KEY-IN ENROLLMENT

If you'll be making an employer contribution into your participants' Medical or Dependent Care Flexible Spending Account (FSA), the key-in method won't be an option for you. The key-in method should only be used when the member is not successfully passing on the file.

Step 1: Log in to your account via LEAP and select Benefits Administration. From the homepage, hover your mouse over the Employees tab and click the "Add Employee" link.

Step 2: Enter the personal information for the participant. Please include an email address to ensure participants receive a welcome email with instructions for logging into their online accounts. **Please note:** If a field within the screenshot below is not required for your plan, it will not appear when adding employees.

ADDITIONAL DETAILS:

Email Address: Providing the email address is the only way that an employee can log in to their online account without having to contact Aptia.

SSN: If you are updating the social security number for an existing enrollee (and not adding in a new enrollment), please notify your direct contact at Aptia and WEX to ensure that the data is consistent within all systems.

Guide to Enrolling Participants by Key-In Method, continued

Step 3: Next, enter the employment information for the participant.

ADDITIONAL DETAILS:

Employee Number: Enter the internal number that your company has assigned to the employee. This number will be shown on all reports and under the Employees tab in your online account (payroll number is commonly used).

Hire Date: Enter the participant's hire date.

Payroll Frequency/Division: Ensure the participant is placed into the correct payroll frequency to allow for accurate posting of payroll contributions. If you have multiple payroll frequencies and/or divisions, a drop-down field for each of these options will be available under the Employment Information section.

Payroll Frequency Effective Date: Enter the participant's hire date.

Fields with an * are required (except for username and password).

Step 4: Review and verify all of the entered information and click "Add Employee" to add the employee's demographic information. To enroll this participant in a plan(s), click on the Add New Enrollment link.

Step 5: Choose the plan you'd like the participant to enroll in by selecting the payment method and an alternative method. **Please note:** Only applicable plan types will appear.
- **Payment Method:** The Aptia debit card will be grayed out as the default method for all plans.
- **Alternative Method:** Check is most commonly selected for the alternative method. This indicates if a participant does not use their benefits debit card but instead submits a claim manually. Aptia will reimburse them via a check. Participants are able to change the alternative method when they create their own account.

Step 6: The details will open for each plan the participant is requesting to be enrolled in. Enter all of the required information for each plan. See below for screenshots for different benefit plans. **Note:** Once the election amount is entered, the plan cannot be removed. Please contact your Aptia contact if you have any questions.

FSA — Medical, Limited Medical and Dependent Care

Medical FSA

Effective Date: mm/dd/yyyy

Annual Election: $ 0.00

ADDITIONAL DETAILS:

Effective Date: Enter the date the participant is eligible in the plan.

Election: Enter the participant's total annual election amount.

Delayed Enrollments: If you are enrolling a participant after the plan start date and they are eligible to be reimbursed for claims dating back to the start of the plan, enter the plan start date as their effective date.

HSA

A participant may not enroll in the HSA benefit plan if they are currently enrolled in the Medical FSA. Contact Aptia for more information. **Note:** When an HSA enrollment is keyed into the system, the employee will have to read and accept the Terms and Conditions before they have access to their funds. This will be presented to them in their online account next time they log in after the HSA enrollment is keyed in.

HSA

Effective Date: mm/dd/yyyy

Coverage Level: Individual

ADDITIONAL DETAILS:

Effective Date: Enter the 1st of the month in which they are eligible. A participant is eligible the 1st of the month following their enrollment in the plan.

The Contribution Level and Coverage Level should match.

Commuter Benefits

Updated Transit Plan 01/01/2016-12/31/2016

Effective Date: 7/1/2016

Monthly Election: $ 0.00

View Payroll Deductions

ADDITIONAL DETAILS:

Effective Date: Must be on the 1st of the month a month before the participant plans on using the funds/debit card.

Election Amount: Enter the participant's total monthly election.

HRA

The contribution options below may differ depending on your plan design.

Updated HRA 10/01/2014-09/30/2015

Effective Date: 9/15/2015

Contribution Level: Individual

ADDITIONAL DETAILS:

Effective Date: Enter the date the participant is eligible in the plan.

Delayed enrollments: If you are enrolling a participant after the plan start date and they are eligible to be reimbursed for claims dating back to the start of the plan, enter the plan start date as their effective date.

Step 7: Once all of the required information has been entered correctly, click "Submit" at the bottom of the screen to enroll the participant in the plan(s). Upon successful enrollment, a message will appear stating which plan(s) the participant has been enrolled in.

Step 8: Repeat these steps to enroll each participant in a benefit plan(s).