



Employer HSA User Guide

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Accessing My Flex Account Online

- Login at www.myflexaccount.com

Register | Login

FLEX Welcome to **myflexaccount.com**

My Accounts Enrollment Resources Search...

Navigation

- Contact Us
- About Us
- Resources and Education

Individual Login

Username:

Password is entered on next page.
Forgot your Username? [Click here.](#)

New User? [Click here to register.](#)

Employer Login

[Click here to log in.](#)

[Click here to learn about Flex.](#)

FSA Store
Soothe your allergies with FSA-eligible products!

Access at your Fingertips!
Get the new My Flex Account Mobile App.
[Learn More](#)

FSAs
Click here to learn more about Healthcare and Dependent Care Flexible Spending Accounts.

HRAs
Click here to learn more about Health Reimbursement Arrangements.

HSAs
Click here to learn more about Health Savings Accounts.

Commuter Plans
Click here to learn more about Transit & Parking Reimbursement Accounts.

Please note, this site is designed for the most recent version of [Internet Explorer](#), [FireFox](#) and [Chrome](#).

- Click to log in under the Employer Login Box

Self-Service Login

Please enter your User ID & Password below to access your secure account.

User ID:

Password:

Please note the following:

- Your administrator must create an account for you prior to your first login.
- If you've forgotten your password, please contact your designated Administrator to have your account password reset.
- The application is best viewed at 1280x800 resolution or greater.
- If you have popup blockers installed, you will need to disable them to use the Self-Service Portal.

- Enter your username and password. (Flex will provide a username and password for login).
- You will be prompted to update your password upon first login
- Once you have logged in you will arrive at the My Flex Account Employer Home Page

Employer Home Page

****Tip - To return to the Employer Home Page at any time; click on My Account/Home on the right side of the Menu bar****

What can you Quickly Access From your Employer Homepage?

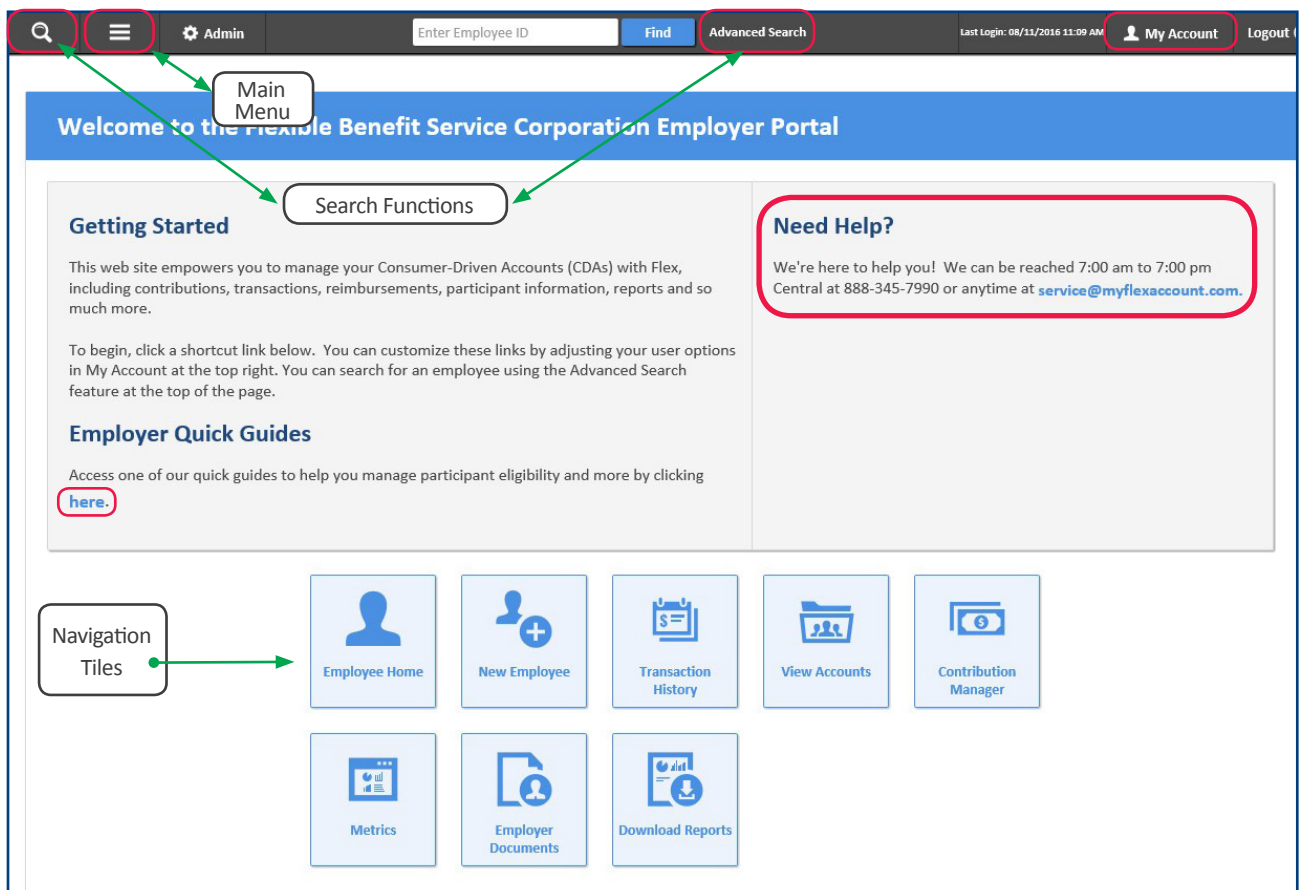
- ✓ **Main Menu** – This tab is the three lines located at the top left corner of your menu bar. You will refer to this tab when making eligibility changes online, accessing reports, viewing claims data, accessing card information and more.
- ✓ **My Account** – This tab at the top right corner of your menu bar, gives you an option to return to the Home Page, update your user options (Navigation Tiles), or log out.
- ✓ **Search Functions** –

