EMPLOYER PORTAL QUICKSTART GUIDE

CPI

Welcome to **CPI** Employer Portal. This one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as **Flexible Spending Accounts (FSAs), and Health Reimbursement Arrangements (HRAs).**

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 over 50 scheduled reports or notifications
- Access history of reports and notifications
- Load data import files
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Access history of reports and notifications
- Add, update and enroll employees
- Add and manage recurring contributions

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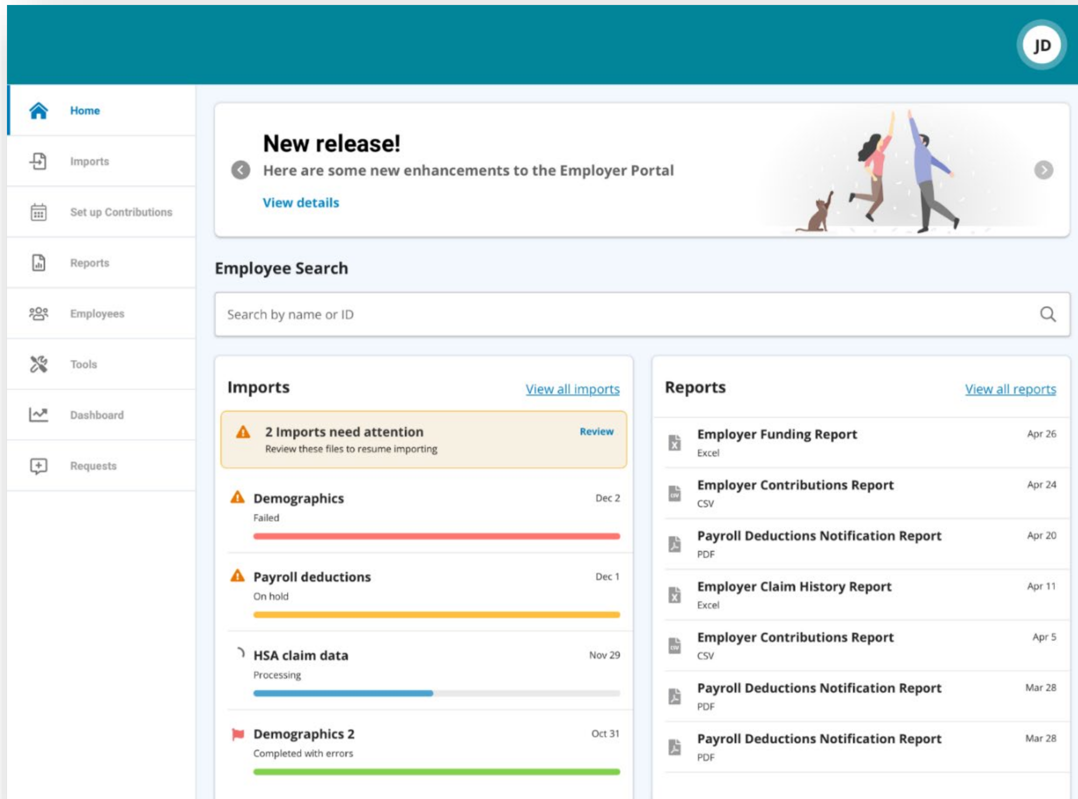
HOW DO I GET ACCESS TO THIS PORTAL?

1. You and your assigned contacts will be sent a username and a temporary password.
2. Navigate to www.mycpiteam.com. Choose FSA Employer Login.
3. Upon first login, you will be prompted to change the password.
4. Once password is updated and confirmed, click **Login.**



The **Home Page** is easy to navigate. Everything you need to efficiently and effectively manage your Consumer Driven Healthcare (CDH) Accounts is found on the home page. From the home page, you can:

- Check on status of data import files
- Set up recurring contributions
- View employee-level data
- Review recent reports
- View the employer dashboard

You can also access the tabs on the left side of the page for easy navigation.

