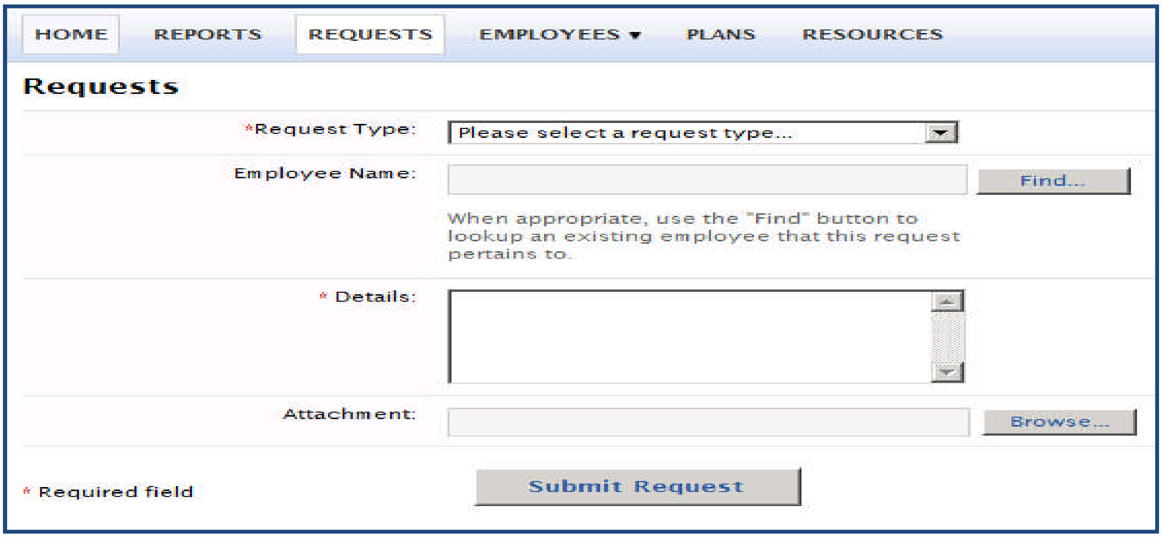
Notice the third tab called Requests.



Use the Requests tab for the following:

Uploading an Enrollment/Changes File

Most efficient method for communicating changes

Request Type – select "Other."
Participant Name – please skip this field.
Request Details – insert the effective date(s) of the changes and/or updates.
Attachment – select the Browse to locate the enrollment/changes file on your desktop.
Select Submit.

Uploading a Payroll File (*Please disregard if the plan design you have chosen does not require a payroll file)*
Request Type – select "Process a contribution file."
Participant Name – please skip this field.
Request Details – insert the benefit deduction date.
Attachment – select the Browse to locate the payroll file on your desktop.
Select Submit.

- Providing and sending payroll files to Discovery Benefits is the employer's responsibility. It is important that Discovery Benefits receives these files 2-4 days prior to every pay date. If we do not receive the files, we cannot post deductions to participants accounts, which can negatively effect reimbursement for participants.

Communicating Changes/Updates
Missing information will delay processing
Request Type – please select the choice that relates the most to your change/update.
Participant Name – please skip this field or select the participant you are requesting the change for.
Request Details – insert the general information you are requesting and include the effective date of this change/update.
Attachment – select the Browse to locate the necessary form on your desktop.
Select Submit.

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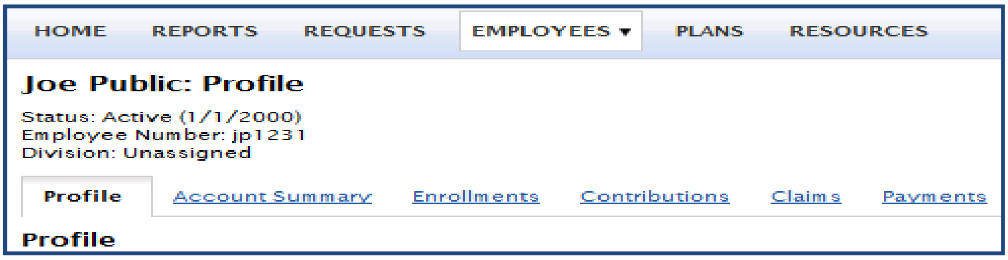
The next tab labeled Employees offers enhanced viewing to navigate through a specific participant's account.



Options under a specific viewing of an employee's Profile:

Profile – provides the participant's demographics and dependent information.

Account Summary– provides the participant view of Active accounts and Previous accounts. Plan rules appear in a dialog box when Account links are selected.

Enrollments – displays Active and Previous account information, a Total Contributions column and a Payroll Deduction estimate.

Contributions – provides scheduled payroll deductions and employer contributions. Allows functionality to filter by plan type Contribution type, and status (posted, scheduled, and cancelled).

Claims – provides participant claim detail and history.

Payments – provides participant payment history. Allows functionality to view extended details for repayments.

The Plans tab will navigate you an overview description of the varying plan types offered by the employer.

The Resources tab houses all forms that are applicable to the plan(s) offered by the employer. Simply select the appropriate form to download and print a full copy.