Paychex Benefit Account Employer Web User Guide

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The Paychex Benefit Account Employer Portal

The Employer Portal is a powerful and easy-to-use self-service solution that gives you the tools to understand and manage the activity for your company's benefit plans. Simply log in to the portal and you will be able to:

- Access a wide variety of reports
- Review current and previous reports
- Review participant information
- Enroll employees
- Use the information on the website to answer employee questions 24/7.

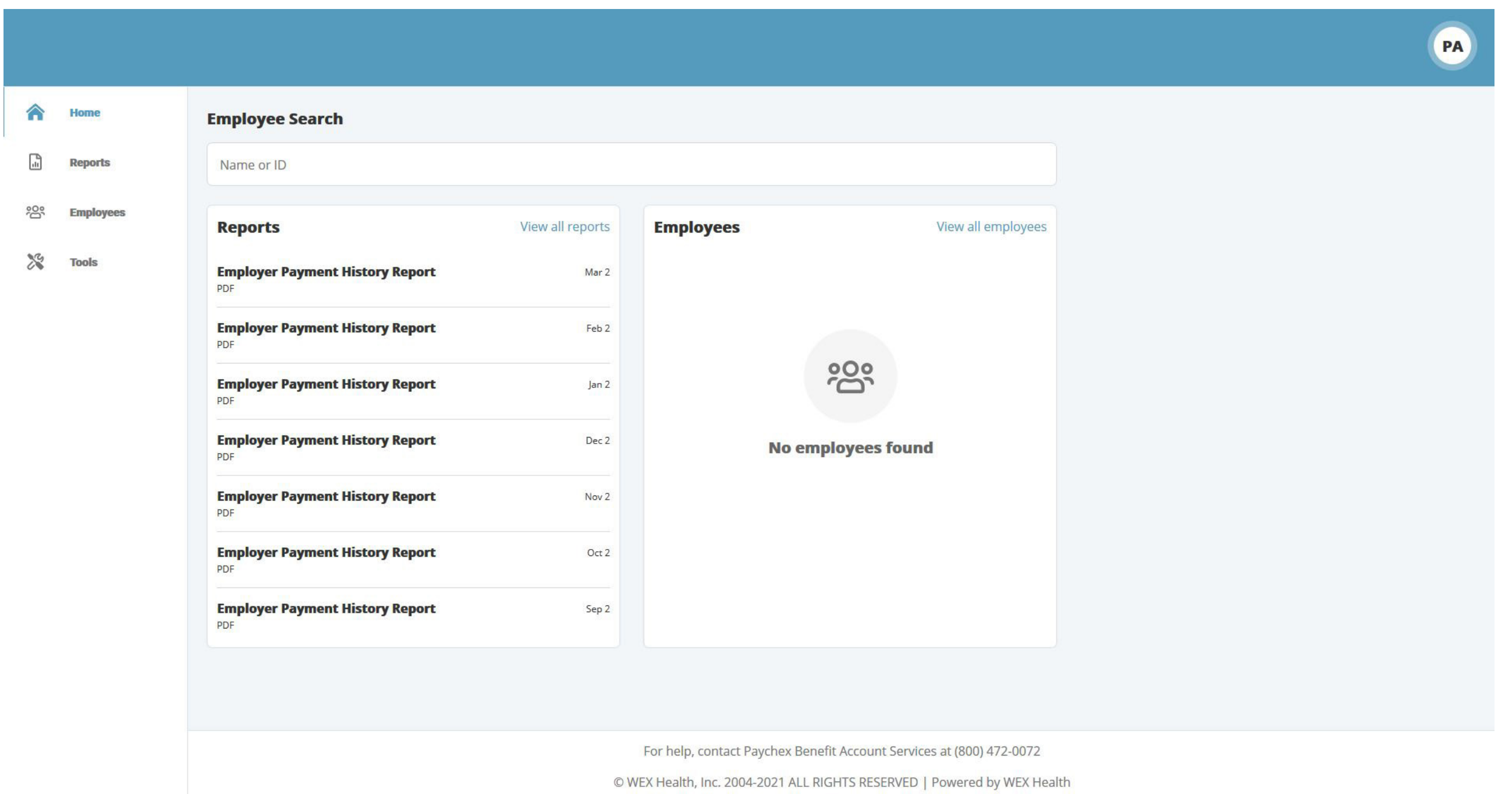
When you log in to https:// www.paychex.com/login/, select the normal site you use such as PaychexFlex or MyPaychex. Once you select your site, you will see the link for Paychex Benefit Account (PBA) on the left navigation bar. Click the link to access your PBA account.

You Have Successfully Logged in the Employer Portal for the First Time

At the top of the screen, click the tabs to access:

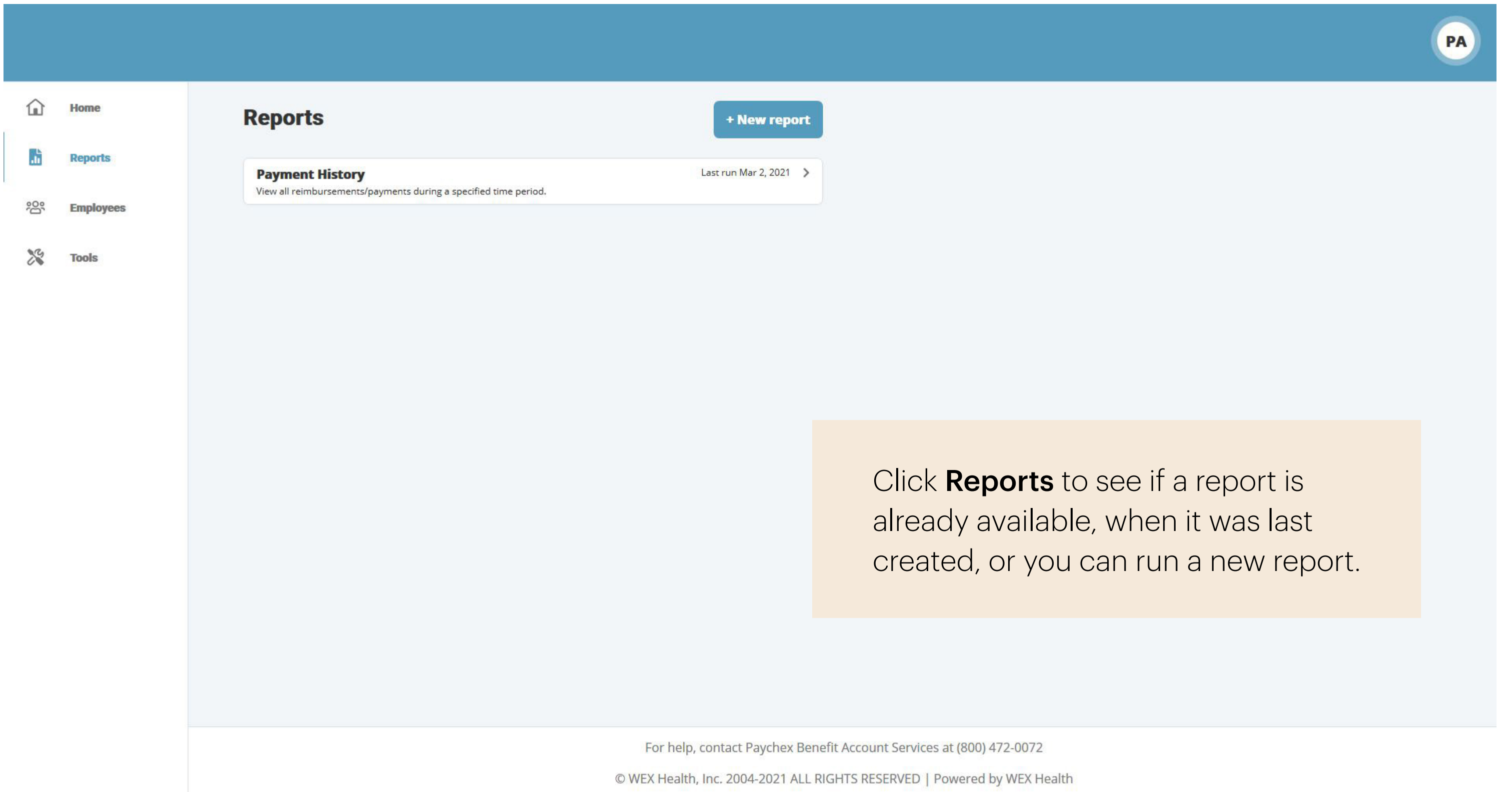
- **Reports** – Available plan level reports to run on demand and a history of all reporting for each category
- **Employees** –Review your employees' account details
- **Plans** – details the plan(s) that your company offers for current and previous years.
- **Resources** –a list of forms that are pertinent to your plan
- **Links** – A list of helpful links and Employee Guides to assist with plan administration.

The rest of the screen gives you a summary of your recent activity.

