

# How to Add a New Employee/Benefit



1. Once you have logged into your account, select the **"Employees"** tab in the top navigation bar and click **"Add."**
2. Leave the import from another system default as **NO** and click **"Next."**
3. Complete all required fields in the **Employee Details** and **Employee Address** section, and enter the date of hire in the **"Date of Hire"** field and the benefits effective date in the **"Effective From"** field. Then click **"Next."**
4. Click **"Add"** to enter dependent information, if applicable, then click **"Next"**. If there are no dependents to enter, then click **"Next."**
5. Review the **Employee Details** for accuracy, and select **"Add a benefit to the employee"** shown below the dependent details. Then click **"Next."**
6. On the lower portion of your screen, keep the **Segment** default as **"Group"** and select the appropriate benefit from the drop-down menu provided. The screen will automatically display the benefit details.
7. Under the **Add Benefit** section, review the benefit information and update **"Effective From Date"** \*, then click **"Save."** You will receive a pop-up message indicating that the benefit has been added successfully. Click **"Ok."**
8. To finalize the benefit addition process, select the **"Benefits"** tab located directly above the employee's demographic information (not the top navigation bar), and double-click on the benefit you have just entered.
9. Select the **"Plan Info"** tab located below the details display and click **"Add."** Choose **Flex TPA** as the carrier, click **"Select"** and then **"Save."**
10. Select the **"Contribution Schedule"** tab and click **"Add."** Choose the appropriate contribution schedule and click **"Save."**
11. Select the **"Election Info"** tab:
  - a. For HRA, select **"By Tier"** as the **Contribution Method**, choose the appropriate tier from the drop-down menu and click **"Save."**
  - b. For FSA, select **"By Value"** as the **Contribution Method**, click on **"Employee Amount"** and enter the annual election amount in the field provided. Then click **"Save."**

*\*The effective date defaults to the employer plan effective date, not the employee's benefit effective date.*