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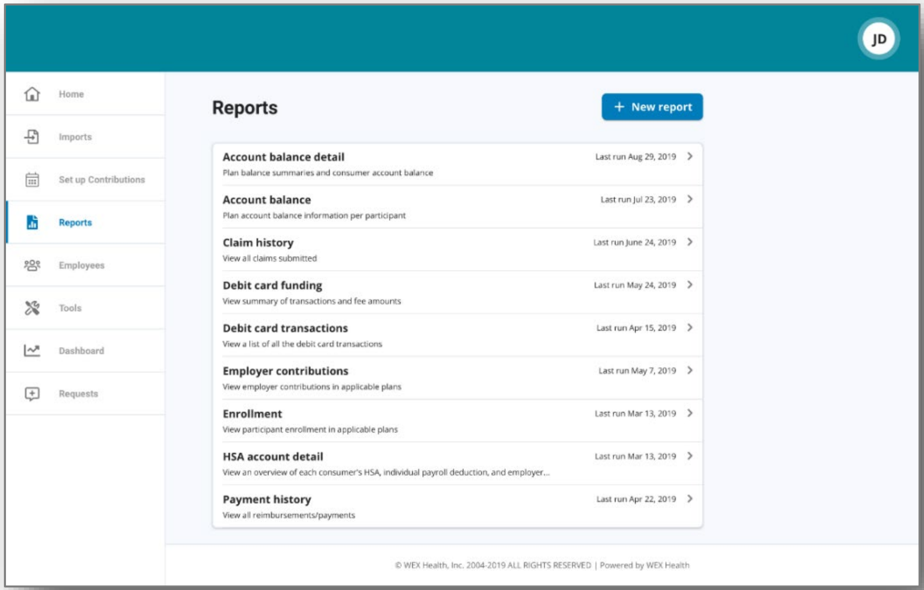
HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. Select the **Reports** tab,
2. Select the relevant enrollment, financial, contribution or plan information report desired and it will automatically be displayed.
3. If there is a report that you need, but do not see, you can contact **CPI** to request it.

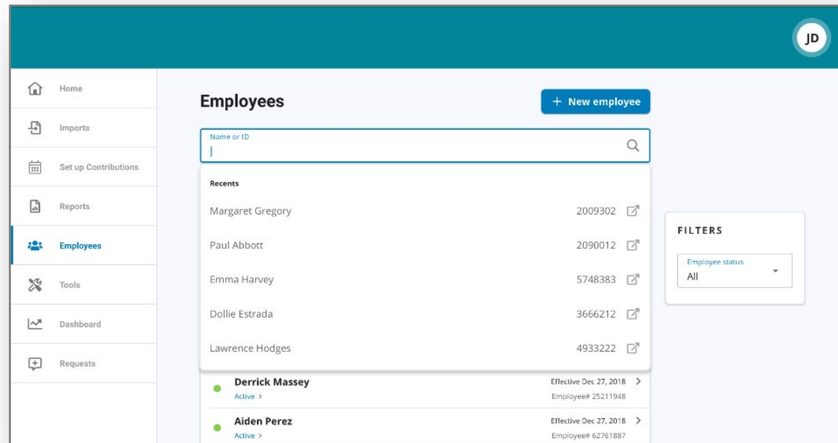


WILL I BE ABLE TO RUN MY OWN REPORTS IF NEEDED?

1. Select the **Reports** Tab.
2. Click the New Report button.
3. Select the appropriate report type.
4. Complete the report detail fields.
5. Click **Request**.
6. The report will generate. If you selected the option an email is sent to you when the report is available.

WHAT KIND OF EMPLOYEE-LEVEL DATA CAN I ACCESS?

