

# Instructions for Adding and Enrolling Participants

To access the employer portal, go to <u>www.benefit-info.com/csn</u> and click on the blue Employer Login button in the upper right corner of the page. Then choose Savings & Spending Accounts from the drop-down menu.

|                            | Frequently Asked Questions Employer Login 🔻 Participant Login 🔻 |
|----------------------------|---|
| a WEX <sup>™</sup> company | Savings & Spending Accounts                                     |
|                            | COBRA & Billing   |

Enter your username and password, then click Log In:

| Log in                |     |  |
|-----------------------|-----|--|
| Username              |     |  |
| Password              | • • |  |
| Forgot your password? |     |  |
| Forgot your password? |     |  |

# **Enroll Current Participants**

To add an enrollment for an existing employee (already in the system), go to the Employees tab:

| СН  | ARDSNYDER <sup>™</sup><br>a WEX <sup>™</sup> company |                     |                              | JM              |
|-----|--|---------------------|------------------------------|-----------------|
| ٦   | Home   | Employees           | + New employee               |                 |
| Ð   | Imports  | Name or ID          |                              |                 |
| İ   | Set up Contributions                                 |                     | Sort alphabetically (a to z) |                 |
| 4   | Reports  | John Jones          | Effective Jan 1, 2000        |                 |
| -24 | Employees  | Active              | SSN ••• •• 5551              | Employee status |
| ×   | Tools  | Active<br>Bob Smith | SSN 5552                     | Active          |
| ~*  | Analytics  | Active              | SSN 2333                     |                 |



Employees will be listed alphabetically. Search the list by employee last name, first name or Social Security Number, or view the list according to employee status (All, Active or Inactive) using the FILTERS section on the right. After you have selected the employee, click View Profile to update their personal, employment, and dependent information if needed:

| ٦  | Home                 | < Back to Billy Brown  |  |  |  |  |  |
|----|----------------------|--|--|--|--|--|--|
| Ð  | Imports              | Billy Brown's Profile   • Status: Active>                    |  |  |  |  |  |
|    | Set up Contributions | Personal Employment Dependents Debit Card                    |  |  |  |  |  |
|    | Reports              |  |  |  |  |  |  |
| *  | Employees            | Personal information   |  |  |  |  |  |
| *  | Tools                | First name     MI     Last name       Billy     MI     Brown |  |  |  |  |  |
| ~* | Analytics            | Birth date<br>6/17/1955 Gender<br>Male                       |  |  |  |  |  |

You can see their active accounts and inactive accounts if the participant was previously enrolled.

To add a new enrollment, click the blue + New enrollment button:

| ٦  | Home                 | < Back to Employees  |
|----|----------------------|--|
| Ð  | Imports              | Billy Brown  View profile  |
| i  | Set up Contributions | Summary Balances Claims + Payments Enrollments Contributions                                 |
| 4  | Reports              | Active: 07/1/2021 _ 06/20/2022   |
|    | Employees            | Payment method: Check  |
| ×  | Tools                | FSA Healthcare 07/01/2021     Effective Jul 1, 2021     42,750.00 annual election     Active |
| ~* | Analytics            | Previous: 07/1/2020 - 06/30/2021   |

On the New enrollment page, select Plan year, then click Next:

| ſ∎<br>₽ | Home                 | < Back to enrollments New enrollment |  |              |
|---------|----------------------|--------------------------------------|--|--------------|
|         | Set up Contributions | 1 Plan year 2                        | Plans ③ Payment method                                   | Plan details |
| L.      | Reports              |                                      |  |              |
| ***     | Employees            |                                      | Select plan year   |              |
| ×       | Tools                | 2                                    | 2012 HSA   |              |
| ~*      | Analytics            |                                      |  |              |
|         |                      | C                                    | <b>)7/01/2021 - 06/3</b><br>∄ Jul 1, 2021 - Jun 30, 2022 |              |



On the Plans page, select plan type then click Next:

| ۵<br>ج       | Home                         | < Back to enrollments New enrollment                                   |
|--------------|------------------------------|--|
| İ            | Set up Contributions         | Plan year 2 Plans 3 Payment method 4 Plan details                      |
|              | Reports                      |  |
| -            | Employees                    | Select one or more plans   |
| ×            | Tools                        | Currently enrolled   |
| ~*           | Analytics                    |  |
| :tps://stgcs | tchardemployer.lh1ondemand.c | FSA Healthcare 07/01/2021 FSA Limited 07/01/2021 07/01/2021 07/01/2021 |