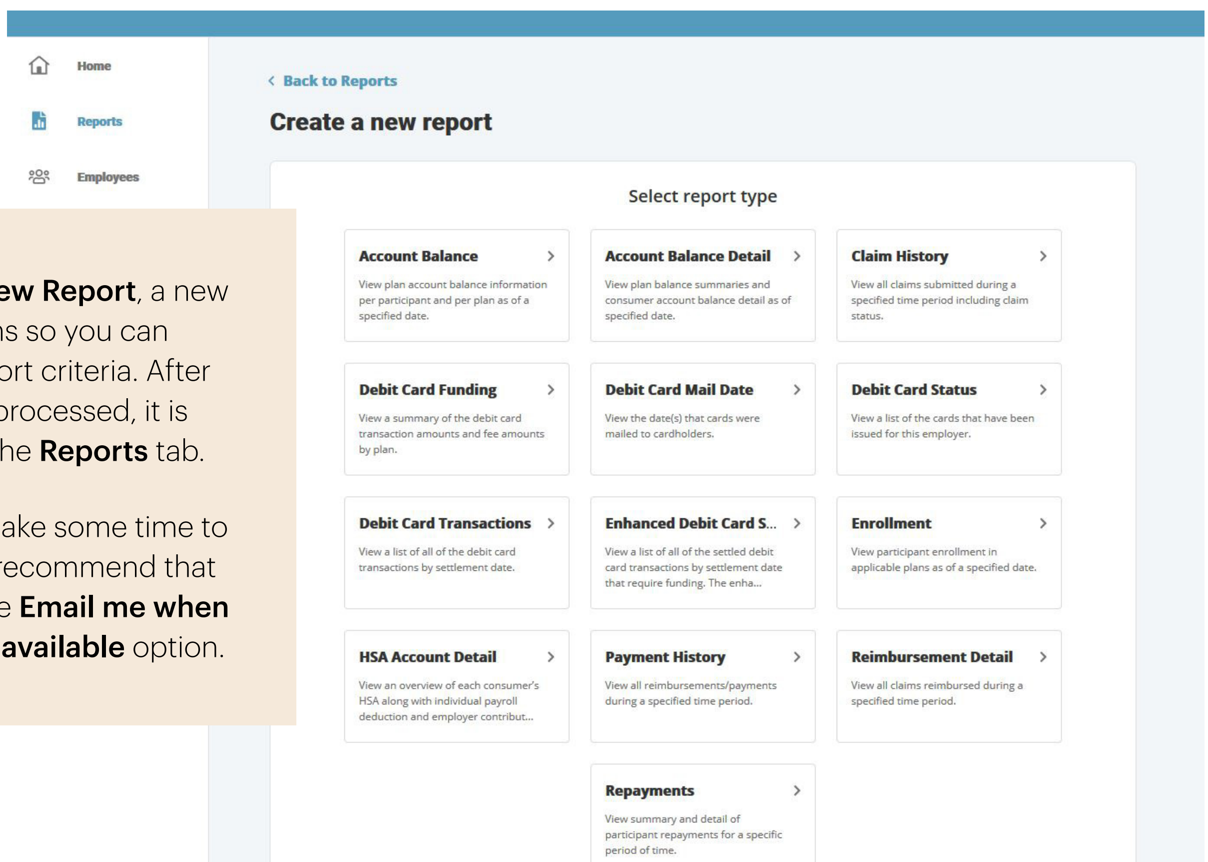


Reports Tab

When you click Reports, you can access, view, and run the following reports:



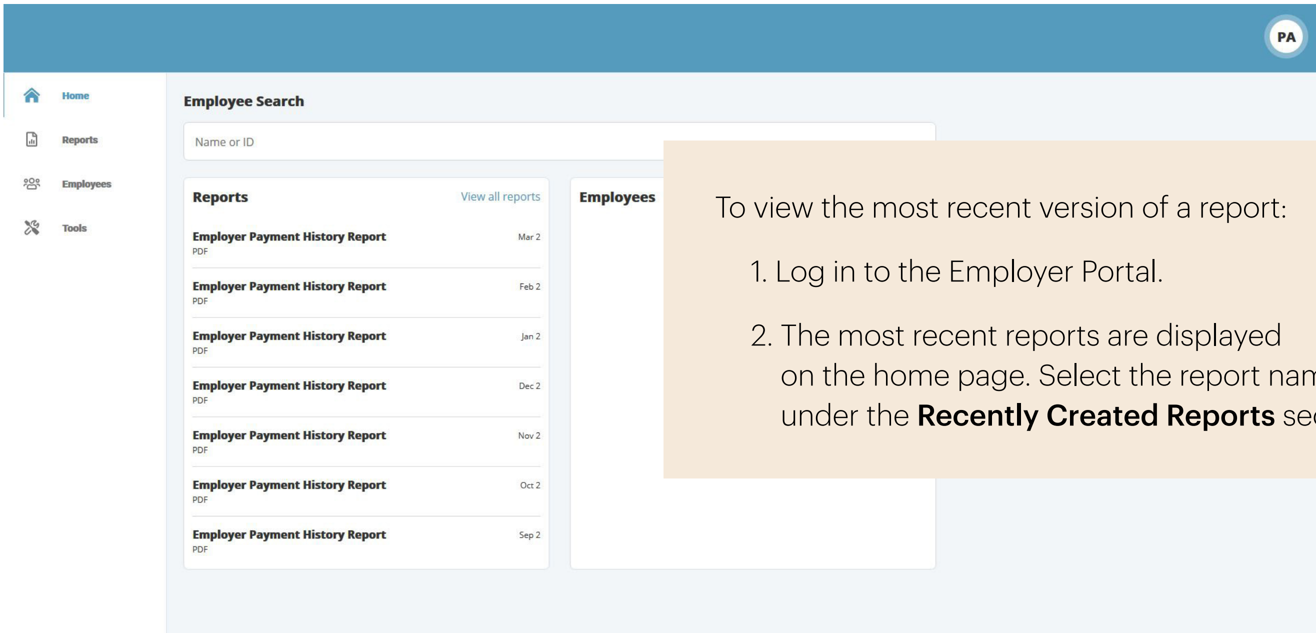
Click **Reports** to see if a report is already available, when it was last created, or you can run a new report.



If you click **New Report**, a new window opens so you can enter the report criteria. After the report is processed, it is available on the **Reports** tab.

Reports can take some time to process. We recommend that you check the **Email me when the report is available** option.

Viewing Recent Reports

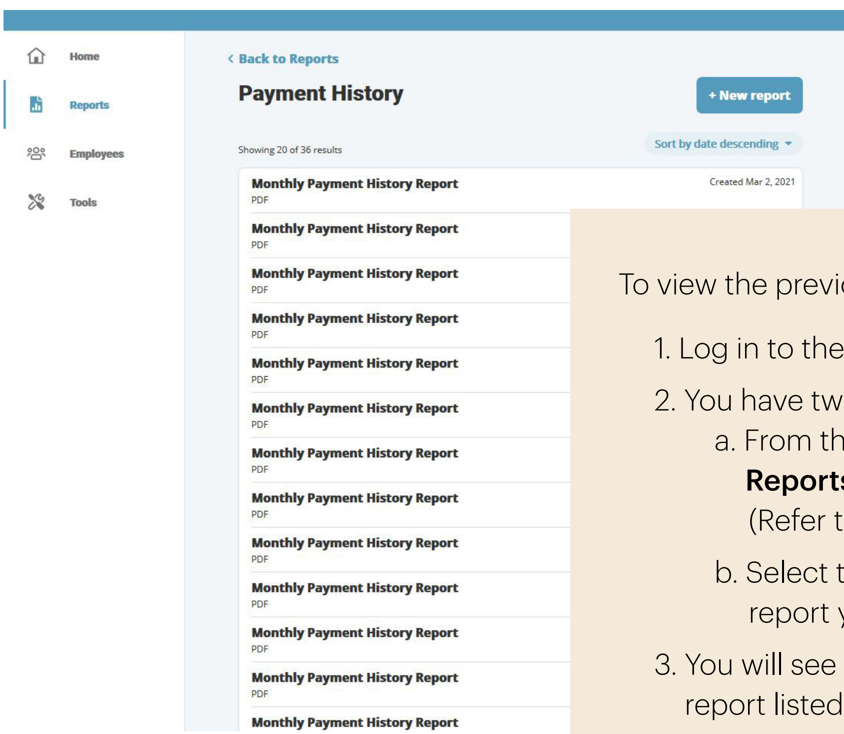


To view the most recent version of a report:

1. Log in to the Employer Portal.
2. The most recent reports are displayed on the home page. Select the report name under the **Recently Created Reports** section.

Note: The report launches in a new browser window.

History of Reports



To view the previous versions of a report:

1. Log in to the **Employer Portal**.
2. You have two options to view a history of all the reports:
   a. From the home page, select **View All** under **Recent Reports** for the report you would like to view. (Refer to page 4)
   b. Select the **Reports** tab, then select the name of the report you would like to view.
3. You will see a list of all of the reports with the most recent report listed first.
4. Select the report you would like to view. You may sort the reports by clicking on the column headers.

Note: The report launches in a new browser window.

