



Employee Quickstart Guide

Employee Portal Overview

Your Company offers a variety of benefits that are designed to make your life easier, provide you with great coverage that is affordable to you and support your goals for the future. To that end, we'd like to welcome you to the Online Employee Portal.

This one-stop portal allows you to manage your tax-favored accounts (Flexible Spending Account (FSAs), Health Reimbursement Arrangement (HRA), Health Savings Account (HSA), and Transportation Management Account (TMA) that includes Parking and/or Transit and gives you 24/7 access to view step-by-step instructions on how to:

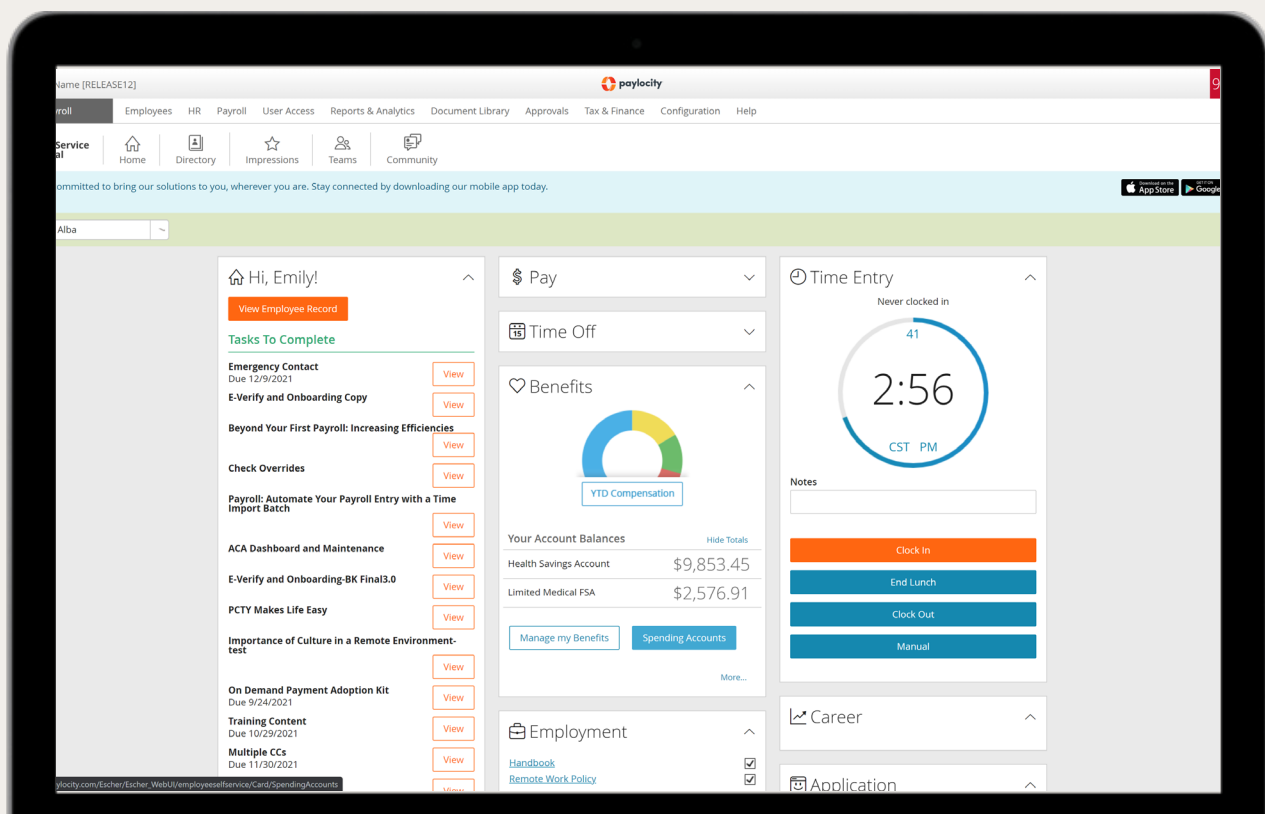
- File a claim online
- Update your personal profile information
- View account balance and activity
- View your claims history and payment (reimbursement) history
- View debit card and direct deposit information
- Download account summary and tax statements

For a quick overview of your Spending Accounts dashboard, check out this [video](#).