In the Payment method page, select the correct method and click Next:

| ٦          | Home                 | New | enrollment    |                     |   |              |
|------------|----------------------|-----|---------------|---------------------|---|--------------|
| Ð          | Imports              | PI  | an year 🗸 Pla | ns 3 Payr           | nent method 4   | Plan details |
| i          | Set up Contributions |     | c.o.          | ect primary payment | method  |              |
|            | Reports              |     |               | eet primary payment |   |              |
| -          | Employees            |     |               |                     | ċ   |              |
| *          | Tools                |     | \$ ==         |                     |   |              |
| <u>~</u> ™ | Analytics            |     | Check         | Debit Card          | Direct Deposit<br>Employee will need to<br>setup a bank account |              |
|            |                      |     |               |                     |   |              |

Only the applicable options are displayed. The Debit Card will be listed as the default method for most plans. The alternative method is used when a participant submits a manual claim instead of using the benefits card. Participants will be able to change the alternative method when they create their online account.

**NOTE:** If the participant wishes to use Direct Deposit, they will have to log in to the Chard Snyder participant portal and enter their bank account information.



On the Plan details page, enter the plan effective date and annual election amount, then click Submit:

| ŵ | Home                 | New enrollment  |
|---|----------------------|---|
| £ | Imports              | Plan year Plans Payment method Plan details   |
| İ | Set up Contributions | Select plan details   |
|   | Reports              | DCA   |
| - | Employees            | Effective date<br>5/1/2022  |
| * | Tools                |   |
| ~ | Analytics            | Employee elections  |
|   |                      | Annual employee election<br>\$2,000.00<br>Payroll frequency Estimated payroll amount<br>Weekly \$250.00 |

Things to consider as you enroll participants in each of these plan types:

## Flexible Spending Account (FSA)

If you are enrolling an employee after the plan start date, but he or she is eligible to be reimbursed for claims dating back to the start of the plan, provide the plan start date as the employee's effective date.

## Health Savings Account (HSA)

If an employee enrolls in the middle of the month, the effective date is the first day of the following month.

## Commuter

If an employee would like to begin using the plan (and have funds available) in June, select 5/1 as the effective date. This allows participants to contribute to the plan in advance and have funds available to purchase a pass or voucher for the desired month.

The annual election amount should be the employee's total monthly election, including pre-tax and post-tax amounts.

## Health Reimbursement Arrangement (HRA)

If you are enrolling an employee after the plan start date, but he or she is eligible to be reimbursed for claims dating back to the start of the plan, provide the plan start date as the employee's effective date.



After you have entered the plan enrollment information, you will get a confirmation screen showing that the information has been updated:

| ٦ | Home                 | < Back to Employees   |
|---|----------------------|---|
| Ð | Imports              | Billy Brown     •       • Status: Active >  |
|   | Set up Contributions | Summary Balances Claims + Payments Enrollments Contributions  |
| Ē | Reports              | Active: 07/1/2021 - 06/30/2022 + New enrollment   |
| * | Employees            | Payment method: Check   |
| × | Tools                | FSA Healthcare 07/01/2021         Effective Jul 1, 2021           \$2,750.00 annual election         Active |
| ~ | Analytics            | Dependent Care 07/01/2021         Effective May 1, 2022           \$2,000.00 annual election         Active |
|   |                      |   |

# **Enroll New Participants**

If you wish to enroll a new participant, you will need to add the employee to the system, and then follow the enrollment steps outlined above.

To add a new employee, go to the Employees tab and then click the + New employee button:

| СН | ARDSNYDER™<br>a WEX™ company |                          |  | I                         |
|----|------------------------------|--------------------------|--|---------------------------|
| Â  | Home                         | Employees                | + New employee                             | <b>—</b>                  |
| ÷  | Imports                      | Name or ID               |  |                           |
|    | Set up Contributions         |                          |  |                           |
| P= | Reports                      |                          | Sort alphabetically (a to z) 🔻             |                           |
|    | Employees                    | John Jones     Active    | Effective Jan 1, 2000<br>SSN 5551 >        | FILTERS                   |
| 3  | Tools                        | • Suzie Sample<br>Active | Effective Jan 1, 2000<br>SSN ••• •• 5552 > | Employee status<br>Active |
| ~  | Analytics                    | Bob Smith<br>Active      | Effective Jan 1, 2015<br>SSN 2333 >        |                           |



You will be prompted to enter the employee's personal and employment information:

| ŵ | Home                 | < Back to Employees  |    |           |   |
|---|----------------------|----------------------|----|-----------|---|
| Ð | Imports              | Add employee         |    |           |   |
|   | Set up Contributions | Personal information | n  |           |   |
| ۵ | Reports              | First name           | MI | Last name |   |
| - | Employees            |                      |    |           |   |
| * | Tools                | Birth date           |    | Gender    | • |
|   |                      |                      |    |           |   |

A username and password will automatically be created. The username defaults to first name initial + last name + date of birth (ddmmyy). Click Add Employee to continue.

