

EMPLOYER PORTAL QUICKSTART GUIDE



Welcome to TotalBen 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 Commuter Benefits Account.

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
- Access history of reports and notifications
- Load data import files
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Access history of reports and notifications
- Submit service requests
- Add, update and enroll employees

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HOW DO I GET ACCESS TO THIS PORTAL?

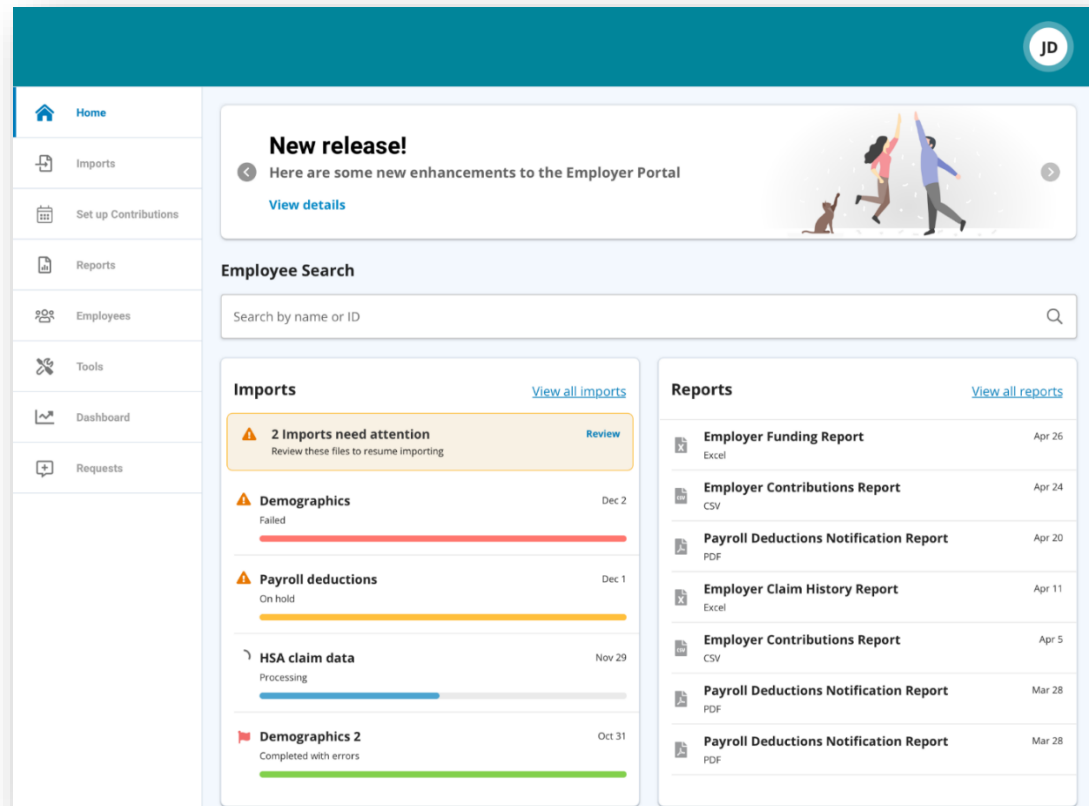
1. You and your assigned contacts will be sent a username and a temporary password.
2. Upon first login, you will be prompted to change the password.
3. Once password is updated and confirmed, click **Login**

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

Once log on, everything you need to efficiently and effectively manage your Commuter Benefits Account is found on the home page. From the home page, you can:

- View employee-level data
- Review recent reports
- Log service requests

You can also access the tabs on the left side of the page for easy navigation.



The screenshot displays the Employer Portal Home Page. At the top right, a user profile icon shows the initials 'JD'. A left-hand navigation menu includes links for Home, Imports, Set up Contributions, Reports, Employees, Tools, Dashboard, and Requests. The main content area features a 'New release!' banner with a 'View details' link. Below this is an 'Employee Search' section with a search bar. The 'Imports' section contains four items: '2 Imports need attention' (Review), 'Demographics' (Failed, Dec 2), 'Payroll deductions' (On hold, Dec 1), and 'HSA claim data' (Processing, Nov 29). The 'Reports' section lists several reports with their respective dates and formats: 'Employer Funding Report' (Excel, Apr 26), 'Employer Contributions Report' (CSV, Apr 24), 'Payroll Deductions Notification Report' (PDF, Apr 20), 'Employer Claim History Report' (Excel, Apr 11), 'Employer Contributions Report' (CSV, Apr 5), 'Payroll Deductions Notification Report' (PDF, Mar 28), and another 'Payroll Deductions Notification Report' (PDF, Mar 28).