1. Select the **Employees** tab, you can get real-time data on all employees.
2. You can search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access the following information:
   a. Summary
   b. Enrollments
   d. Activity
   e. Claims + Payments
   f. Enrollments
   g. Contribtuions
   h. Advance



HOW DO I GET ACCESS FOR A NEW HR REP OR ADD NEW EMPLOYEES?

1. Select the **Requests** tab.
2. Under Request Type, there is a drop down menu with over 10 options to choose from.
3. Choose the request type, i.e. add a new employee, add employer contact or change payroll deductions, then select a consumer from a list of employees, enter the request details and/or attach a document or file.
4. Click Submit Requests
5. All requests are securely delivered.

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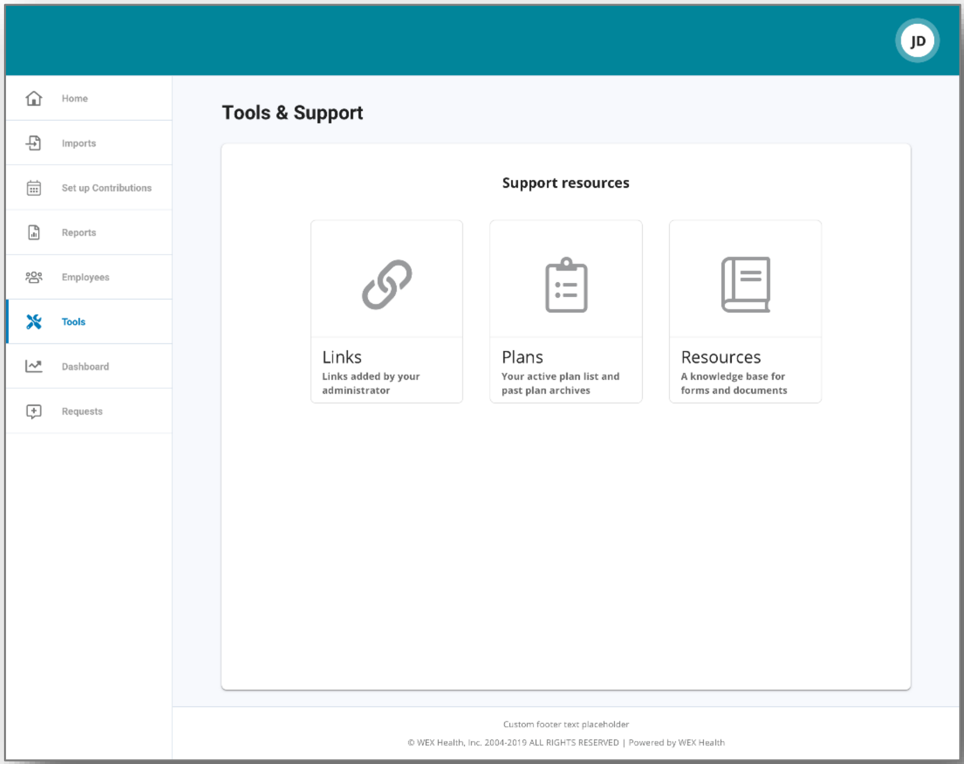
WILL I BE ABLE TO ACCESS ANY OF MY PLAN INFORMATION?

1. Under the **Tools** tab, you will find options to view the same **Plans** info as the employees for all active and inactive plans.
2. Support resources available here are:
    - Links
    - Plan Details,summaries, and Rules
    - Resource documents



WHERE WOULD I ACCESS REQUIRED FORMS?

1. Under the **Tools** tab and the **Resources** tile.
2. In this section, you can download and print any forms needed.
3. You will also have access to any other documents or custom materials related to your plans in this tab.

WILL I BE ABLE TO ADD/ENROLL/UPDATE EMPLOYEES?

1. Under the **Employees** Tab.
2. Click the **New Employee** button.
3. Enter the Personal and Employment Information.
4. Click **Add** New Employee.
5. Select the **Enrollments** link.
6. Click **New Enrollment**.
7. Select the **Plan Year** and click **Next**.
8. Select one or more of the plans listed and click **Next**.
9. Sleect the **Primary Payment Method** and click **Next**.
10. Complete the enrollment **Plan Details** for each plan listed and click **Submit**.

