



Transition to Benefit Resource

HASSLE-FREE SWITCH TO A TRUSTED BENEFITS PARTNER

AN EASY SWITCH

No need for transition worries. **Switching to Benefit Resource is as easy as 1, 2, 3!**

1 PLAN DESIGN & INTAKE

- Receive welcome email with custom landing page
- Schedule in person enrollment meetings with your Sales Representative (if desired)
- Discuss plan design and any possible changes

2 ENROLLMENT STRATEGY AND COMMUNICATIONS

- Choose enrollment materials (digital and/or hard copy) to provide to employees
- Schedule in person enrollment meetings with your Sales Representative (if desired)
- Attend optional webinar overview of BRiWeb Portal

3 ISSUE DEBIT CARDS AND PROCESS TAKEOVER

- Upload enrollments via BRiWeb or File Feed
- Debit Cards mailed to participants prior to start date
- Takeover file provided and balances loaded in BRiWeb

COMPLETE!


Pro Tip: Benefit Resource is proud to provide a full suite of tax-free benefit accounts and supplemental services. By combining services with us, you are able to provide a more robust account offering while saving time and money administering your benefits.


RESOURCES TO HELP YOU STAY ON TRACK


Personal Support: Your **Consumer Directed Benefits Specialist** will serve as your day-to-day contact for processing and program questions, while your **Assigned Account Executive** will provide overall management of your programs.


Open Enrollment Engagement: Benefit Resource provides a variety of resources to help communicate plan offerings. Additionally, we offer support through in-person or online enrollment.

Solution-Oriented Technology: We have our own secure, proprietary technology. This allows us to react swiftly to an ever-changing regulatory landscape, as well as accommodate requested changes and improvements.

 **BRiWeb:** Secure online login for employers and participants to manage their accounts.

 **BRiMobile:** Mobile app for participants to provide on-the-go account access, available on the App Store and Google Play.

 **Beniversal® Prepaid Mastercard®:** One card to access pre-tax account funds. Compatible with Apple Pay®, Google Pay® and Samsung Pay®.

 **BRI Insights:** Decision support tool that helps employees understand their benefit choices and provides them with personalized benefits recommendations.