Access Spending Accounts

Paylocity provides a secure portal through which all authorized users can gain access to their benefit information. This section provides step-by-step instructions for secure access and login to the Employee Portal.

1. Navigate to <https://access.paylocity.com/>
2. Enter your company ID, username, and password.
3. Select Self Service Portal from the main menu.
4. Select Spending Accounts from the Benefits card to display the overview tab of Your Spending Accounts. OR navigate to Spending Accounts from the main menu.



Your Spending Accounts Dashboard

Your Spending Accounts is a dashboard that allows you to quickly and easily access and manage your account information.

Overview

From the overview tab, you can view your balances, contributions, recent transactions, and investments.

Transactions

Recent Transactions, you see a summary of your most recent transactions, along with the status. Click View Transaction Details to expand more info.

File a Claim

File a claim for FSA, TMA, or HRA accounts.

1. Click the File a Claim button to submit a new claim.
2. Enter the on-screen info, click Next, and make sure the info is correct.
3. Check the box to verify you read and agree to the info and disclaimer.
4. Then click Submit.

Investments

If you have an HSA account, you can manage investments by clicking the My Investments link.

Make an HSA Transaction

5. From the **Make an HSA Transaction** screen, select the **From** and **To** accounts for the transaction. Note: If you choose your bank account in the From and HSA in the To, you'll be making a contribution. If you choose your HSA in the From and either your bank account or a check in the To, you'll be making a distribution (withdrawal).
6. Click **Next**.
7. Choose the frequency of the transaction (one-time, or sheduled). Click **Next**.
8. Enter the transaction details and amount. Click **Next**.
9. Review the information. Click the checkbox to confirm you've read, understand, and agree.
10. Click **Submit** to complete the transaction request. You must answer a security question to complete the transaction and you'll receive a confirmation screen.

View Transactions

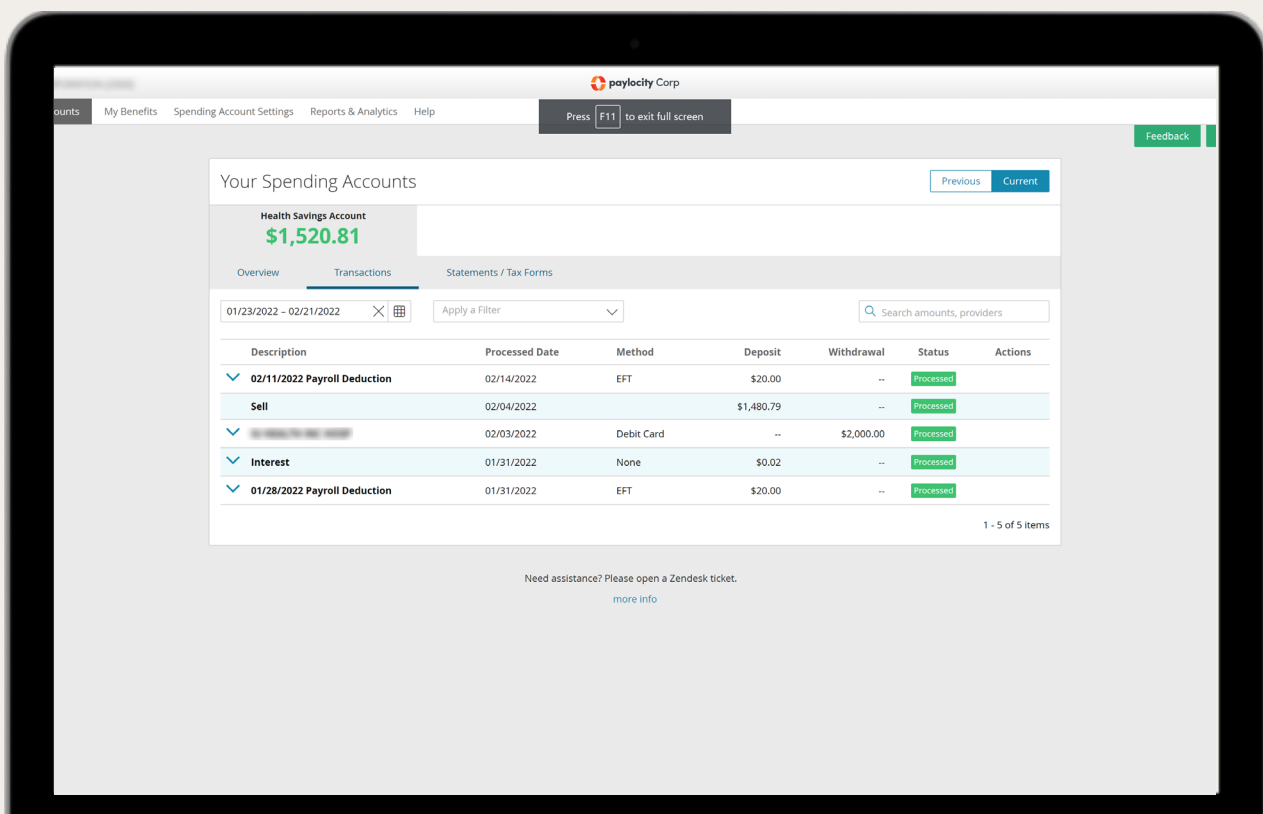
The Transactions tab shows a full list of all your transactions for a given time period.

