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Using the Chard Snyder Employer Portal

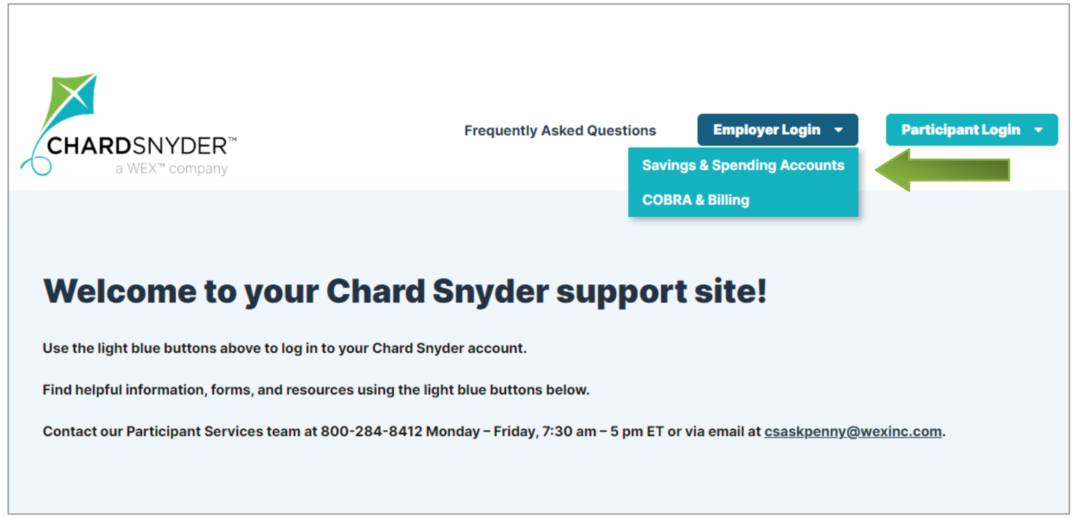
www.benefit-info.com/csn

Access the Employer Portal

Welcome to the Chard Snyder Employer Portal. The portal provides you the tools you need to better support your employees in the management of their benefits plans.

The Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- View current and prior year plan information
- Access forms and documents
- Retrieve scheduled reports or notifications
- View participant account summary and balances, enrollments, contributions, claims, and payments
- Add, update, and enroll employees



To access the portal, follow these steps:

1. Go to www.benefit-info.com/csn.
2. Click on the blue *Employer Login* button in the upper right corner of the page.
3. Select *Savings and Spending Accounts* from the drop down list.
4. Enter the username and password provided to you by Chard Snyder. (Upon first login, you will be prompted to change the password.)

Using the Employer Portal

Access the tabs on the left side of the page for easy navigation.

Home

Quickly find the information you need from the home page. Check on the status of data import files, set up recurring contributions, view employee-level data, and review recent reports.

Imports

Import data and view pending, processing, completed files. See our **Employer Data File Import Guide** for complete instructions.

Set up Contributions

View your plan's contribution schedules, if applicable.

Reports

Readily access, run, and download reports and notifications. Select the enrollment, financial, or plan information report you are interested in and it will automatically be displayed.

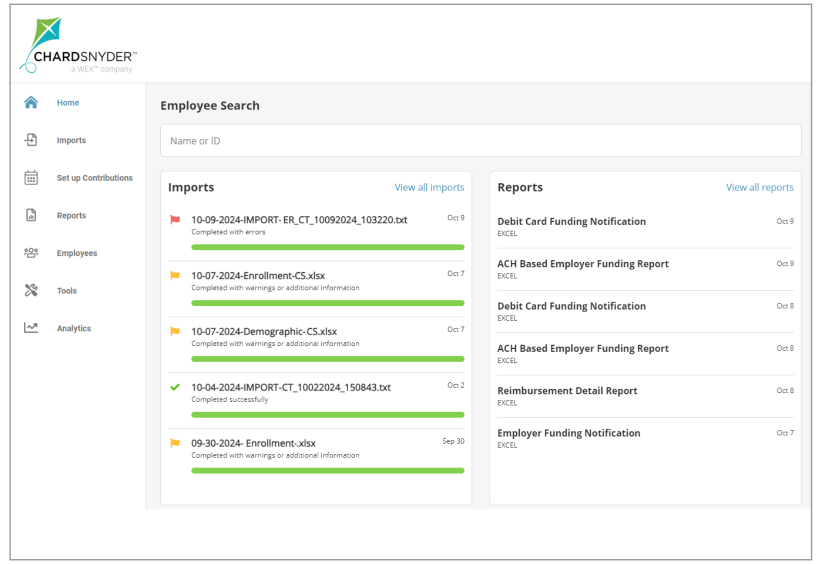
Employees

Save time searching for employee-specific information. Search for an employee by any or all fields to view summary information, enrollments, activity, contributions, and claim history (as allowed by HIPAA).

Tools

Tools & Support resources include:

- **Portal Links**
  Links to helpful websites such as Chard Snyder, the FSA Store, and the Eligible Expense Table are found here.
- **Plans**
  Summaries of any plans being offered to your employees can be seen here.
- **Resources**
  The HRA Plan Summary (if applicable), Claim Form (FSA), Claim Reimbursement Terms and Conditions, and other resources found useful for your plan may be seen here.