The following reports post to the PBA Employer Web Portal automatically on the **second of every month**:

- Monthly Account Balance Report
- Monthly Enrollment Report
- Monthly Payment History Report
- Monthly Repayments Report

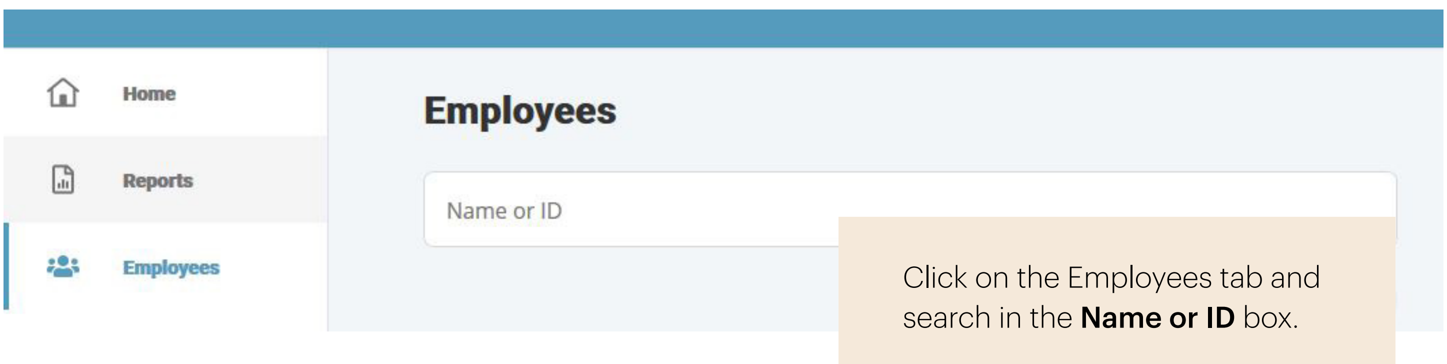
The following reports will be posted to the PBA Employer Web Portal **as transactions occur**:

- Employer Funding Notification
- Termination Notification
- Reimbursement Notification

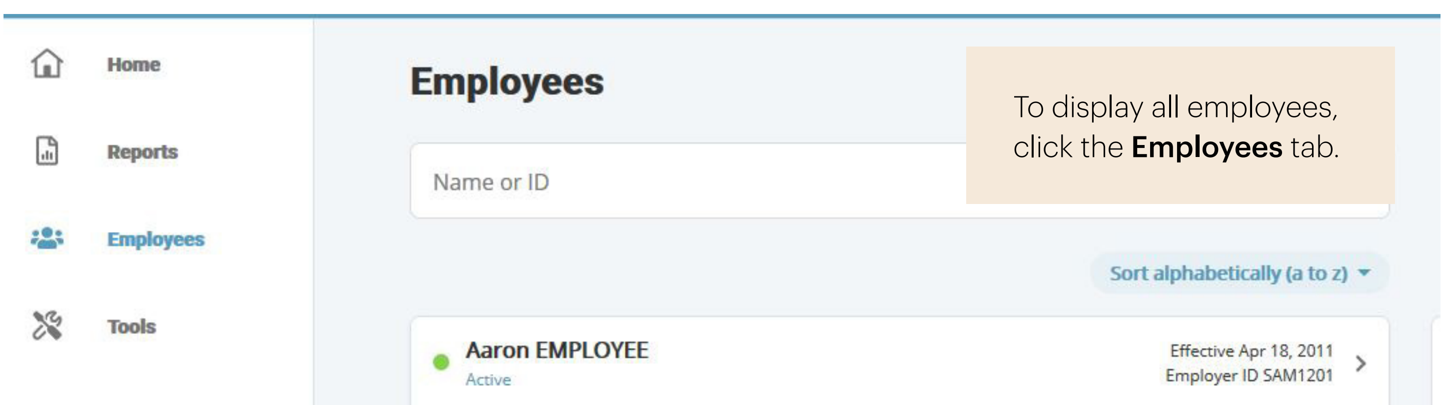
Employees Tab

The PBA Employer Portal gives you expanded capabilities with viewing and updating employee information.