## **Important Notes**

- The Employer Employee ID field is as an optional field and should be used if it is your preferred number for reporting. (Former Nyhart clients should not use this field. Instead, use the Employee Number field. The Employee Number is an internal number you assign to the employee (e.g., payroll number). This number appears under the Employees tab and on all reports. For this reason, don't use the employee's social security number).
- Be sure to assign the correct payroll frequency to the employee for accurate posting of payroll contributions.
- The payroll frequency effective date is the employee's hire date.
- Hours worked per week is the average number of hours the employee works each week
- In order for participants to log in to their online accounts without first having to contact us, you must provide their email addresses.

## **International Participants**

In order to add an international address for a participant, you'll first need to add a U.S. address. Once you add the U.S. address, you can update it to an international address. To do so, update the Country field first. Then add the city, state/province, and zip code to the Address Line 2 field. Leave the actual City, State/Province, and Zip Code fields blank.

## Notes

- International addresses can't be added for HSA participants.
- Puerto Rico is listed as a U.S. state/province and isn't considered a foreign country.



When the employee has been added, you will see them on the Employees tab and can click on them to view a Summary. Click on the Enrollments page and follow the steps above to create an election.

| ŵ | Home                 | < Back to Employees |             |                                     |  |
|---|----------------------|---------------------|-------------|-------------------------------------|--|
| Ð | Imports              | Billy Bob           |             | View profile                        |  |
| İ | Set up Contributions | Summary             | Enrollments | Contributions                       |  |
| 4 | Reports              | Active enrollments  |             | Billy's activity                    |  |
| - | Employees            |                     |             | Status changed to Active Apr 4, 202 |  |
| × | Tools                |                     |             |                                     |  |

# **Update Election Amount During Open Enrollment Period**

Use the Employees tab to search for the employee you would like to update. Click on the employee. On the Summary page, click on the plan type that is changing under the Active enrollments:

| ŵ   | Home                 | < Back to Employees  |  |  |
|-----|----------------------|--|--|--|
| Ð   | Imports              | Billy Brown  View profile Status Active>   |  |  |
| Ħ   | Set up Contributions | Summary Balances Claims + Payments Enrollments Contributions   |  |  |
| 9   | Reports              | Active enrollments Viewall Billy's activity  |  |  |
| -24 | Employees            | FSA Healthcare 07/01/2021 Effective jul 1, 2021      So annual election Active      FSA Healthcare 07/01/2021 Effective jul 1, 2021      So annual election Active |  |  |
| ×   | Tools                | Dependent Care 07/01/2 Effective May 1, 2022 >     S2,000,00 annual election Active     Filed a claim for \$12.34     Feb 25, 2022                                 |  |  |
| ~   | Analytics            | Enrolled in FSA Healthcare 07/0 Jul 1. 2021  |  |  |

On the Enrollment page, click the white Edit enrollment button:

|     | Home                 | Status: Active >  |
|-----|----------------------|---|
| Ð   | Imports              | Summary Balances Claims + Payments Enrollments Contributions  |
|     | Set up Contributions | Active: 07/1/2021 - 06/30/2022 + New enrollment   |
| -   | Reports              | FSA Healthcare 07/01/2021         Effective Jul 1, 2021           \$2,750.00 annual election         Active |
| *** | Employees            | Dependent Care 07/01/2021         Effective May 1, 2022           \$2,000.00 annual election         Active |
| ×   | Tools                | MAY 1, 2022   |
| ~   | Analytics            | Annual electionEmployee contributionsPayroll deduction\$2,000.00\$0.00 of \$2,000.00\$250.00/Weekly         |
|     |                      | Remove         View contributions         View deductions   |
|     |                      | Edit enrollment   |



Update the enrollment information that you wish to change, then click Save:

| Effective date<br>5/1/2022             |                             | Enrollment status<br>Active |                                      |
|--|-----------------------------|-----------------------------|--------------------------------------|
| MPLOYEE ELECTIONS                      |                             |                             |                                      |
| Annual employee election<br>\$2,000.00 | Payroll frequency<br>Weekly |                             | Estimated payroll amount<br>\$250.00 |
| iew payroll deductions                 |                             |                             |                                      |
| LIGIBLE DEPENDENTS                     | 5                           |                             |                                      |
| o dependents exist.                    |                             |                             |                                      |

# How to Update a Participant's Status

When a participant goes on a leave of absence, terminates employment, or returns from a leave of absence, you will need to update their status. The date entered should be the date the new status takes effect.