Click on “Advanced Search” in the top center of the menu bar to search for employees. ****Tip –you can just click on the search button with the pre-selected criteria to pull up a list of all employees****

-Or-

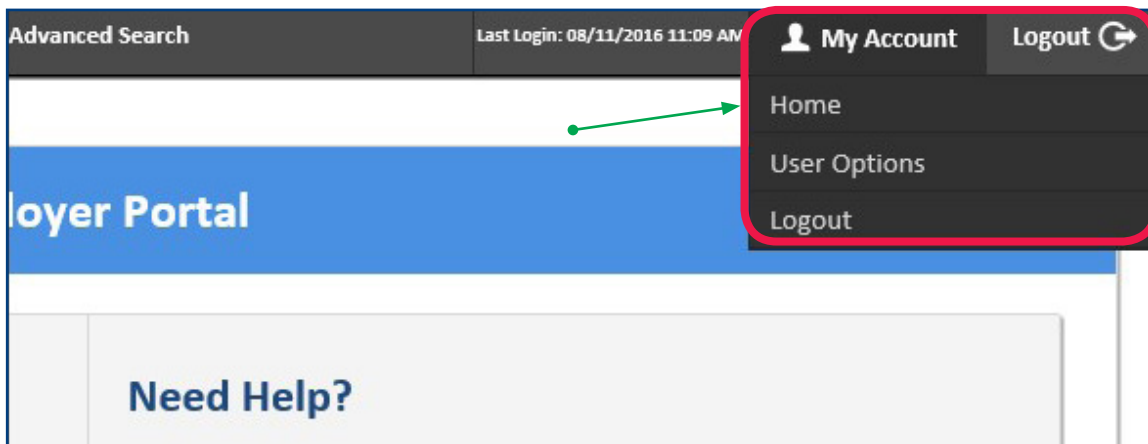
Click on the “Magnifying Glass” on the top left corner of your menu bar. ****Tip - If you search by first or last name, you can type the first letter of the first or last name and a list of applicable employees will appear, otherwise, you will need to type the entire first or last name for the employee to appear****

- ✓ **Navigation Tiles** – These are the quick link icon boxes located in the center of your screen. You can have up to 10 Navigation tiles, and you can configure these to your liking by updating your user options under the My Account Tab. (See page 4 for additional details)
- ✓ **Employer Quick Guides** – Access all forms and guides by selecting “click here” under Employer Quick Guides
- ✓ **Need Help?** – Contact our customer service team via email or find our Customer Service phone number and hours of operation under the “Need Help?” section of the Employer Home Page.



User Options and Navigation Tiles

- Click on My Account / User Options at the top right of your Menu bar



- Under “User Options” you can update your password or personal information for authentication purposes

****Please note that any updates made to your email address will not automatically update your email address for funding email notifications. Funding email updates would need to be provided to Flex Customer Service by emailing service@myflexaccount.com ****

A screenshot of the 'User Options' page. The page has a white background with blue and yellow accents. The title 'User Options' is at the top. Below it are several sections: 'Change Password' with fields for current, new, and confirm passwords; 'Personal Information for Out-of-Wallet Authentication' with fields for address, city, state, zip code, phone, birth date, and SSN; 'Change E-mail' with fields for user ID, current, new, and confirm email; 'Links' with a list of available links and a list of selected links; and 'WCA Navigator Options' with radio buttons for shortcut link placement and a dropdown for employee default search criteria. A green arrow points from the 'Links' section to the 'Selected Links' list.

- Under “User Options” you can customize the Navigation Tiles on your Home screen for quick and easy access to various tasks.
- Default Navigation Tiles will already be displayed on your home page, but these can be updated to fit your needs.
- Up to 10 tiles can be selected to appear on your Employer Home Page.