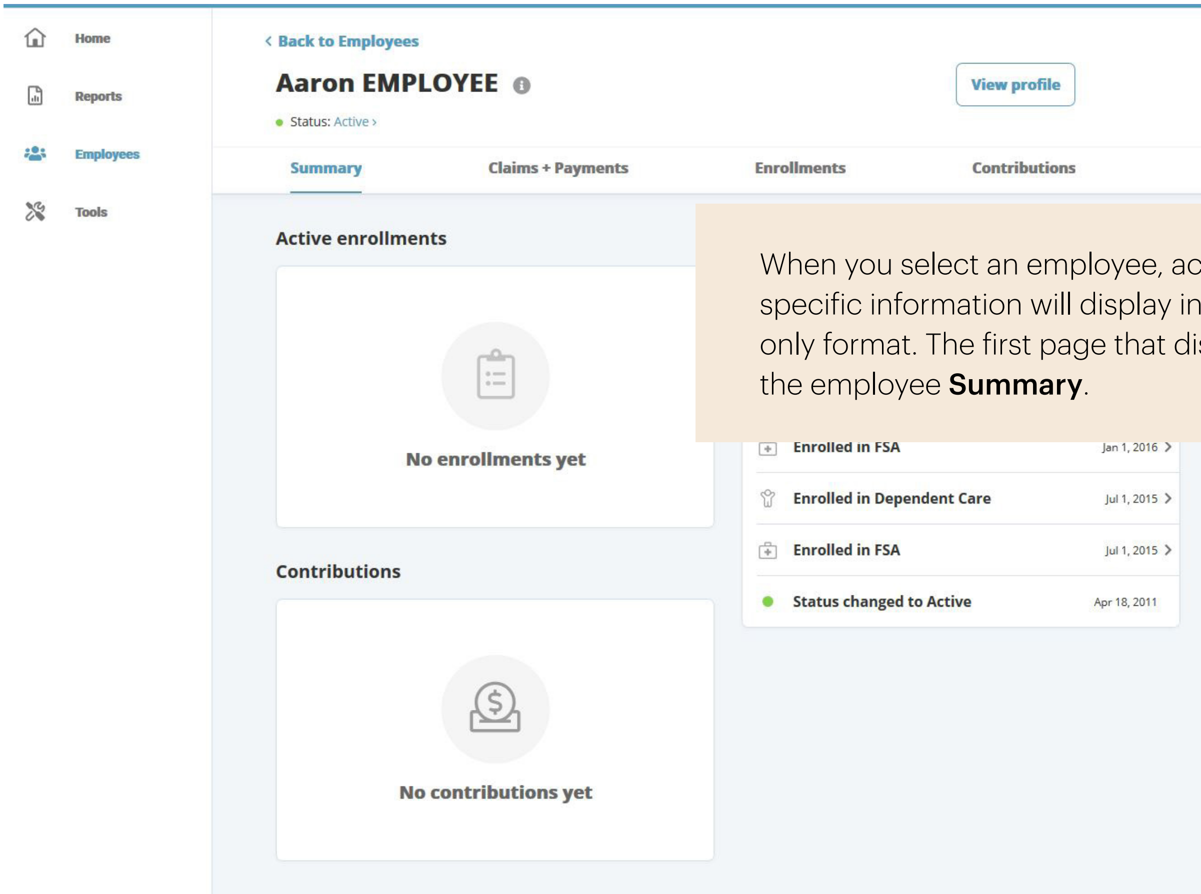
View One Employee



View All Employees

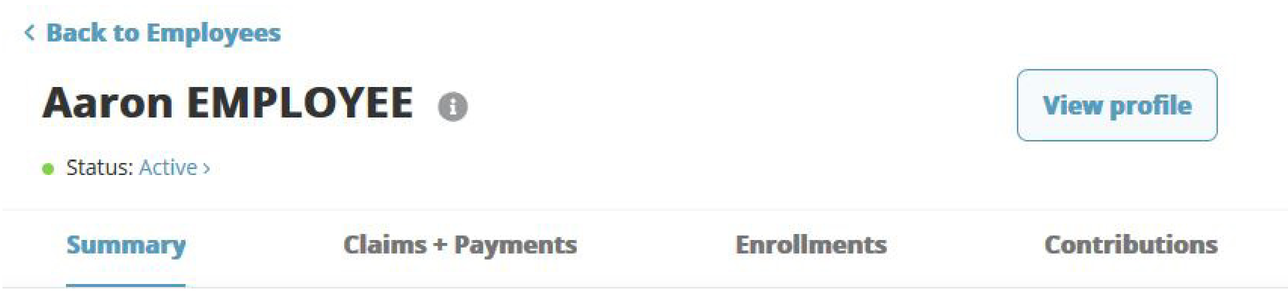


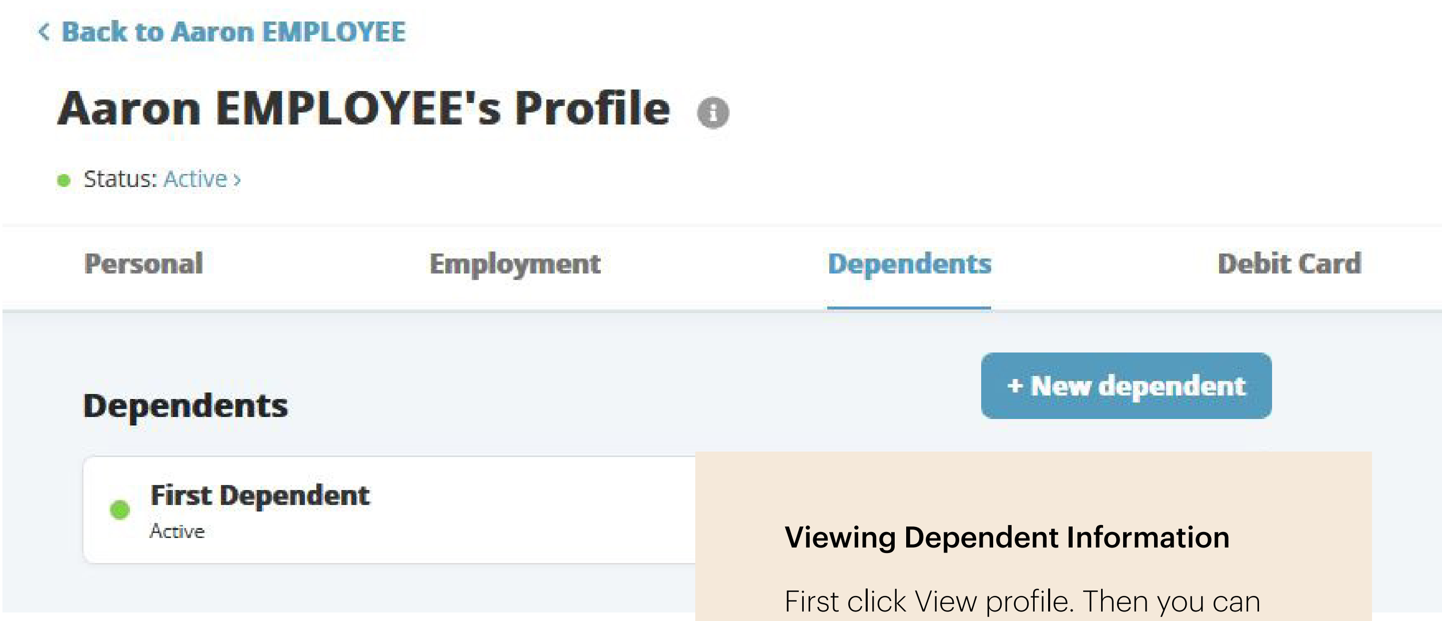
View Employee Specific Information



When you select an employee, account – specific information will display in a view only format. The first page that displays is the employee **Summary**.

View Dependent Information



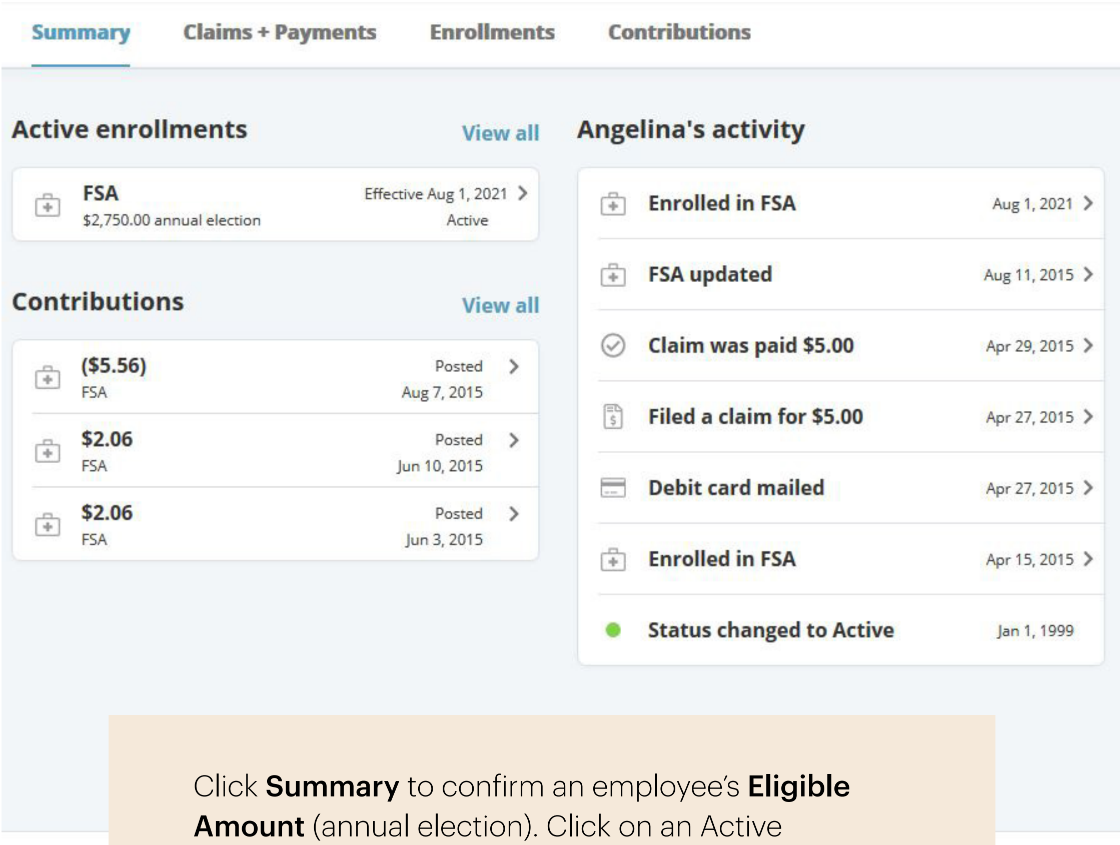


Viewing Dependent Information

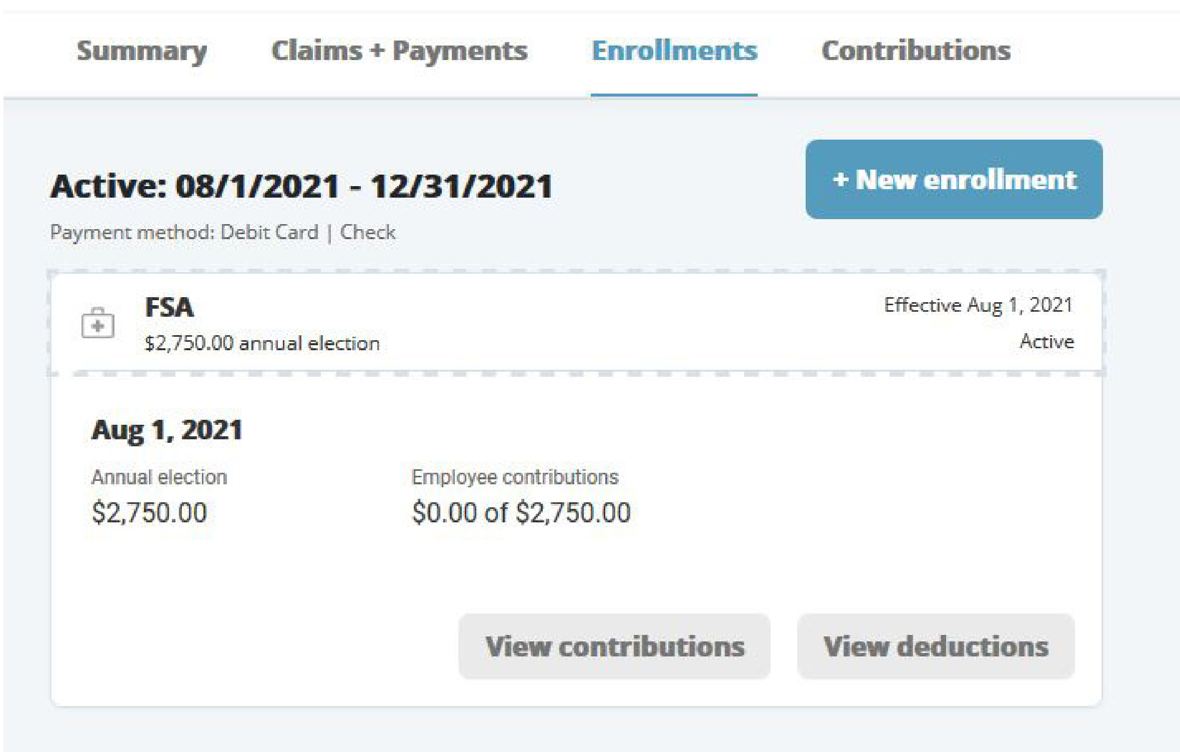
First click View profile. Then you can click the dependent tab to view any dependents the participant has listed or **Add Dependent** information, if necessary.

Important: To submit a claim to for anyone other than the participant, the dependent information must be included on the participant's account.

