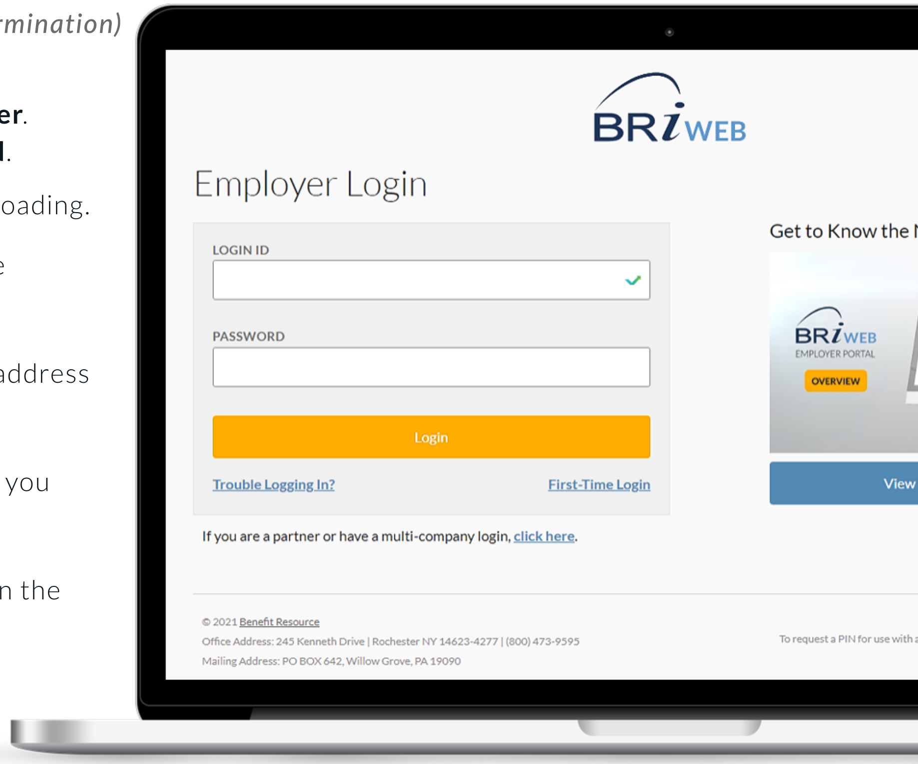
Web Administration

Access these features by logging onto BenefitResource.com with your Employer Login ID and Password.

BASIC WEB FUNCTION INSTRUCTIONS

UPLOAD A FILE OR FORM

(Enrollment, Change, Deduction/Funding, or Termination)



From the left navigation menu, click **File Transfer**.
From the drop-down, select **Secure File Upload**.

1. Choose the file type or form you are uploading.
2. Choose the plan type for the file you are uploading.
3. Enter your email address and the email address of any other recipients (optional).
4. Select **Browse** to find the file or form(s) you want to upload.
5. Add any notes about the file or form(s) in the **Comments** section.
6. Click **Upload** to initiate the upload.

REPORT A TERMINATION:

From the left navigation menu, click **Manage Participants**.

1. In the **Participant Details** box, search for the Participant by Last Name or Member ID.
2. Click **View Details**.
3. Scroll down to the bottom of the page and click **Term Participant**.
4. Enter the Month, Day, and Year of the effective date of change.
5. Click **Submit**.
6. Save the **Confirmation** for your records.

BASIC REPORTING FUNCTIONS

HOW TO ACCESS REPORTING:

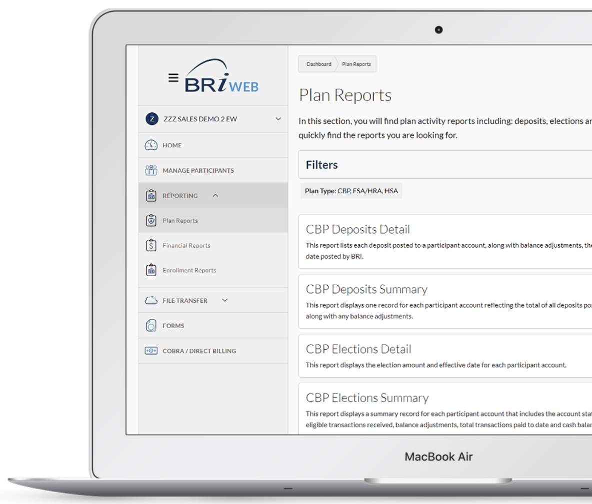
From the left navigation menu, click **Reporting**.

Below is a basic list of Plan, Financial, and Enrollment Reports and may vary from the specific reports available under your account.

PLAN REPORTS:

Set the filters to the Report Type and Plan Type you want. Select **Apply**.