1. Select the Transactions tab.
2. To change the date range, select the calendar icon, and choose a day or range. You can also filter by method or status.
3. Click the carrot in front of each transaction to expand the details.

Transactions may include:

- Debit card transactions
- Contributions
- Distributions
- Reimbursements
- Interest

Some spending accounts may be eligible for a debit card. If that's your case, you'll receive two Paylocity debit cards in the mail. This gives you instant access to your elected funds, and you can pay for your eligible expenses with a swipe of the card.



The screenshot displays the Paylocity web interface for a Health Savings Account. The account balance is \$1,520.81. The 'Transactions' tab is active, showing a list of transactions from 01/23/2022 to 02/21/2022. The table includes columns for Description, Processed Date, Method, Deposit, Withdrawal, Status, and Actions. The transactions listed are:

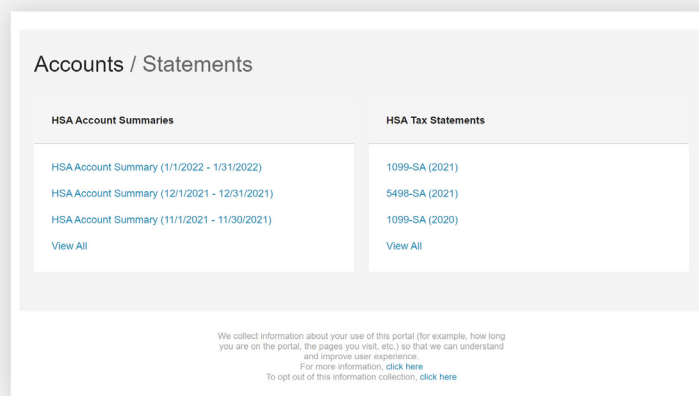
Description	Processed Date	Method	Deposit	Withdrawal	Status	Actions
02/11/2022 Payroll Deduction	02/14/2022	EFT	\$20.00	--	Processed	
Sell	02/04/2022		\$1,480.79	--	Processed	
	02/03/2022	Debit Card	--	\$2,000.00	Processed	
Interest	01/31/2022	None	\$0.02	--	Processed	
01/28/2022 Payroll Deduction	01/31/2022	EFT	\$20.00	--	Processed	

At the bottom of the screen, there is a footer that reads: "Need assistance? Please open a Zendesk ticket. [more info](#)"