Example:

If the participant's last day with the company is 7/31, the effective date of the terminated status would be 8/1.

**Important** 

- You must add a new status if a leave of absence occurs.
- You must remove a participant's status if it was changed in error or never occurred.

<u>Note</u>: You do not need to add a new status for participants enrolled only in a health savings account (HSA) when a leave of absence occurs.

To update a participant's status, Use the Employees tab to search for the employee you would like to update, then click the status hyperlink below the participant's name.

| ŵ          | Home                 | < Back to Employees  |  |  |
|------------|----------------------|--|--|--|
| Ð          | Imports              | Billy Brown  | View profile   |  |
|            | Set up Contributions | Summary Balances Claims + Payments Enrolling   | ents Contributions   |  |
| 4          | Reports              | Active enrollments View all  | Billy's activity   |  |
| -          | Employees            | FSA Healthcare 07/01/2021 Effective jul 1, 2021 ><br>\$2,750.00 annual election Active | The formation of the fo |  |
| ×          | Tools                | Dependent Care 07/01/2 Effective May 1, 2022 ><br>\$2,000.00 annual election Active    | Filed a claim for \$12.34 Feb 25, 2022   |  |
| <u>~</u> * | Analytics            | Balances View all  | Enrolled in FSA Healthcare 07/0 Jul 1, 2021 3  |  |



Update the status information that you wish to change, then click Add:

| Change JACK's status  |  |                              |     |
|---|--|------------------------------|-----|
| Status  |  | Effective date<br>10/16/2024 |     |
| Date status takes effect. For<br>last day is 3/1, then effective<br>Show status history | example, lf employee's date should be 3/2. |                              |     |
|   |  |                              | Add |

For additional assistance on how to use the status fields, refer to the scenarios listed below.

| Scenario  | Action  |  |
|---|---|--|
| A participant is no longer an employee.   | 1) Select the "Terminated" status and provide the effective date.   |  |
|   | 2) Click "Add" to submit your changes.  |  |
|   | Note: Review your plan documents to verify if the termination date should be end of month or event date.  |  |
| A participant begins a leave of absence and<br>can incur expenses through their medical                               | 1) Select the "Leave of Absence" status and provide the effective date.   |  |
| FSA or HRA. Contributions are made prior<br>to leave or are adjusted to a higher<br>amount when returning from leave. | <u>Note</u> : The effective date should reflect the date that the leave begins. For example, if a participant's last day of work is $3/31$ , the effective date should reflect as $4/1$ . |  |
|   | 2) Select all appropriate medical FSA or HRA plans that the participant is eligible to use while on leave.  |  |
|   | <u>Important</u> : Do not select to continue payroll deductions for plans<br>if the participant is prepaying or will have catch-up contributions<br>once returning from leave.            |  |
|   | 3) Click "Add" to submit the status change.   |  |
| A participant begins a leave of absence and continues contributions while on leave.                                   | 1) Select the "Leave of Absence" status and provide the effective date.   |  |
|   | <u>Note</u> : The effective date should reflect the date that the leave begins. For example, if a participant's last day of work is 3/31, the effective date should reflect as 4/1.       |  |
|   | 2) Check all applicable plans that will have continued payroll deductions collected during leave.   |  |
|   | 3) Select all appropriate medical FSA or HRA plans that the participant is eligible to use while on leave.  |  |
|   | 4) Click "Add" to submit the status change.   |  |



| Scenario  | Action   |
|---|--|
| A participant begins a leave of absence and cannot incur expenses while on leave. | 1) Select the "Leave of Absence" status and provide the effective date.  |
|   | <u>Note</u> : The effective date should reflect the date that the leave begins. For example, if a participant's last day of work is 3/31, the effective date should reflect as 4/1.                          |
|   | 2) Click "Add" to submit the status change.  |
|   | <u>Important</u> : If the participant is unable to incur services while on LOA, do not check any boxes under "Continue payroll deductions for" or "Allow services to be incurred while on Leave of Absence." |
| A participant returns from a leave of   | 1) Select "Add new status."  |
| absence.  | 2) Click "Next."   |
|   | 3) Select the "Active" status and provide the effective date.  |
|   | 4) Click "Add" to submit your changes.   |
| An error was made when updating an  | 1) Select "Change status history."   |
| employee status.  | 2) Click "Next."   |
|   | 3) Check the box to the right of the status that should be removed.  |
|   | 4) Click "Remove status."  |

## **Important Note**

Even though there are other options listed, please only use Active, Terminated, and Leave of Absence per the applicable scenario to ensure plan rules function as designed.



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