



MyFlex

Employer User Guide



MyFlex Employer User Guide

This guide will help you get started using the PSA (PacificSource Administrators) MyFlex website. Here you will find step-by-step instructions for the features you will likely use most often.

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Note: *The MyFlex website supports new mid-year hires, new elections (for both new hires and newly benefit eligible employees), terminations and demographic changes. The MyFlex website does not support mid-year election changes. For mid-year election changes please send a completed Employee Change Form to psamembership@pacificsource.com.*

If you have any questions or need further assistance, please contact our Membership Department at (541) 225-2761 or psamembership@pacificsource.com.

Getting Started and Managing User Accounts

Getting Started

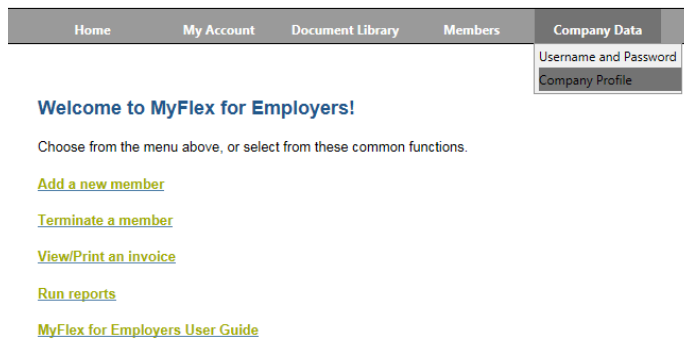
1. Navigate to the PacificSource Administrators secure web portal:
<https://hrbenefitsdirect.com/PSA/signIn.aspx>
2. If you have never logged in before, your username will be your PacificSource Administrators Group ID (found at the bottom of an invoice) preceded by the letter "G". Your password is your federal tax ID that you have provided to us including the dash. If you have previously logged in and changed your username and password you will log in with that unique information.

If you need assistance logging in, please contact our Membership Department.

Note: You may be prompted to enter or confirm your email, change your username and password, and set up security questions.

Managing User Accounts (Adding, Editing or Deleting User)

1. On the Home page select **Company Data > Company Profile** from the drop-down menu.



2. Select the **User Accounts** tab.

Company Profile

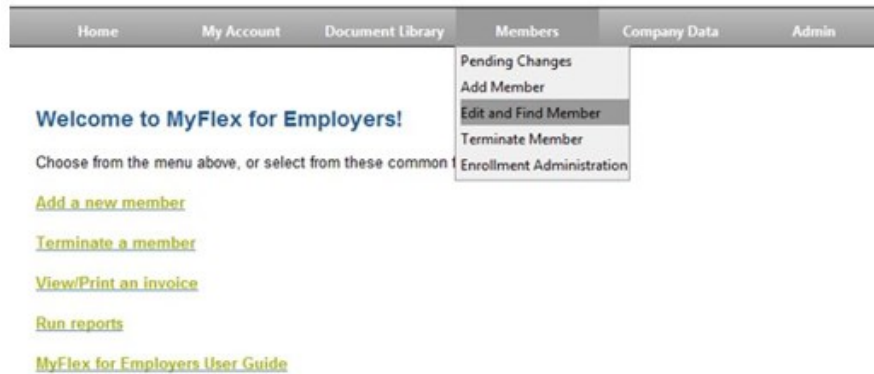
An e-mail address is required for the primary contact and for each user account.

The screenshot shows the "User Accounts" tab selected in a navigation bar. Below the navigation bar, there is a table with columns: Name, Phone, Email, Username, Password, Confirm Password, and Action. The first row contains the following data: Name: Administrator, Phone: 123-456-7890, Email: Administrator@Training.com, Username: Username, Password: ***** (masked), Confirm Password: ***** (masked). To the right of the first row are three buttons: Update, Delete, and Add User. Below the first row are empty input fields for each column, and an Add User button is positioned at the bottom right of the table.

3. To **add** a user, complete the Name, Phone, Email, Username, Password, and Confirm Password fields and select **Add User**.
4. To **edit** a user, edit the necessary fields and select **Update**.
5. To **delete** a user, select **Delete**.

Viewing Members

1. On the Home page select **Members > Edit and Find Member** from the drop-down menu.



2. Enter the **Last Name** (or at least the first two letters of the Last Name) and select **Search**.
 - Leave the “Search For” field blank to view all Members.
 - Select the “Include Terminated Members” box, for the search to include terminated members.
3. Once your results are displayed;
 - Select the Members name, to go to the Member Profile or
 - Select an option from the **Choose an action** drop-down menu and select **GO**.

Find Member(s)

To search by last name, enter at least the first two letters. To narrow your search, enter more letters. The field is not case-sensitive.

Search For:

Search By:

Include Terminated Members

Primary Member Only

(If Search For Criteria not entered, then it will take some time to load all members in the company)

Name	Company	Member ID	Dependent Code		
<u>MEMBER_ONE</u>	_TRAINING COMPANY	ZZMAN252153	00	Choose an action	<input type="button" value="GO"/>
<u>MEMBER_TWO</u>	_TRAINING COMPANY	ZZMAN252154	00	Choose an action	<input type="button" value="GO"/>

Choose an action

- Reset Password
- Reset and Email Notification
- Reset Security Answers
- Terminate
- Unlock Account
- View

Add New Members and Elections

Important: To avoid duplicate member entries, please follow the steps in the preceding **Viewing Members** section to ensure that an employee does not already exist in our database.