Analytics

Explore interactive data and compare your business to the industry to fully understand how employees are interacting with their benefits and improve future offerings.

Please note that some features are only available for certain plan designs or may require the user to have a specific role assigned. If you have any questions or would like access to additional features, please contact us.

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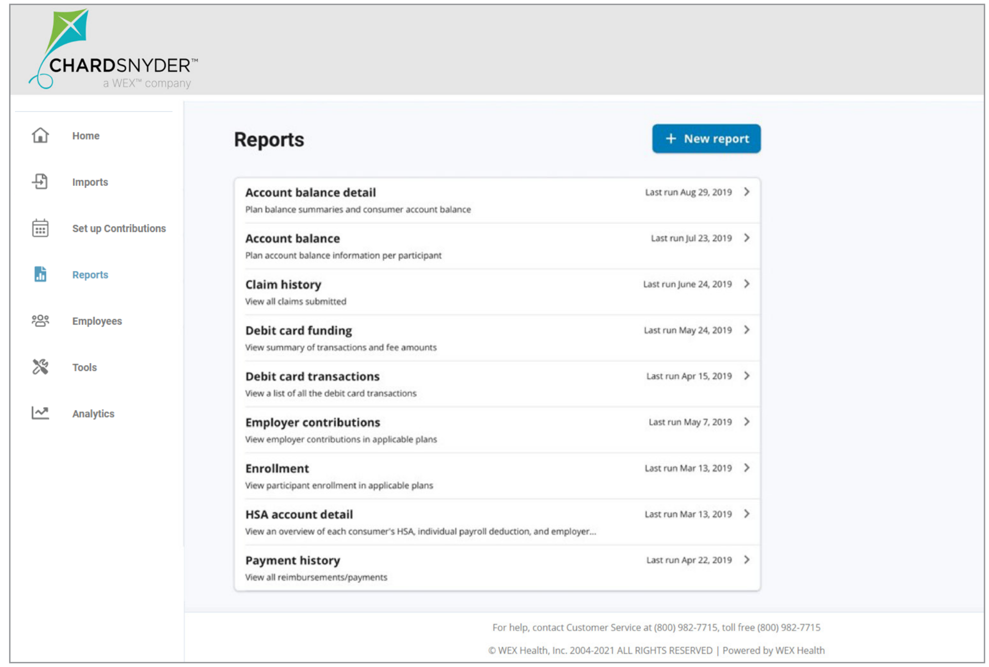
Reports Tab

On the Reports tab you will see a list of all available reports that can be viewed. Simply select the relevant enrollment, financial, contribution, or plan information report desired and it will automatically be displayed.

An email notification will be sent on your reimbursement day for any scheduled report when it is available on the Employer Portal.

You are also able to run your own reports by selecting + New Report in the top right corner. Complete the fields marked with the red asterisk and click *Request*. Check the box if you would like an email notification when the report is available.

If there is a report that you need, but do not see, contact your Chard Snyder support team.