- **Account Summary:** Displays a summary record for each participant account, including account status, total deposits posted, total eligible transactions received, total transactions paid to date, and cash balance.
- **Deposits Detail:** Lists each deposit and balance adjustment posted to a participant account, along with the pay date/funding date and the date posted by BRI.
- **Deposits Summary:** Displays one record for each participant account reflecting the total of all deposits and balance adjustments posted to date for that account along with any balance adjustments.
- **Elections Detail:** Displays the election amount and the effective date for each participant account.
- **Payment Detail:** Lists each payment that impacts an account balance. Activity may include adjustments, card payments, card refunds, checks, direct deposits, fees, voided items, and/or vendor payments.
- **Payment Summary:** Displays one record for each participant account reflecting the total of all payments for that account.



FINANCIAL REPORTS:

Set the filter to the Report Type you want. Click **Apply**.

- **Funding Summary:** Provides a line-item summary of each financial transaction, including the date and amount. Click through the report to view detailed funding by participant and account.
- **Billing - Employee Counts:** This provides a list of billable participants across all plan types.
- **Billing - Card Fees:** This report provides a list of billable card issuance activities.
- **Imputed Income Detail:** This report lists amounts that should be imputed as taxable wages.

ENROLLMENT REPORTS (IF OFFERING ONLINE ENROLLMENT):

Set the filters to the Report Type and Plan Type you want. Click **Apply**.

- **Employee Eligibility & Enrollment:** This report provides a per participant view of eligible employees for commuter benefits, including the monthly mass transit and/or parking elections that have occurred.
- **Participant Status Detail:** This report provides each employee's employment status who enrolled in at least one benefit account during the current or prior plan year. Please allow 2-3 business days for recent changes to reflect in this report.
- **Continuous Enrollment Detail:** This report summarizes enrollments and election changes occurring outside of the annual open enrollment period.

DOWNLOADING, SAVING, AND OPENING FILES:

From the left navigation menu, click **File Transfer**. From the drop-down, select **Secure File Download**.

For downloading uploaded files:

- Right-click on the File Name or on the arrow to the right of the file name.
- Choose **Save File, Save Link As**, **Save Target As**, or **Save Link to Disk** (exact wording may vary depending upon your browser).

For downloading an Online Report:

- Click on the **Download Report** button.
- Select **Save File**.

MANAGING WEB ENROLLMENT (IF YOUR PLAN ALLOWS)

HOW TO MANAGE ELIGIBILITY:

From the left navigation menu, click **Manage Participants**.

Bulk Changes:

1. Click on the blue underlined **Upload Changes** link to upload your full eligibility file.
2. Once BRI processes the eligibility file, your eligible employees will be able to log onto the BRI website to enroll or make changes.

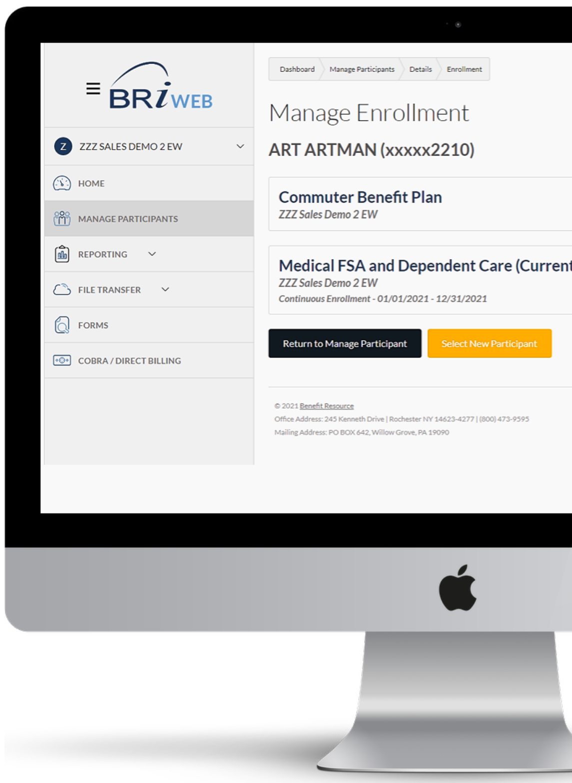
Individual Changes:

1. Click **Add New Participant.** Verify/add the required demographic data and make any appropriate changes.
2. At the bottom of the page, click **NEXT: Manage Eligibility**.
3. Select the eligible plan. Once the employee information is saved, the employee will be able to log onto the BRI website to enroll or make changes.

HOW TO SET/CHANGE A PARTICIPANT'S ENROLLMENT:

From the left navigation menu, click **Manage Participants**.

1. Within the **Participant Details** box, search for the Participant by Last Name or Member ID.
2. Click **View Details** to the right of the participant.
3. Under **Plan Eligibility and Enrollment**, click the **Manage Enrollment** button.
4. Expand the plan section you want to modify and add the requested information. You may be prompted to provide additional details if required by the plan.
5. When finished, select **Update Elections** to save the information.



A Couple of Notes:

- If a plan you wish to modify is not showing, you will have to make the participant eligible for that plan. (See ***How to Maintain Eligibility, Individual changes*** above).
- New enrollees will receive their cards approximately two weeks after the enrollment period is complete.