View Summary Screen

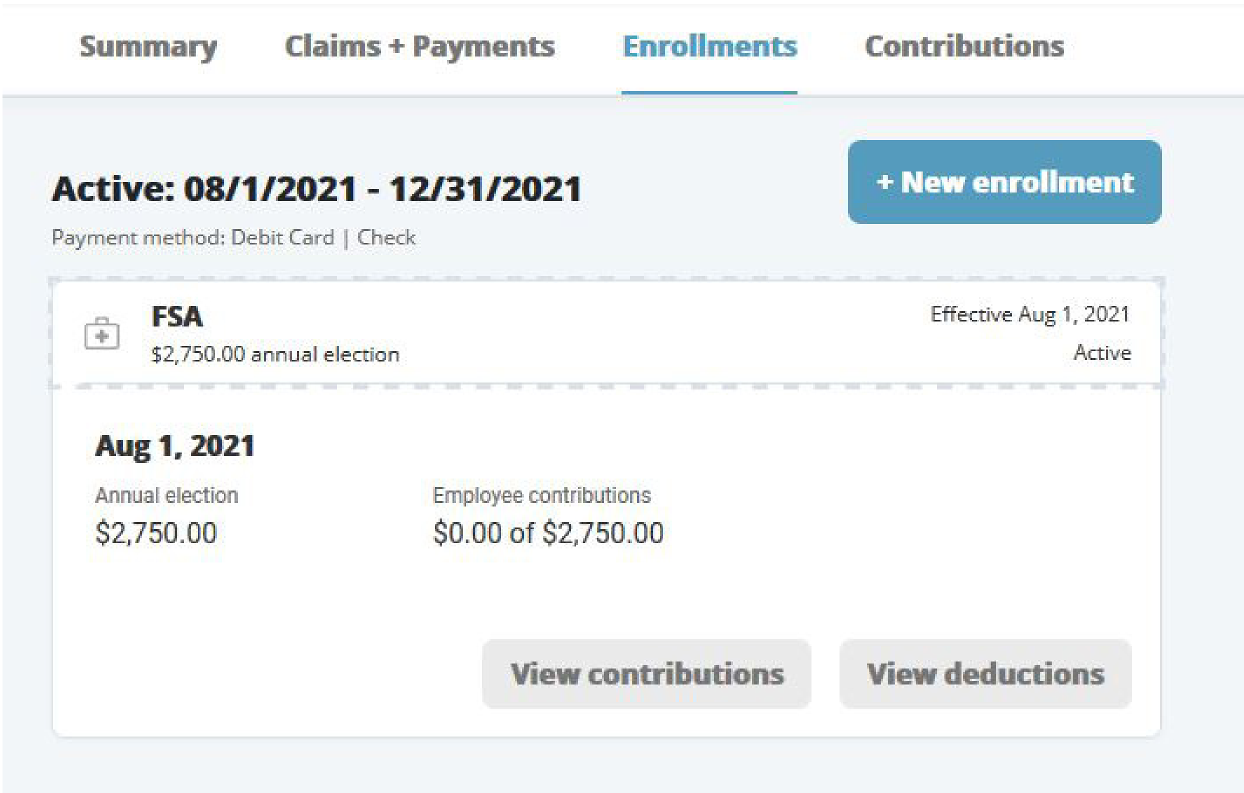


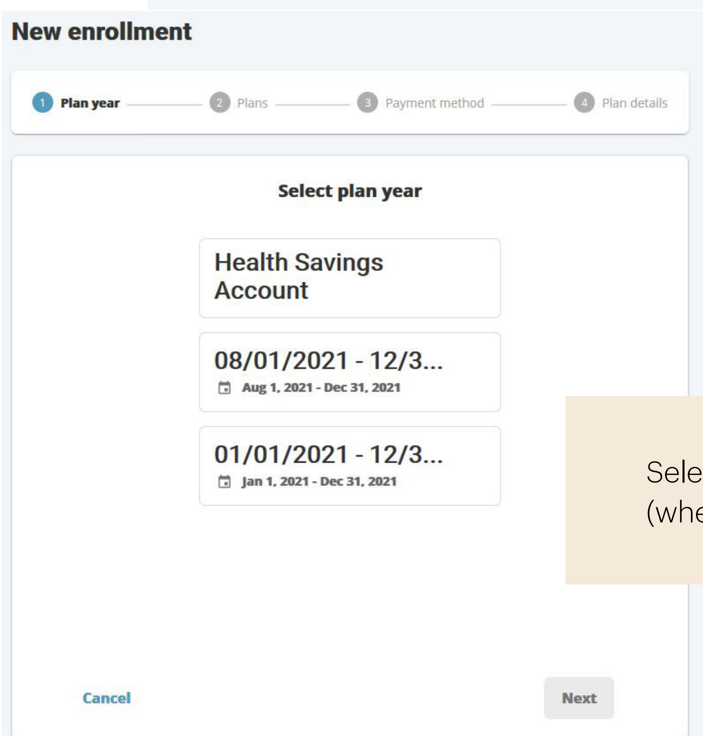
Click **Summary** to confirm an employee's **Eligible Amount** (annual election). Click on an Active Enrollment to view contribution and deduction details.



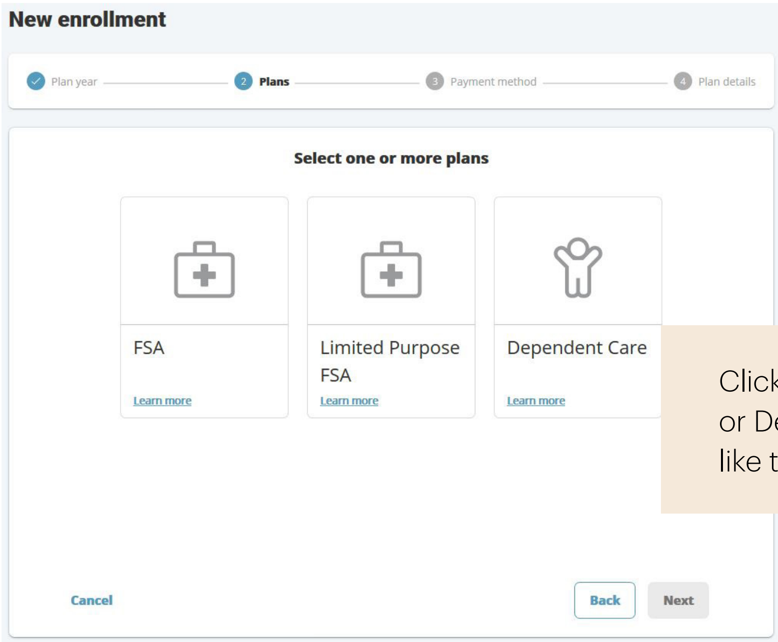
Enrolling Employees for the First Time

You can enroll employees for the first time on the Employer portal by selecting the **Employees** tab and clicking the employee you want to enroll. Then click **New Enrollment**.



