

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/](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.

The screenshot displays the Employer Portal interface. At the top right, there is a circular profile icon labeled 'PA'. On the left side, a navigation menu includes 'Home', 'Reports', 'Employees', and 'Tools'. The main content area is titled 'Employee Search' and features a search input field labeled 'Name or ID'. Below the search field, there are two columns: 'Reports' and 'Employees'. The 'Reports' column lists seven 'Employer Payment History Report' PDFs with dates from Sep 2 to Mar 2. The 'Employees' column shows a message 'No employees found' with a person icon. At the bottom, there is a footer with contact information for Paychex Benefit Account Services and a copyright notice for WEX Health, Inc. 2004-2021.

Reports Tab

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

The screenshot shows the 'Reports' tab in a web application. On the left is a navigation menu with 'Home', 'Reports', 'Employees', and 'Tools'. The main content area is titled 'Reports' and features a '+ New report' button. Below this is a card for 'Payment History' with the description 'View all reimbursements/payments during a specified time period.' and 'Last run Mar 2, 2021'. A callout box on the right says: 'Click **Reports** to see if a report is already available, when it was last created, or you can run a new report.'

For help, contact Paychex Benefit Account Services at (800) 472-0072

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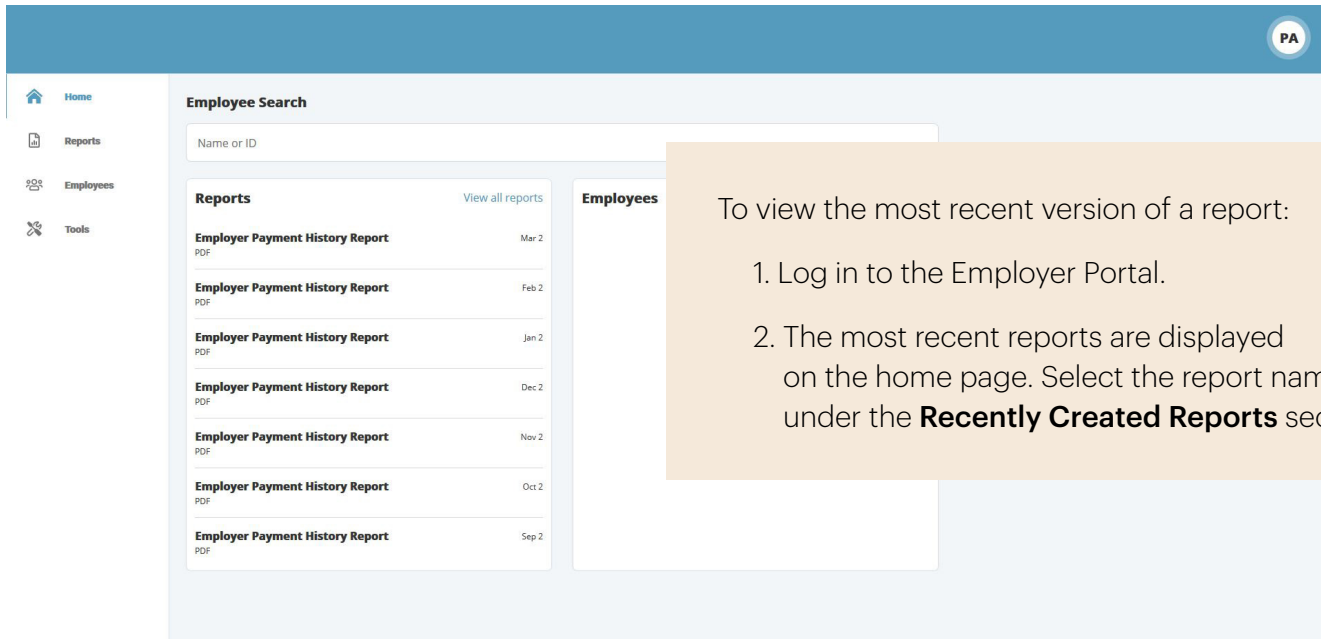
The screenshot shows the 'Create a new report' interface. It has a navigation menu on the left with 'Home', 'Reports', and 'Employees'. The main content area is titled 'Create a new report' and includes a '< Back to Reports' link. Below is a 'Select report type' section with a grid of report options:

- Account Balance**: View plan account balance information per participant and per plan as of a specified date.
- Account Balance Detail**: View plan balance summaries and consumer account balance detail as of specified date.
- Claim History**: View all claims submitted during a specified time period including claim status.
- Debit Card Funding**: View a summary of the debit card transaction amounts and fee amounts by plan.
- Debit Card Mail Date**: View the date(s) that cards were mailed to cardholders.
- Debit Card Status**: View a list of the cards that have been issued for this employer.
- Debit Card Transactions**: View a list of all of the debit card transactions by settlement date.
- Enhanced Debit Card S...**: View a list of all of the settled debit card transactions by settlement date that require funding. The enha...
- Enrollment**: View participant enrollment in applicable plans as of a specified date.
- HSA Account Detail**: View an overview of each consumer's HSA along with individual payroll deduction and employer contribut...
- Payment History**: View all reimbursements/payments during a specified time period.
- Reimbursement Detail**: View all claims reimbursed during a specified time period.
- Repayments**: View summary and detail of participant repayments for a specific period of time.

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.

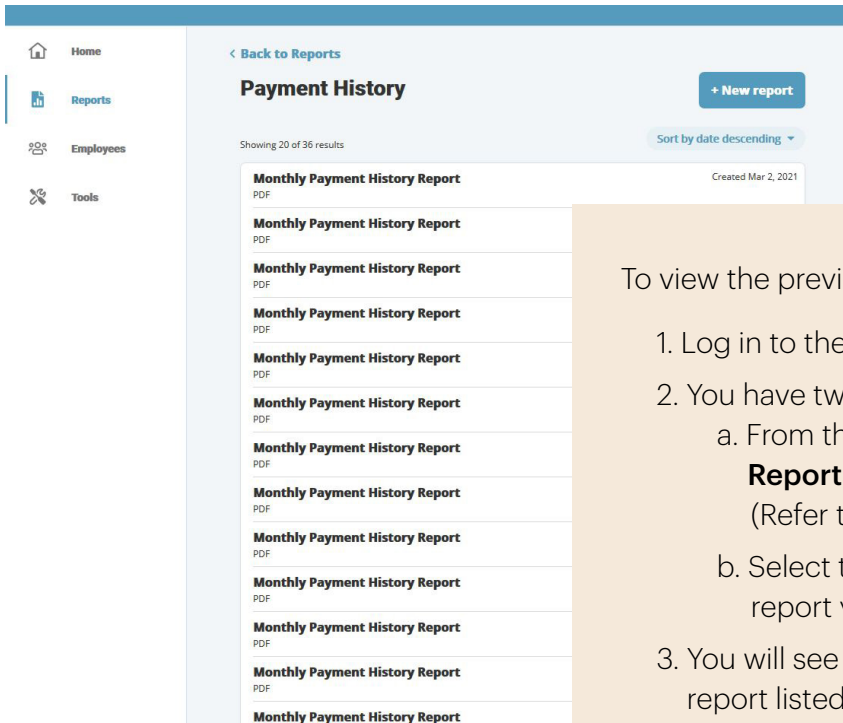
Reports can take some time to process. We recommend that you check the **Email me when the report is available** option.

Viewing Recent Reports



Note: The report launches in a new browser window.