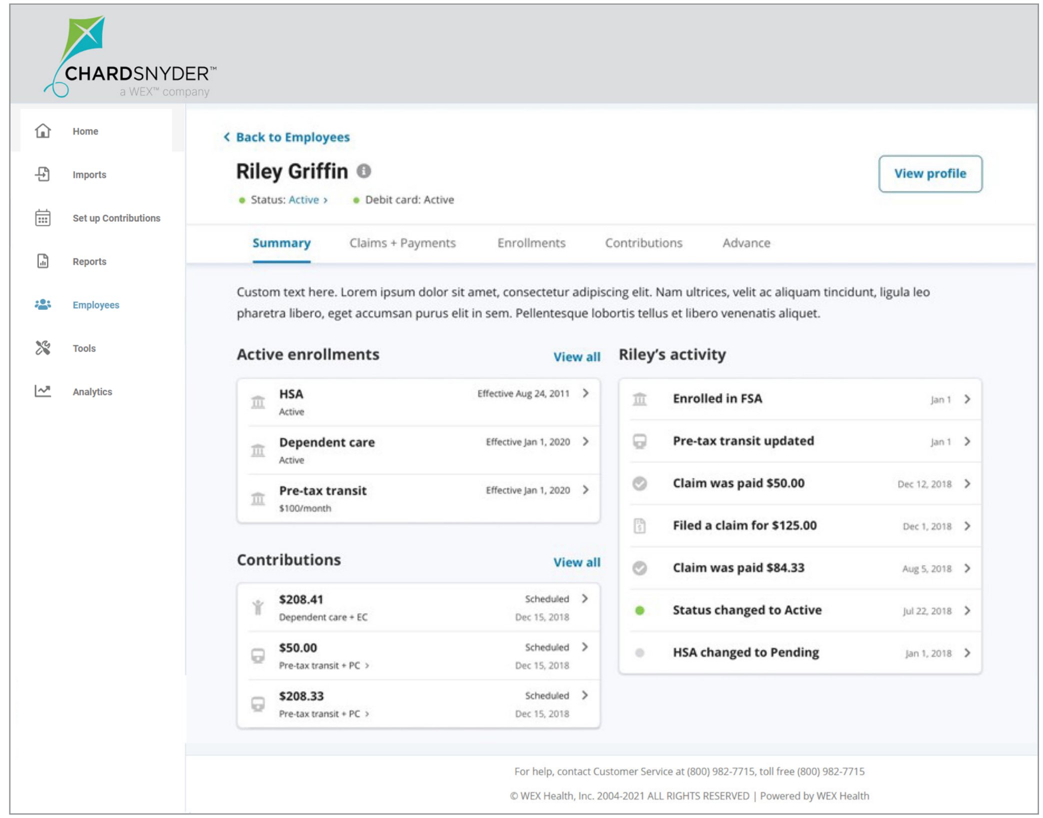
Employee-Level Data

Under the Employees tab, you can get real-time data on all enrolled employees.

You can search for employees using first name, last name or employee identifier (defined ID or SSN).

Once in the employee view, you can access additional information on the following tabs:

- Summary
- Claims and Payments
- Enrollments
- Contributions
- Activity



Adding, Updating and Enrolling New Employees

Depending on your assigned role and plan setup, you may also be able to add, enroll, and update employees through the portal. From the Employees tab, click on the *New Employee* button to get started. After you have added the employee's personal and employment information, make sure to add the plans they are enrolled in, the primary payment method, and the enrollment plan details.

Updating an Employee's Status

You may also update an employee's status. Do this by pulling up the employee and clicking on the status link right below their name. Then you can select a status from the drop-down menu. Enter the effective date, click *Show Status History*, and click *Add*.

See our **Employer Online Enrollment Guide** for additional details.

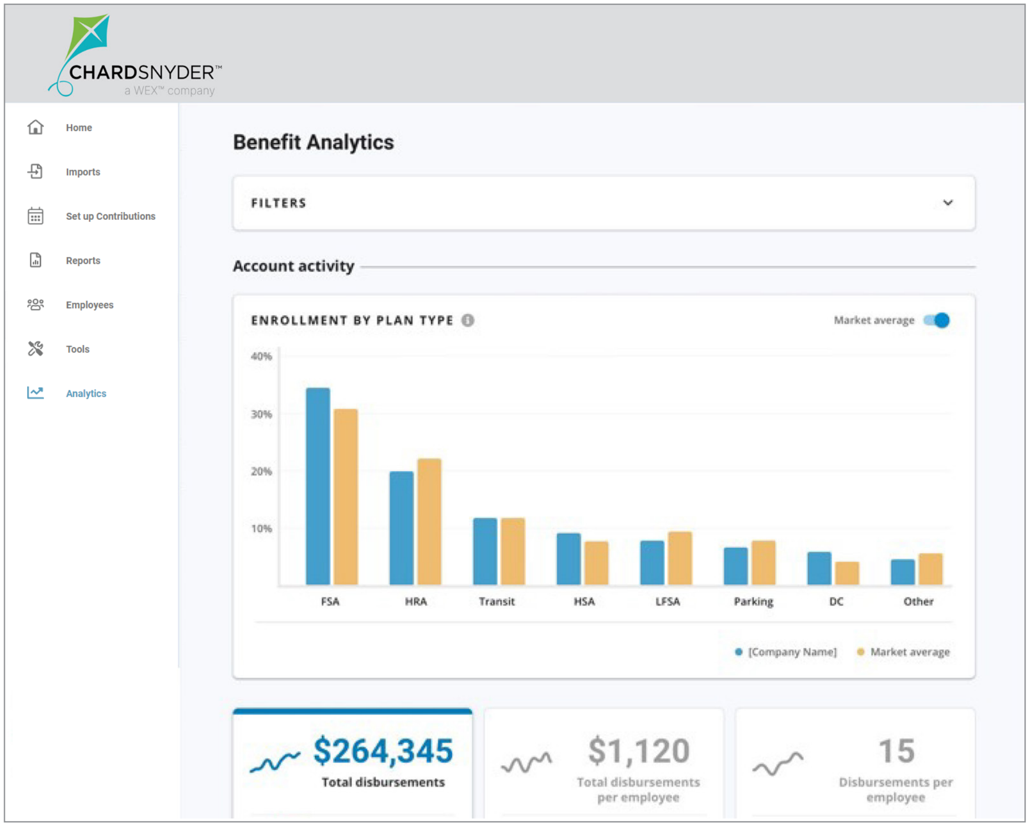
Analytics

Under the Analytics tab, you can view interactive data that analyzes benchmark comparisons to help you easily interpret your benefits.

You can track employee utilization to improve future benefit offerings, compare your participants to industry standards, or view how employees are interacting with their benefits.

Once in the analytics view, you can access additional capabilities and filters including:

- Financial readiness and engagement
- Market comparisons
- Enrollment by account type
- Account spending statistics



If you have any questions, or need assistance, while using the Chard Snyder Employer Portal, contact your support team.