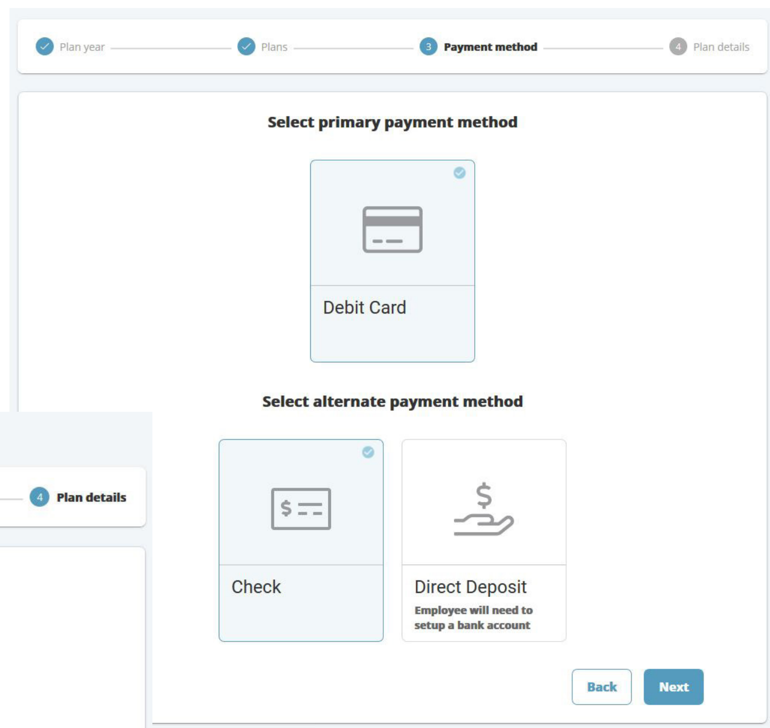


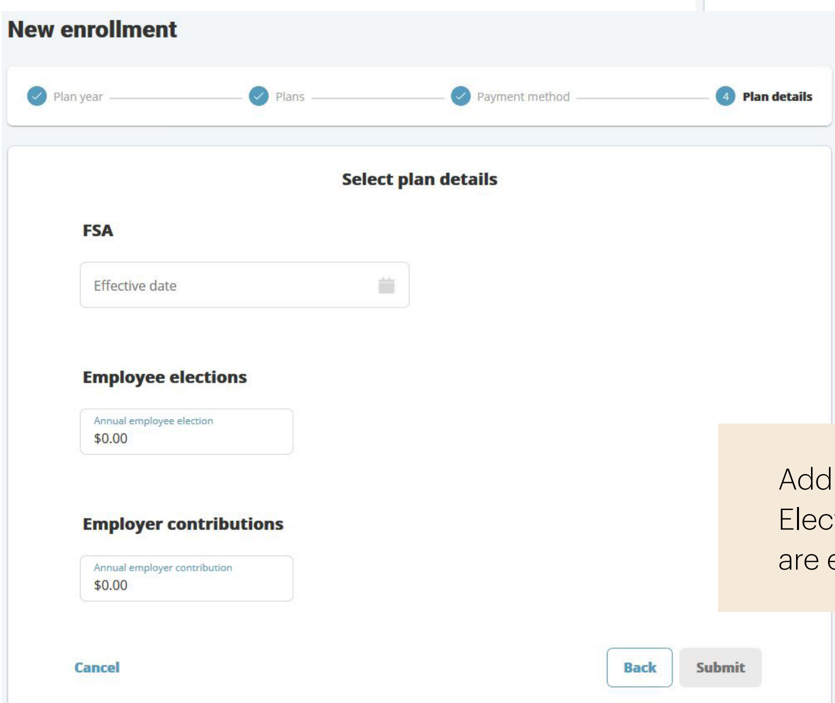
Select **Plan Year or Health Savings Account** (when applicable).



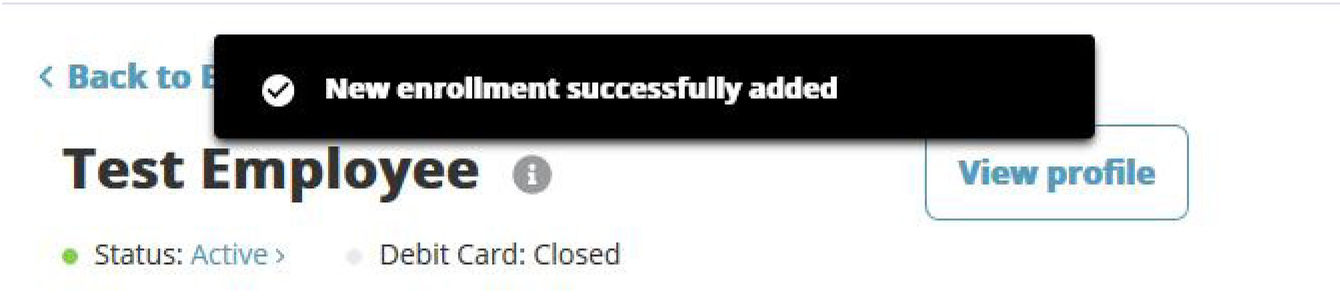
Click the plan (FSA, Limited FSA, or Dependent Care) you would like to enroll the employee in.

Select the employee's primary and alternate payment method.





Add the employee's Effective Date and Election. Once all employee enrollments are entered in this screen, **click Submit**.



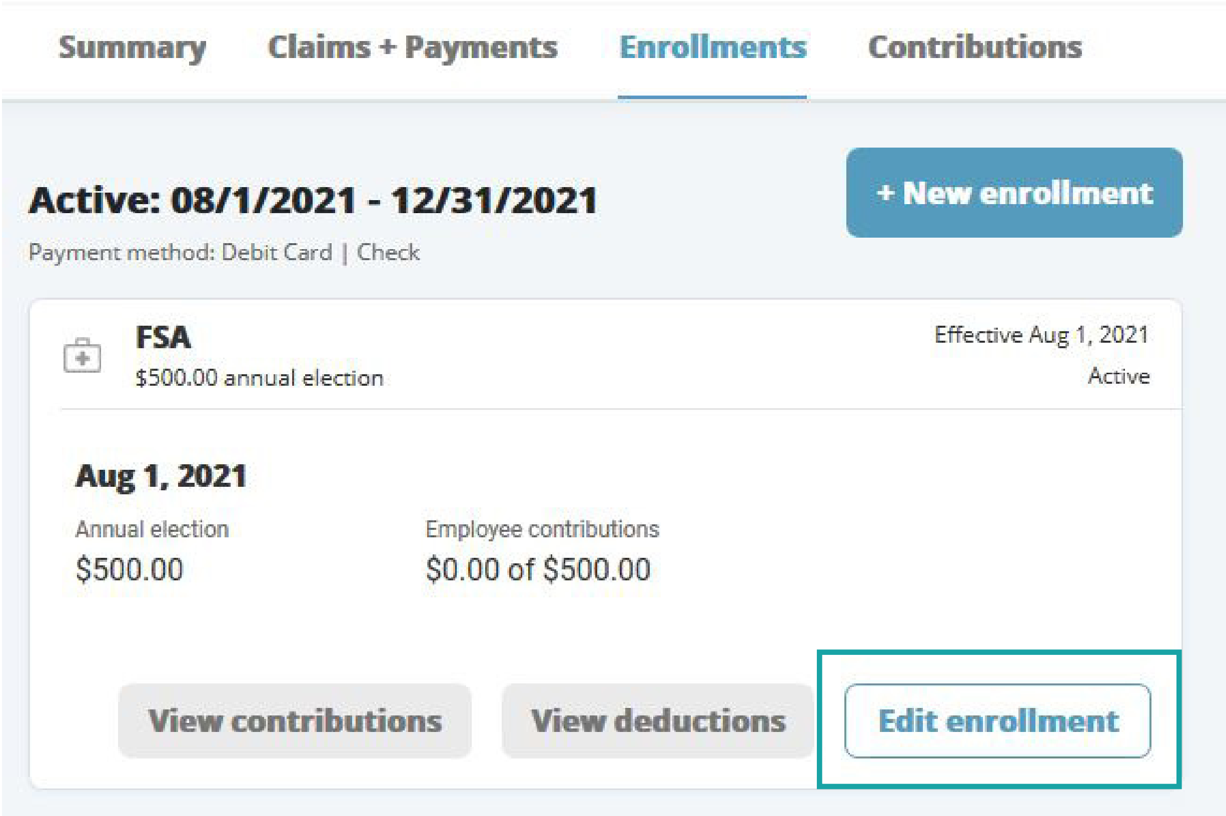
If the enrollment is successful you will receive this confirmation.

Making Enrollment Changes

You can make changes to employee FSA plans online. Although the website will allow you to make changes at any time, you should only make changes to enrolled employees during the year if they have a qualifying event.

- Dependent care cost provider changes
- Dependent satisfies or ceases to satisfy dependent eligibility requirements
- Birth/Death of spouse or dependent, adoption or placement for adoption
- Spouse's employment commenced/terminated
- Status change from full-time to part-time or vice versa by employee or spouse*
- Eligibility or Ineligibility of Medicare/Medicaid
- Change from salaried to hourly or vice versa*
- Marriage/Divorce/Legal Separation
- Unpaid leave of absence by employee or spouse
- Return from unpaid leave of absence by employee or spouse

Note: You can only change the **Annual Election** to what has been contributed to date. If there have been any contributions, you can't make the amount $0.00



Click the **Enrollments** tab, **Edit Enrollment** to make enrollment changes for an employee. This screen also displays **Employer Contributions**.