Access Statements and Tax Forms

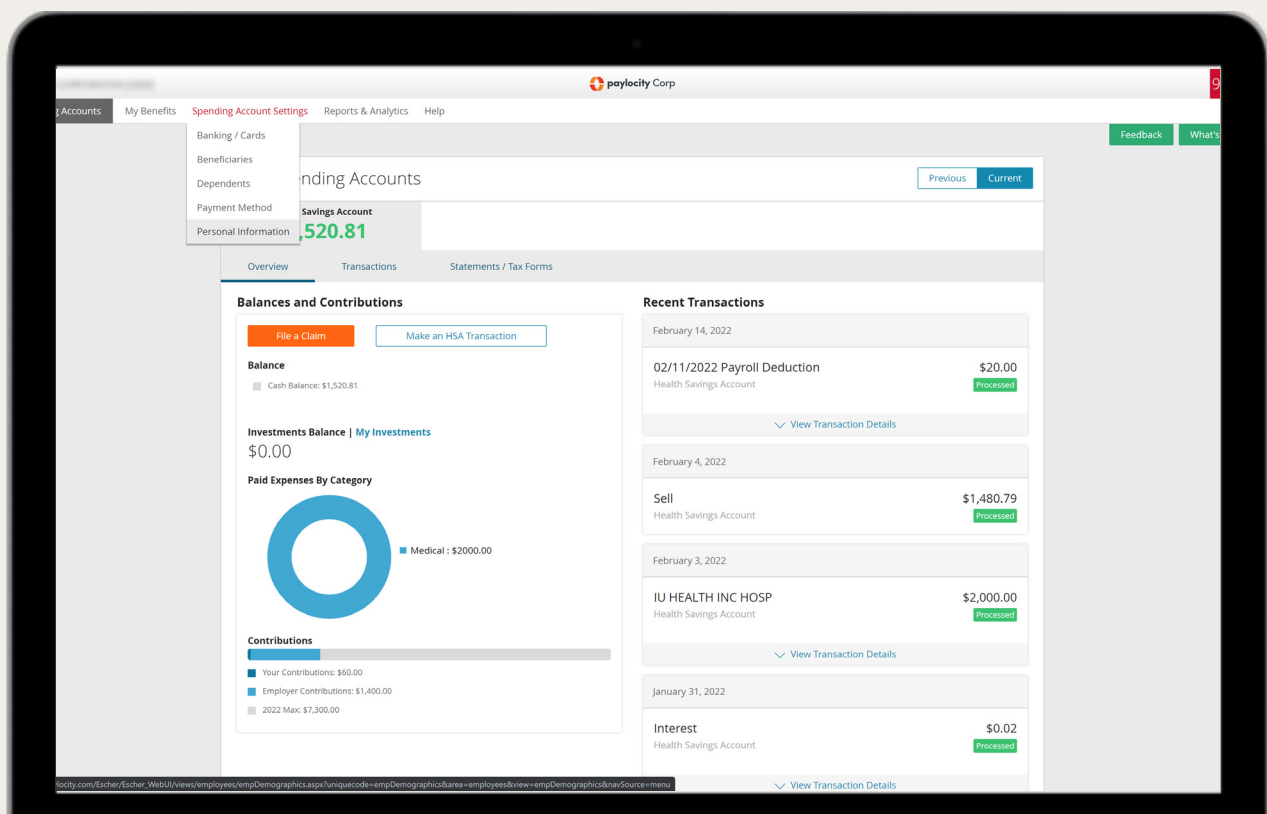
If you want to access any of your statements or tax documents, you can do that from the Statements/Tax screen.

1. Select the Statements / Tax Forms tab.
2. Click any of the documents to open a downloadable PDF.



View Spending Account Settings

Quickly view information about your spending account cards, beneficiaries and dependents, payment method and, personal information from the Spending Account Settings tab in the main menu.



Mobile

Manage your benefits anywhere, 24/7 with our mobile app. Convenient, real-time access to all your benefit accounts makes it easy to view recent account activity along with the ability to:

- Submit Claims
- Check Account Balances
- Track Healthcare Expenses
- Upload Pictures of Receipts
- Receive Text Alerts
- View Message Center
- Access Eligible Expense Scanner
- Accept HSA Custodial Agreements
- Complete HSA Transactions
- View HSA Investments

Available for all iPhones, iPads, and Android devices. Download at iTunes or Google Play.