History of Reports



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 Payment History Report
- Monthly Enrollment Report
- Monthly Repayments Report

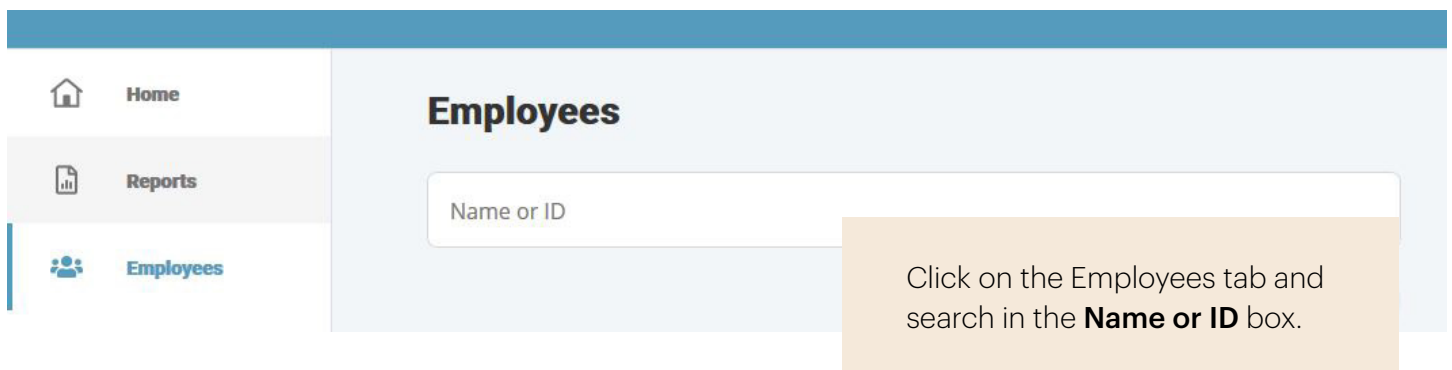
The following reports will be posted to the PBA Employer Web Portal **as transactions occur**:

- 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



Home

Reports

Employees

Employees

Click on the Employees tab and search in the **Name or ID** box.

View All Employees



Home

Reports

Employees

Tools

Employees

Sort alphabetically (a to z) ▾

● **Aaron EMPLOYEE**
Active

Effective Apr 18, 2011
Employer ID SAM1201 >

View Employee Specific Information

[Home](#) | [Reports](#) | **Employees** | [Tools](#)

[Back to Employees](#)

Aaron EMPLOYEE ⓘ

Status: Active >

[View profile](#)

Summary | Claims + Payments | Enrollments | Contributions

Active enrollments

No enrollments yet

Contributions

No contributions yet

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

+	Enrolled in FSA	Jan 1, 2016 >
👤	Enrolled in Dependent Care	Jul 1, 2015 >
+	Enrolled in FSA	Jul 1, 2015 >
●	Status changed to Active	Apr 18, 2011

View Dependent Information

[< Back to Employees](#)

Aaron EMPLOYEE ⓘ

[View profile](#)

● Status: Active >

[Summary](#)

[Claims + Payments](#)

[Enrollments](#)

[Contributions](#)

[< Back to Aaron EMPLOYEE](#)

Aaron EMPLOYEE's Profile ⓘ

● Status: Active >

[Personal](#)

[Employment](#)

[Dependents](#)

[Debit Card](#)

Dependents

[+ New dependent](#)

● **First Dependent**
Active

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

Summary Claims + Payments Enrollments Contributions

Active enrollments [View all](#) **Angelina's activity**

- FSA** Effective Aug 1, 2021 >
\$2,750.00 annual election Active

Contributions [View all](#)

- (\$5.56)** Posted >
FSA Aug 7, 2015
- \$2.06** Posted >
FSA Jun 10, 2015
- \$2.06** Posted >
FSA Jun 3, 2015

- Enrolled in FSA** Aug 1, 2021 >
- FSA updated** Aug 11, 2015 >
- Claim was paid \$5.00** Apr 29, 2015 >
- Filed a claim for \$5.00** Apr 27, 2015 >
- Debit card mailed** Apr 27, 2015 >
- Enrolled in FSA** Apr 15, 2015 >
- Status changed to Active** Jan 1, 1999

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

Summary Claims + Payments **Enrollments** Contributions

Active: 08/1/2021 - 12/31/2021 [+ New enrollment](#)

Payment method: Debit Card | Check

FSA Effective Aug 1, 2021
\$2,750.00 annual election Active

Aug 1, 2021

Annual election	Employee contributions
\$2,750.00	\$0.00 of \$2,750.00

[View contributions](#) [View deductions](#)

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**.