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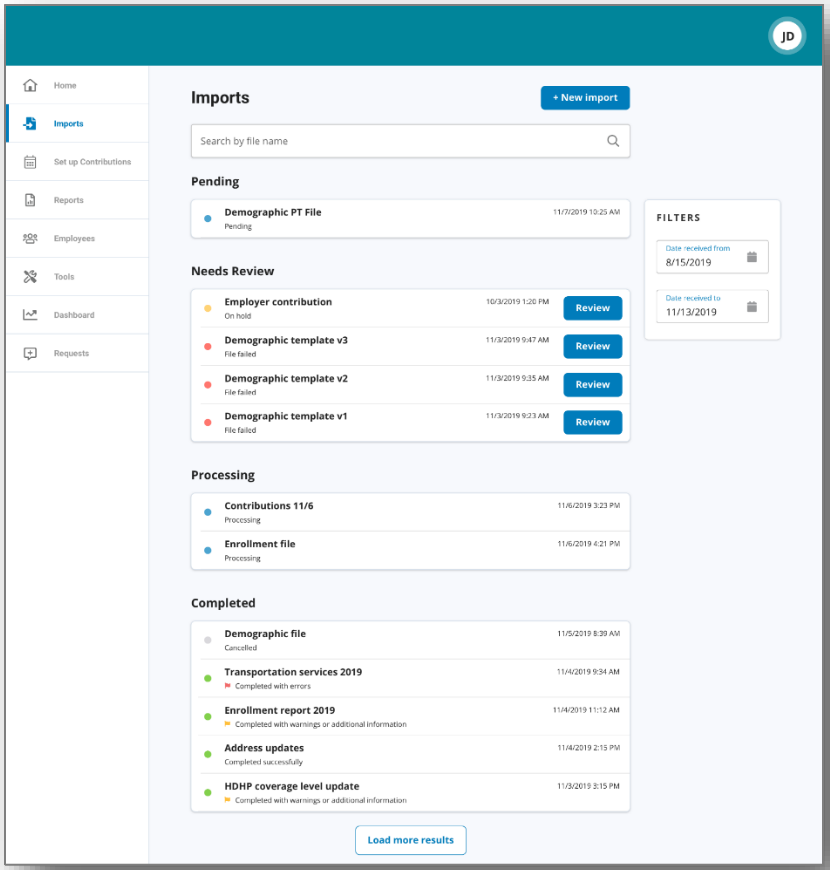

WILL I BE ABLE TO UPDATE AN EMPLOYEE STATUS?

1. Select the **Employees** tab.
2. Search and select the employee using first name, last name, or employee identifier (employee ID or SSN)
3. Select your option from the **Status** drop-down menu.
4. Enter the status **Effective Date**.
5. Click Show status history.
6. Click Add.

ONE OF THE FEATURES OF THE PORTAL IS THE ABILITY TO IMPORT DATA. HOW DOES THAT WORK?

1. Under the **Imports** tab you can import demographic, enrollment and contribution files directly into the portal using standard excel or CSV formatted import files.
2. Once in the Imports home page, select **New Import**.
3. Select the **Import Type** you would like to import.
4. Click **Download Template** and then click **Next**.
5. Check for field matches, click **View file setup requirements** link to review the fields.
6. Enter or paste your data into the template.
7. Save the template as CSV or Excel to a location you can remember.
8. Click **Browse** to upload the file.
9. Click **Import**.

Once imported, any errors are displayed and can be easily updated by clicking the **Review & Fix** button. Click the **Fix All** button for the record line and you can correct the error(s). Then, click **Queue Record** once corrections are made. Then click the **Resubmit File** button to import the corrected records.