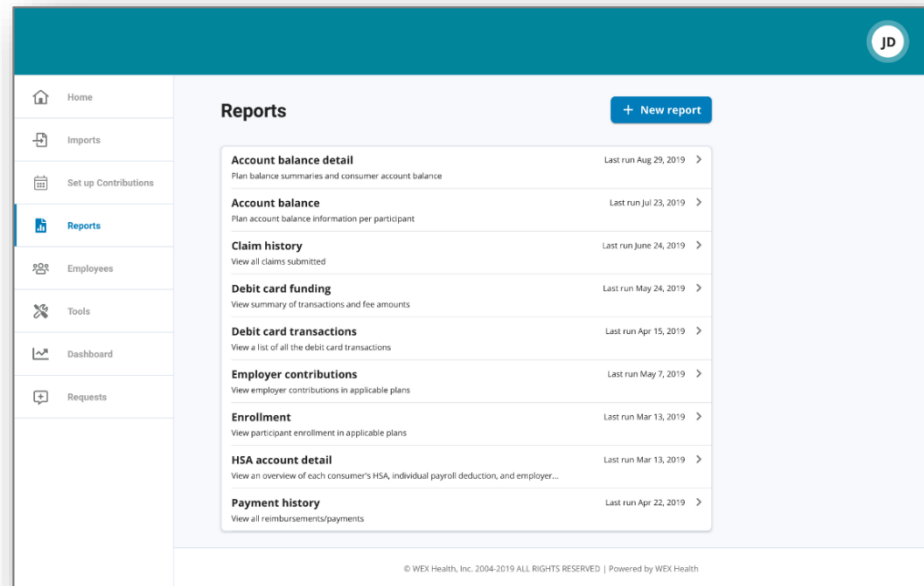
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HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. Select the **Reports** tab,
2. 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 TotalBen to request it.

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

1. Select the **Reports** Tab.
2. Click the New Report button.
3. Select the appropriate report type.
4. Complete the report detail fields.
5. Click **Request**.
6. The report will generate. If you selected the option an email is sent to you when the report is available.



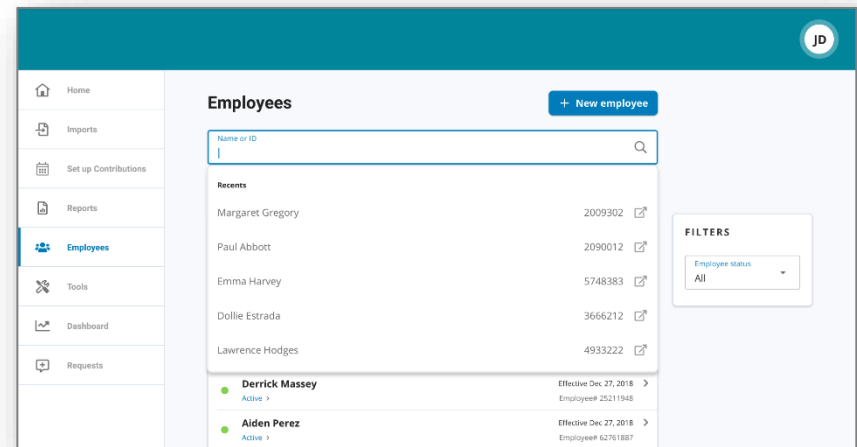
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WHAT KIND OF EMPLOYEE-LEVEL DATA CAN I ACCESS?

1. Select the **Employees** tab, you can get real-time data on all 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. Summary
 - b. Enrollments
 - d. Activity
 - e. Claims + Payments
 - f. Enrollments
 - g. Contributions

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

1. Select the **Requests** tab.
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.



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

1. Under the **Tools** tab, you will find options to view the same **Plans** info as the employees for all active and inactive plans.
2. Support resources available here are:
 - Links
 - Plan Details, summaries, and Rules
 - Resource documents

WHERE WOULD I ACCESS REQUIRED FORMS?

1. Under the **Tools** tab and the **Resources** tile.
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. Click the **New Employee** button.
3. Enter the Personal and Employment Information.
4. Click **Add New Employee**.
5. Select the **Enrollments** link.
6. Click **New Enrollment**.
7. Select the **Plan Year** and click **Next**.
8. Select one or more of the plans listed and click **Next**.
9. Select the **Primary Payment Method** and click **Next**.
10. Complete the enrollment **Plan Details** for each plan listed and click **Submit**.