The screenshot shows the 'Enrollments' tab selected in a navigation bar with 'Summary', 'Claims + Payments', 'Enrollments', and 'Contributions'. Below the navigation bar, the status 'Active: 08/1/2021 - 12/31/2021' is displayed, along with a '+ New enrollment' button and 'Payment method: Debit Card | Check'. The main content area features a dashed border around an 'FSA' enrollment with a medical icon, '\$2,750.00 annual election', and 'Effective Aug 1, 2021 Active'. Below this, a summary for 'Aug 1, 2021' shows an 'Annual election' of '\$2,750.00' and 'Employee contributions' of '\$0.00 of \$2,750.00'. At the bottom of the summary are 'View contributions' and 'View deductions' buttons.




The 'New enrollment' form has a progress bar with four steps: '1 Plan year', '2 Plans', '3 Payment method', and '4 Plan details'. The 'Select plan year' step is active. It contains three selectable options: 'Health Savings Account', '08/01/2021 - 12/3...' (with a sub-option 'Aug 1, 2021 - Dec 31, 2021'), and '01/01/2021 - 12/3...' (with a sub-option 'Jan 1, 2021 - Dec 31, 2021'). 'Cancel' and 'Next' buttons are at the bottom.

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

New enrollment

Plan year 2 **Plans** 3 Payment method 4 Plan details

Select one or more plans

		
FSA Learn more	Limited Purpose FSA Learn more	Dependent Care Learn more


Cancel Back Next

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.

Plan year Plans 3 **Payment method** 4 Plan details

Select primary payment method


 Debit Card

Select alternate payment method

	
Check	Direct Deposit <small>Employee will need to setup a bank account</small>

Back Next

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

New enrollment

Plan year Plans Payment method 4 **Plan details**

Select plan details

FSA

Effective date

Employee elections

Annual employee election
\$0.00

Employer contributions

Annual employer contribution
\$0.00

Cancel Back Submit

[< Back to E](#)



New enrollment successfully added

Test Employee

[View profile](#)

● Status: [Active >](#)

● Debit Card: [Closed](#)

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

Summary Claims + Payments **Enrollments** Contributions

Active: 08/1/2021 - 12/31/2021 + New enrollment

Payment method: Debit Card | Check

FSA Effective Aug 1, 2021
\$500.00 annual election Active

Aug 1, 2021

<p style="font-size: small;">Annual election</p> <p>\$500.00</p>	<p style="font-size: small;">Employee contributions</p> <p>\$0.00 of \$500.00</p>
---	--

View contributions
View deductions
Edit enrollment

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:

Test Employee's Profile

● Status: [Active >](#) ● Debit Card: Closed

Personal

Employment

Dependents

Debit Card

Personal information

Name
Test Employee

Username
TEMPLOYEE050344537

Gender
n/a

SSN
... .. 6667

Marital status
n/a

Home phone
n/a

Work phone
n/a

Email address
_____@gmail.com

Addresses

Home address
1175 John Street
West Henrietta, NY 14586
United States

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.

The screenshot shows the 'Account Summary' page for 'Test Employee'. At the top, there is a 'Back to Employees' link and a 'View profile' button. The employee's status is 'Active' and their debit card is 'Closed'. Below this are tabs for 'Summary', 'Claims + Payments', 'Enrollments', and 'Contributions'. The 'Summary' tab is active, showing three sections: 'Active enrollments', 'Contributions', and 'Test's activity'. 'Active enrollments' lists three items: FSA (\$500.00 annual election, effective Aug 1, 2021), FSA (\$2,000.00 annual election, effective Jan 1, 2021), and Dependent Care (\$4,000.00 annual election, effective Jan 1, 2021). 'Contributions' lists three items: \$76.92 for Dependent Care (posted Mar 2, 2021), \$38.46 for FSA (posted Mar 2, 2021), and \$76.92 for Dependent Care (posted Feb 23, 2021). 'Test's activity' lists seven items: Enrolled in FSA (Aug 1, 2021), Enrolled in Dependent Care (Jan 1, 2021), Enrolled in FSA (Jan 1, 2021), Enrolled in Dependent Care (Jan 1, 2019), Enrolled in FSA (Jan 1, 2019), Enrolled in FSA (Jan 1, 2018), and Dependent Care updated (Nov 2, 2017).