- These are some of the suggested or commonly used Navigation Tiles
 1. **New Employee** - This can be used to quickly and easily add a new employee
 2. **Download Reports** - This can be used for easy access to view reports online
 3. **Participant Users** - This can be used to determine which of your Employees have registered online and to view their online registration status
 4. **Metrics** - This provides data on number of employees, cards, statuses, and usage
 5. **Contribution Manager** - If applicable to your benefit plans, this can be used to post contributions to the Employees HSA
 6. **Enrollment Summary** - This provides an overview of employee enrollment for any selected benefit
- To update the Navigation Tiles on your Home Page, select the applicable option under the “Available Link” box on the left and click on “add” to move your link into the “Selected Link” box. Click “Save” at the bottom of your screen. (See previous screen-shot)
- Any links in the selected links box, should appear as a Navigation Tile on your home screen for quick access.

How to Search for an Employee or Employee Account Information

Find an Employee

There are multiple ways to search for an employee on MyFlexAccount

1. Click on the Magnifying Glass in the top left corner of the Menu Bar – Select the “search by” drop down and search by entering in any of the criteria below.

****Tip - If you search by first or last name, you can type only the first letter of the first or last name and a list of applicable employees will appear; otherwise you will need to type the full first or last name in order for that employee to display****

The screenshot displays the MyFlexAccount user interface. At the top, there is a navigation bar with a search icon, a menu icon, an 'Admin' button, and a text input field labeled 'Enter Employee ID'. Below the navigation bar, a 'LINKS' section contains several tiles: 'Employee Home', 'New Employee', 'Transaction History', 'View Accounts', 'Contribution Manager', 'Metrics', 'Employer Documents', and 'Download Reports'. Below the links, there are tabs for 'EMPLOYEE' and 'DEPENDENT'. Under the 'EMPLOYEE' tab, there is a 'SEARCH BY' dropdown menu that is open, showing a list of search criteria: 'Employee ID', 'First Name', 'Last Name', 'Last Name, First Name', 'SSN', 'Card Number', 'Email Address', 'Health Plan ID', 'PBM ID', 'Address Line 1', 'Phone Number', 'Product Partner Account Number', and 'Alternate ID'. To the right of the dropdown is a 'Find' button. The background of the interface is light gray with blue accents.

- Click on “Advanced Search” in the center of your Menu bar. Select any of the criteria below, and click search. This will bring up a list of all employees, or just those that meet the criteria you have selected. If you leave your pre-selected criteria, and click search, a list of all of your employees will be displayed.

****TIP – you can click on any of the blue links within that employee name for quick access to that applicable section** for example you can click on the card number and that will direct you to the debit card section of that employee's account.**

Search Employees
Advanced Search:

Note: The maximum number of employees returned by the system is 2000. To find an employee, it is highly recommended to enter search criteria filters.

Admin: Flexible Benefit Service Corporation

Employer: DEMO EMPLOYER [DEMO EMPLOYER] [List All]

Plan Year: --All--

Benefit Plan: --All--

Division: --All--

Employee Status: ☒ New ☒ Active ☒ Permissive ☒ Tempinactive ☒ Terminated

First Name:

Last Name:

Employee ID:

Card Number:

SSN:

Product Partner Account Number:

Please enter the complete full name OR ONLY the FIRST letter of the name. Search based upon partial names greater than one letter are supported.

Search Cancel

Please select the employee from the link below

Employee	Employer	ID	Card #	Has Dependents	Employee Status	Spouse	Has Accounts	Email Address	Division	Eligibility Date - Termination
DEMO, FLEX	DEMO EMPLOYER	ProdFlexDemo	XXXX-XXXX-XXXX-1646	No	Active		Yes	ashley.wyckoff@alegeus.com		
Johnson, Jean	DEMO EMPLOYER	jjohnson1234	XXXX-XXXX-XXXX-7334	No	Active		Yes	jjohnson@noreply.com		
Jones, Tom	DEMO EMPLOYER	tjones3044		No	Active		Yes	tjones@email.com		

- If you know the full employee ID, you can also use the “Find” button on your Menu Bar by entering in the employee ID (first initial, last name, last 4 digits of SSN)

View Employee Account Information

- Once you have selected your employee, click on the “Account” tab under that employee for quick access to the account section
- You can also access the account information by clicking on Main Menu/Employee/ Accounts/Benefit Account (or Dependent Account if viewing dependent information)

EMPLOYEE / Accounts
Benefit Accounts
Please find the employee

Employee ID: [] **Find** Advanced Search

Jones, Tom

DETAILS		DEPENDENTS		NOTES	
EMPLOYEE ID	ADMINISTRATOR	EMPLOYER	EMPLOYER ID	STATUS	
tjones3044	Flexible Benefit Service Corporation	DEMO EMPLOYER	FBSDEMOPROD	Active	
STATUS	ELIGIBILITY DATE	TERMINATION DATE	USER ID	REIMBURSEMENT METHOD	
Active	1/1/2016		tjones16	Check	

[Home](#) [Demographics](#) **[Accounts](#)** [Cards](#) [History](#)

The employee elected the following flex accounts. Click the Account Type to edit the account. To delete, select the account by clicking the checkbox next to it and click the DELETE button

Plan Year: []