



Web Administration Instructions

Access these features by logging onto BRIWEB through BenefitResource.com and using your employer Tax ID and employer password.

BASIC WEB FUNCTION INSTRUCTIONS

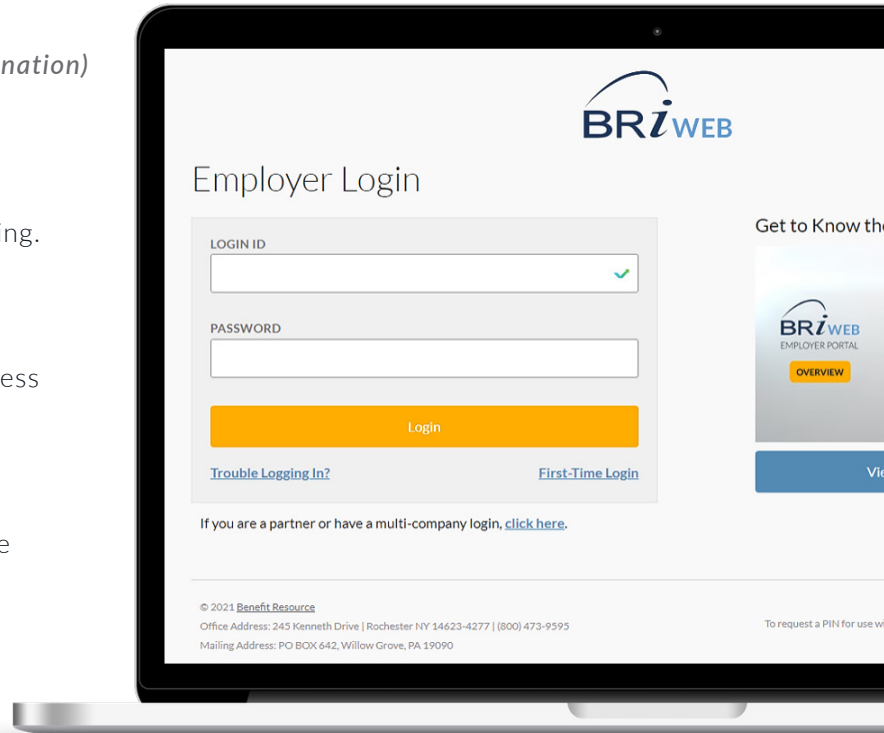
UPLOAD A FILE OR FORM

(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 ONLINE:

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

PLAN REPORTS:

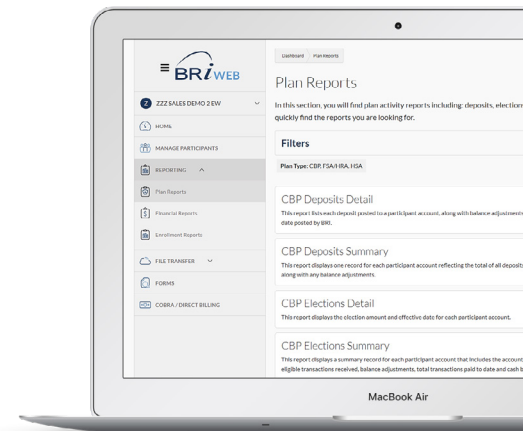
Set the filters to the Report Type and Plan Type you want. Select **Apply**.

- **Elections Summary:** Displays a summary record for each participant account, including the account status, total deposits posted, total eligible transactions received, total transactions paid to date, and cash balance.
- **Deposits Detail:** Lists each deposit 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 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.
- **Transactions Detail:** Lists each transaction (other than deposits) that impacts an account balance. Activity may include adjustments, card payments, card refunds, checks, direct deposits, fees, voided items, and/or vendor payments.
- **Transactions Summary:** Displays one record for each participant account reflecting the total of all transactions (other than deposits) 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 Detail:** This provides a list of billable participants across all plan types.
- **Card Activation Detail:** This report provides a list of billable card issuance activities.
- **Imputed Income Detail:** This report lists former employees and amounts that should be imputed as W-2 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.
- Choose **Save Link As**, or **Save Target As** (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 **Eligibility File** link and download the file.
- 2 Fill in the required demographic data and click **Save**.
- 3 Upload the file through the **File Transfer** tab.
- 4 Once the employee information is saved, the employee 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 Under **Plan Eligibility and Enrollment**, click the **Manage Enrollment** button.
- 3 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.
- 4 When finished, select **Update Elections** to save the information.

Note: 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).

Note: New enrollees will receive their cards approximately two weeks after the enrollment period is complete.