Enrollments

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

The screenshot shows the 'Enrollments' page for 'Test Employee'. At the top, there is a 'Back to Employees' link and a 'View profile' button. The employee's status is 'Active' and their debit card is 'Closed'. Below this are tabs for 'Summary', 'Claims + Payments', 'Enrollments', and 'Contributions'. The 'Enrollments' tab is active, showing three enrollment periods: 'Active: 08/1/2021 - 12/31/2021' (payment method: Debit Card | Check), 'Active: 01/1/2021 - 12/31/2021' (payment method: Debit Card | Check), and 'Previous: 01/1/2019 - 12/31/2019' (payment method: Debit Card | Direct Deposit). Each period lists the enrollment details for FSA and Dependent Care, including the annual election amount and the effective date.

Contributions

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

The screenshot shows the 'Contributions' page for 'Test Employee'. At the top, there is a navigation bar with a 'Back to Employees' link, the employee name 'Test Employee' with an information icon, and a 'View profile' button. Below this, the employee's status is shown as 'Active' and 'Debit Card: Closed'. The main content area has tabs for 'Summary', 'Claims + Payments', 'Enrollments', and 'Contributions', with 'Contributions' being the active tab. The 'Contributions' section is titled 'Contributions' and includes a 'Sort by date (descending)' dropdown. The table lists eight contribution entries, each with a plus icon, a dollar amount, a description, and a date. A 'FILTERS' sidebar on the right contains three dropdown menus: 'Account type' (set to 'Non-HSA'), 'Account' (set to 'All'), and 'Contribution type' (set to 'All').

Amount	Description	Date
\$76.92	Dependent Care	Mar 2, 2021
\$38.46	FSA	Mar 2, 2021
\$76.92	Dependent Care	Feb 23, 2021
\$38.46	FSA	Feb 23, 2021
\$76.92	Dependent Care	Feb 16, 2021
\$38.46	FSA	Feb 16, 2021
\$76.92	Dependent Care	Feb 9, 2021
\$38.46	FSA	Feb 9, 2021