How to Answer Employee Questions

Employee Data

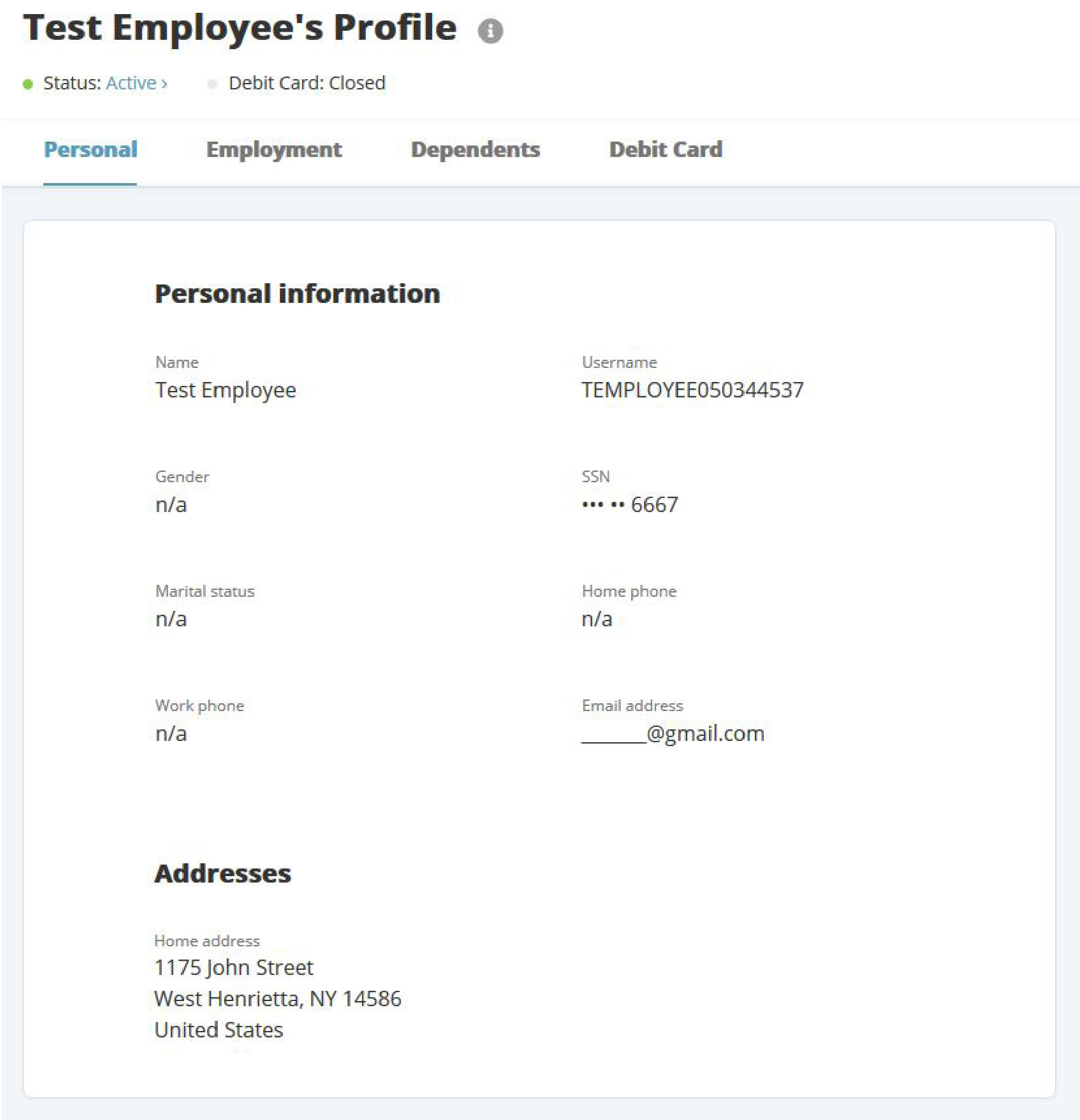
You can view real-time data at an employee level to address your employees' questions. You can search for employees using:

- First name,
- Last name,
- Employer Employee ID number,
- Employment Status, and
- Select an employee from a list of all employees.

Once you have accessed an employee's account, you can view the following:

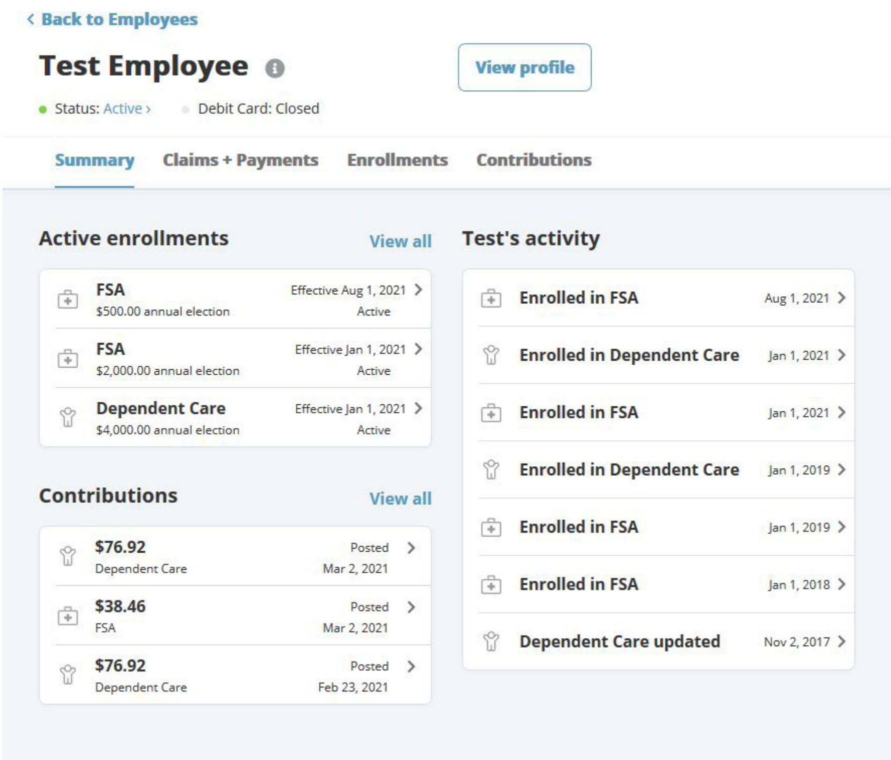
Profile

You can view real-time data at an employee level to address your employees' questions. You can search for employees using:



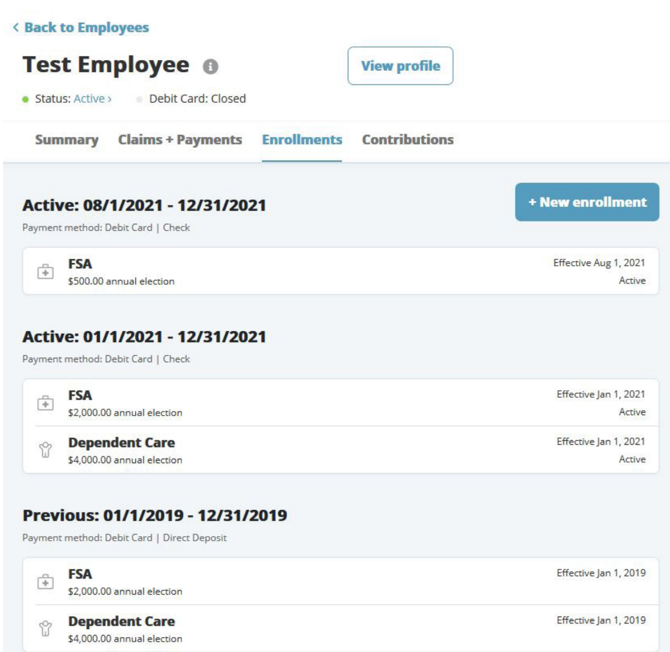
Account Summary

Provides an overview of an employee's active plan(s) by displaying the eligible amount for the effective enrollment total, and contributions. If the employee had a previous year account, this information would display in the 'Enrollments' section.



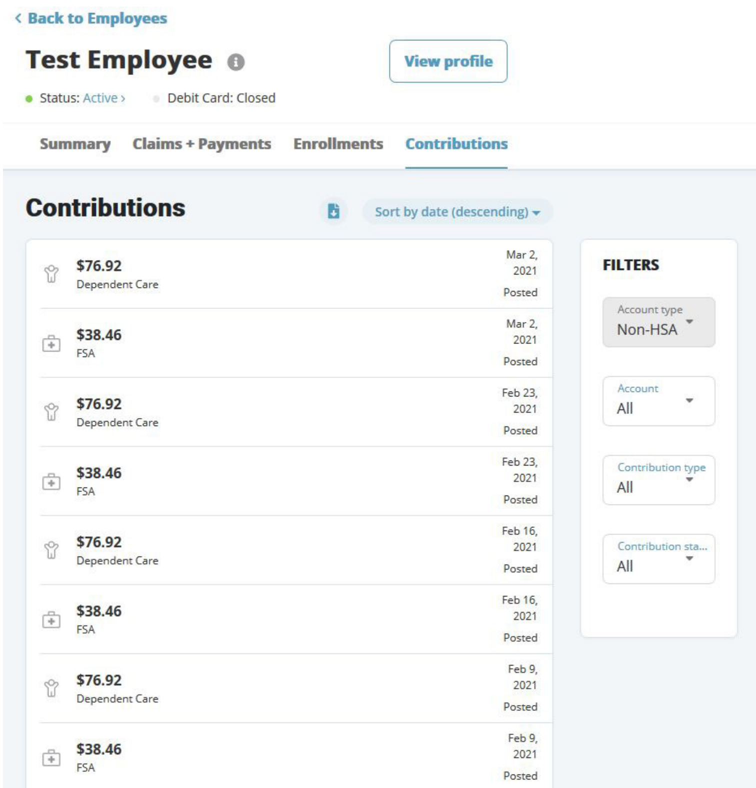
Enrollments

Allows you to review an employee's current and past enrollment information, including the effective date, employer contribution, and contributions-to-date.