Claims + Payments

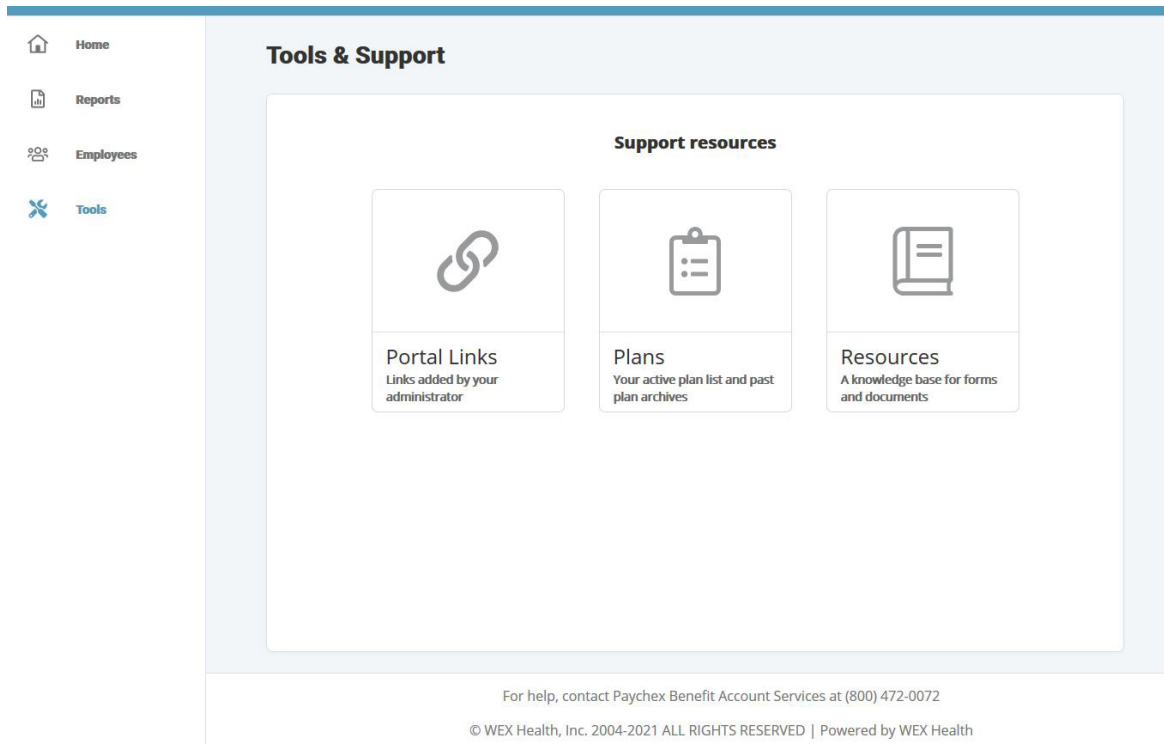
Access the complete history of an employee's claims, with the ability to filter information on the account by the date the claim was submitted or the method by which it was filed. Claim Information, including date submitted, date of service, account, claim status, receipt status, and claim amount broken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

The screenshot shows the 'Claims + Payments' page for 'Test Employee'. At the top, there is a navigation bar with a 'Back to Employees' link, the employee name 'Test Employee' with an information icon, and a 'View profile' button. Below this, the employee's status is shown as 'Active' and 'Debit Card: Closed'. The main content area has tabs for 'Summary', 'Claims + Payments', 'Enrollments', and 'Contributions', with 'Claims + Payments' being the active tab. The 'Claims + Payments' section is titled 'Claims' and includes a 'Sort by date (descending)' dropdown. The table lists five claim entries, each with a status icon, a dollar amount, a description, and a date of service. A 'FILTERS' sidebar on the right contains three dropdown menus: 'Claim status' (set to 'All'), 'Account' (set to 'All'), and 'File date' (set to 'All').

Amount	Status	Description	Date of Service
\$50.00	Paid	FSA	May 1, 2017
\$552.00	Paid	FSA	Feb 6, 2017
\$6.00	Denied	FSA	Feb 2, 2017
\$20.00	Denied	FSA	Jan 16, 2017
\$20.00	Paid	FSA	Jan 2, 2017