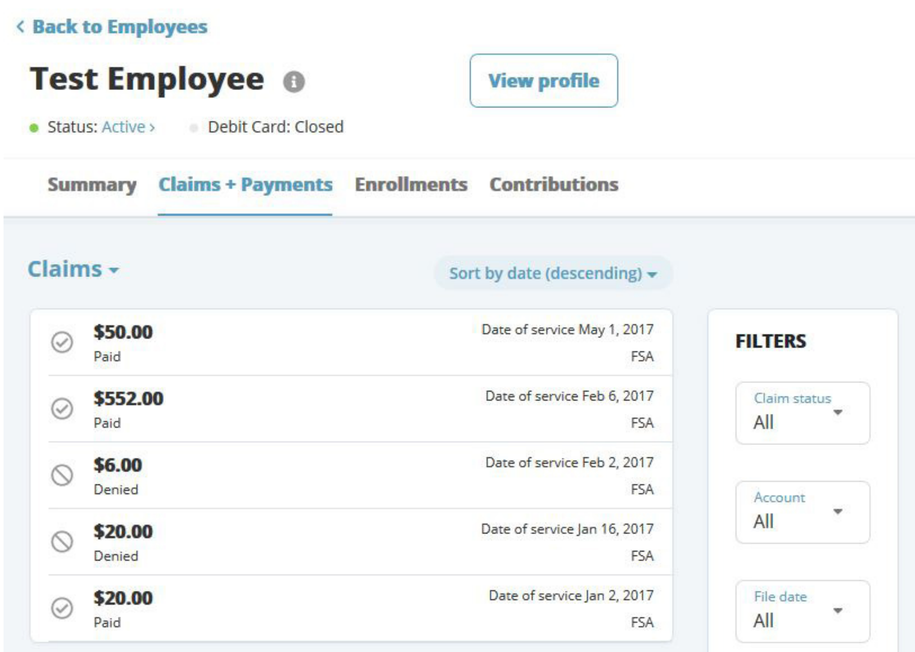
Contributions

Displays the per-pay-period contributions for an employee.



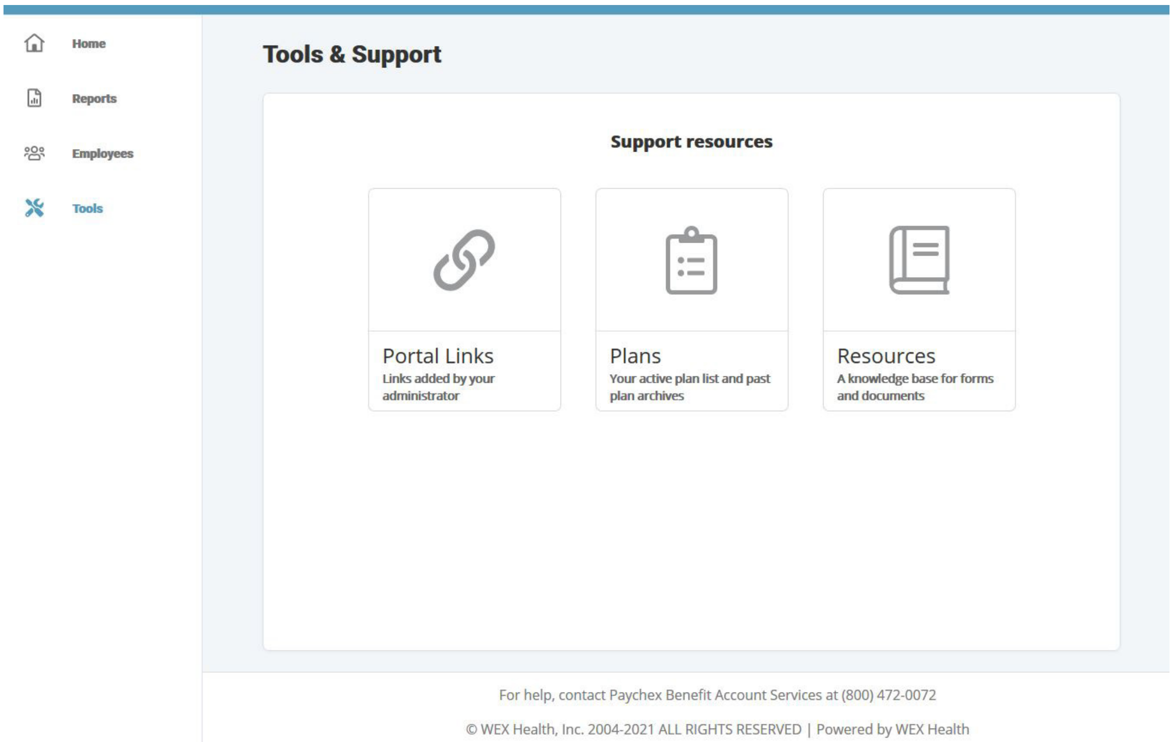
Claims + Payments

Access the complete history of an employee's claims, with the ability to filter information on the account by the date the claim was submitted or the method by which it was filed. Claim Information, including date submitted, date of service, account, claim status, receipt status, and claim amount broken down by paid, pending payment, and denied amounts allows you to answer questions without accessing protected health information (PHI).



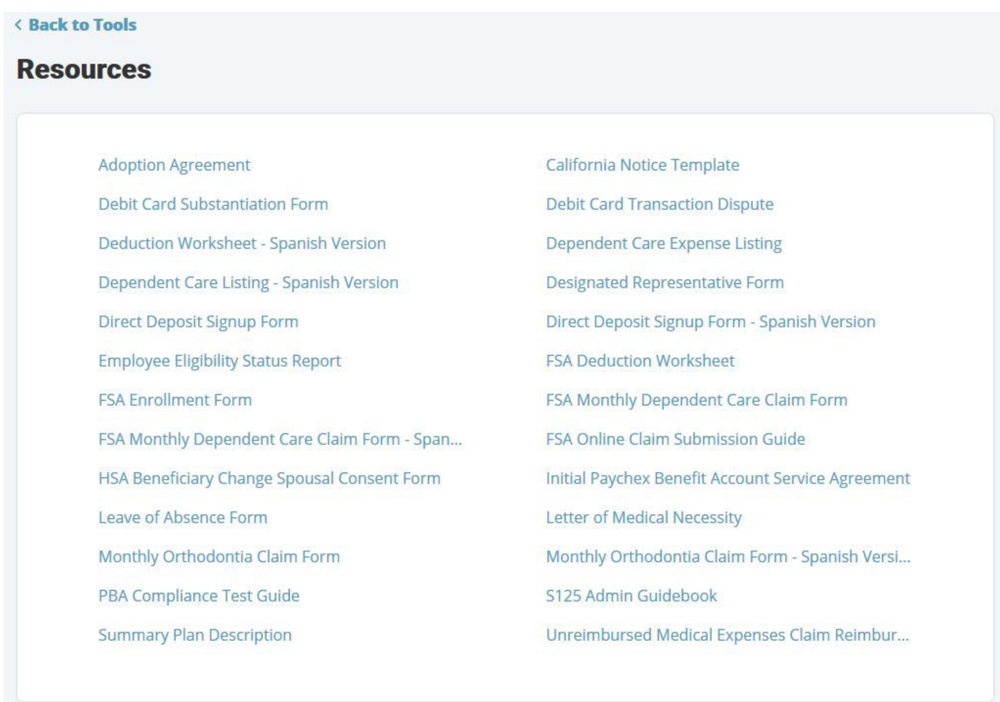
Tools

Click on the Tools Tab to view Portal Links, Plans, and Resources.



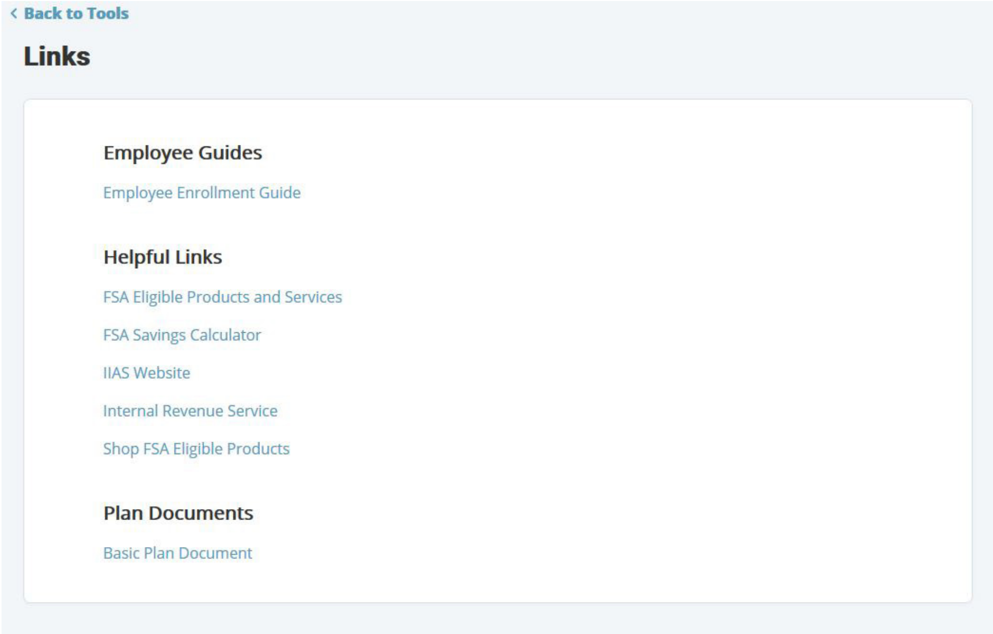
Resources

Click on the Tools Tab, then Resources. You can download and print any forms your employees may need.



Links

Click on the Links Tab to download and print any educational materials you or your employees may need.



Plans

Click on the Plans Tab to view active and previous plans.