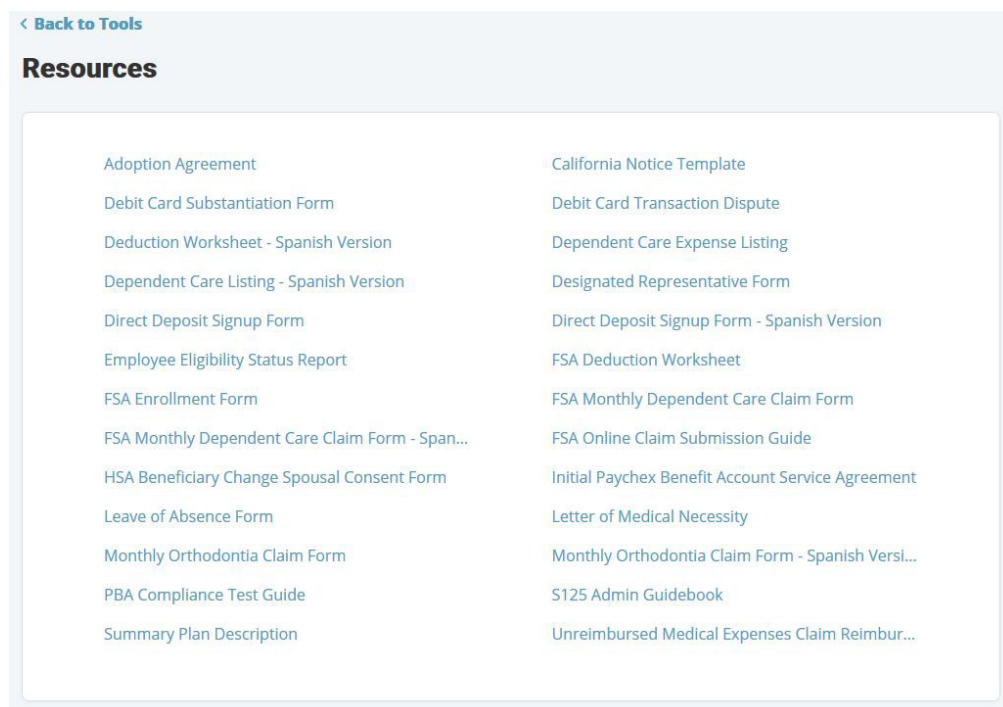
Tools

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.

< Back to Tools

Links

Employee Guides

[Employee Enrollment Guide](#)

Helpful Links

[FSA Eligible Products and Services](#)

[FSA Savings Calculator](#)

[IIAS Website](#)

[Internal Revenue Service](#)

[Shop FSA Eligible Products](#)

Plan Documents

[Basic Plan Document](#)

Plans

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

< Back to Tools

Plans

Active plans

[FSA \(1/1/2021 - 12/31/2021\)](#)

Participating in an HSA? Ensure you are enrolling in the Limited Purpose FSA. Please refer to your Summary Plan Description (SPD) for specific plan details. You can obtain the SPD from your Employer.

Effective 01/01/2016 the first two debit cards issued per participant will be free of charge. Any subsequent debit cards requested after the initial two will result in a \$5 fee which will be charged automatically to the participant's account balance.

[Limited Purpose FSA \(1/1/2021 - 12/31/2021\)](#)

Participating in an HSA? Ensure you are enrolling in the Limited Purpose FSA. Please refer to your Summary Plan Description (SPD) for specific plan details. You can obtain the SPD from your Employer.

Effective 01/01/2016 the first two debit cards issued per participant will be free of charge. Any subsequent debit cards requested after the initial two will result in a \$5 fee which will be charged automatically to the participant's account balance.

[Dependent Care \(1/1/2021 - 12/31/2021\)](#)

Please refer to your Summary Plan Description (SPD) for specific plan details. You can obtain the SPD from your Employer.

[Health Savings Account](#)

Health Savings Accounts (HSAs) are individually-owned health reimbursement accounts that allow the participant to use pre-taxed dollars to fund the account. Interest or dividends accumulate tax-free, and reimbursement of qualified medical expenses is tax-free. HSAs work hand in hand with high-deductible health plans (HDHP). Individuals who make contributions to an HSA must be covered by an HDHP. The HDHP must satisfy minimum deductible amounts with certain out-of-pocket maximums. To review minimum deductible amounts and out-of-pocket maximums, visit irs.gov. HSA account holders may not be covered by any other insurance plan that is not an HDHP or that covers benefits provided by the HDHP or below the deductible of the HDHP. There are exceptions for "permitted insurance" or "permitted coverage" products. An HSA must be set up with a qualified custodian or trustee. Paychex's custodian is HealthcareBank.

Previous plans

[FSA \(3/1/2020 - 12/31/2020\)](#)

Participating in an HSA? Ensure you are enrolling in the Limited Purpose FSA. Please refer to your Summary Plan Description (SPD) for specific plan details. You can obtain the SPD from your Employer.

Effective 01/01/2016 the first two debit cards issued per participant will be free of charge. Any subsequent debit cards requested after the initial two will result in a \$5 fee which will be charged automatically to the participant's account balance.

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