1. On the Home page select the **Add a new member** link.



Welcome to MyFlex for Employers!

Choose from the menu above, or select from these common functions.

[Add a new member](#)

[Terminate a member](#)

[View/Print an invoice](#)

[Run reports](#)

[MyFlex for Employers User Guide](#)

2. In the **Plan Stage** drop-down select **Current Year(s)**.
3. In the **Group Options** drop-down select **Add New Member**.



4. Enter the member information.
 - a. Secondary ID: This the member's PacificSource Health Plans ID number. If unknown or not applicable, please leave blank.
 - b. *Secondary SSN: This is the member's ***Social Security Number, which is required for an Individual HRA** (Health Reimbursement Arrangement) plan.
 - c. Fields marked with a red asterisk (*) are required fields.
 - d. Employment Date: Employee's date of hire.
 - e. Enrollment Date: Benefit effective date.
 - f. Flex Enrollment Date: Benefit effective date.
 - g. Select the **Add Debit Card** box, if your company offers the Benny card and you would like to order a card for the member.
Note: Debit card is not available for Dependent Care Expenses or Parking / Transit only enrollees.
 - h. Select **Save**.
5. Confirm the **Member** and **Add Mid-Year Election** are selected.



Select a Plan:

Plan	Start	End
DEPENDENT CARE EXPENSES	1/1/2016	12/31/2016
HEALTH RELATED EXPENSES	1/1/2016	12/31/2016

6. Select the **Plan** and select **Next**.
7. Confirm / update the **Election Start Date** (plan effective date) and **Payroll Start Dates** (first pay date with deduction) and select **Next**.

Plan:DCE(1/1/2016-12/31/2016) Description: DEPENDENT CARE EXPENSES Year:2016

Enter the effective dates for the election:

Election Start Date: Election End Date:

Payroll Start Date: Payroll End Date:

8. Entering **employee** funded elections;
 - a. Confirm / update **Employee Payroll Calendar**.
 - b. Under **Employee (EE) Pre-Tax**, enter the **Annual or Per Pay** Amount (the alternate will auto-calculate based on entry).
 - c. Select **Next**.
9. Entering **employer** funded elections;
 - a. Confirm / update **Employer Payroll Calendar**.
 - b. Under **Employer (ER) Pre-Tax**, enter the **Annual or Per Pay** Amount (the alternate will auto-calculate based on entry).
 - c. Select **Next**.

Plan:DCE(1/1/2016-12/31/2016) Description: DEPENDENT CARE EXPENSES Year:2016

Select the calendar(s) and enter the amounts for the election:

Employee Payroll Calendar: MONTHLY 31ST (31ST OF EVERY I)

Employee(EE) Pre-Tax: Annual Per Pay

Employee(EE) Post-Tax: Annual Per Pay

Employer Payroll Calendar: MONTHLY 31ST (31ST OF EVERY I)

Employer(ER) Pre-Tax: Annual Per Pay

Employer(ER) Post-Tax: Annual Per Pay

10. Select a **Reason for Change**, enter **Additional Comments**, if applicable and select **Finish**.

Reason for Change:

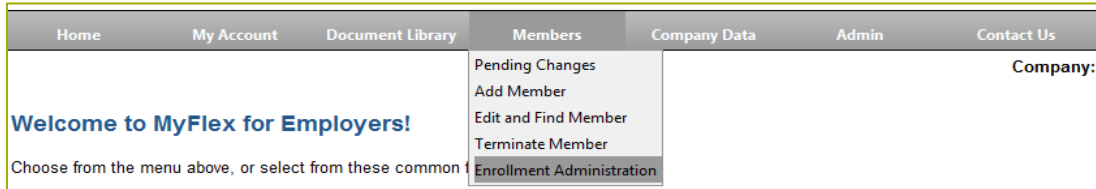
Additional Comments:

11. To add additional elections, repeat previous steps 5-9.

Note: The “web” Member ID number for new members is only temporary. After the elections are approved the member will be assigned a permanent PacificSource Administrators ID number, which they will receive in the mail.

Add Member Elections

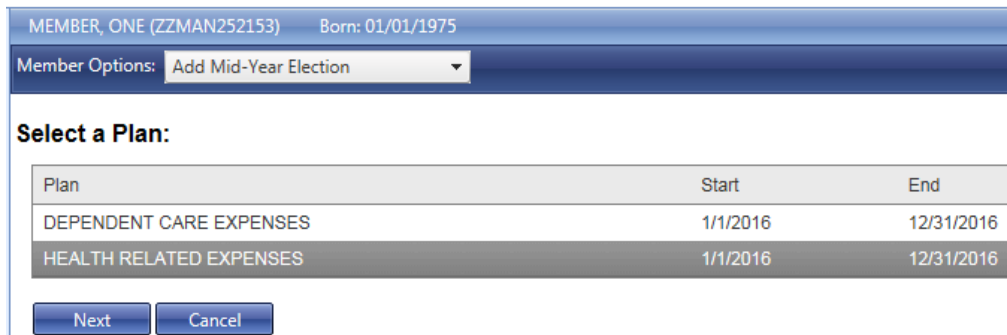
1. On the Home Page select **Members > Enrollment Administration**.



2. Select **Manage Enrollment**.



3. In the **Plan Stage** drop-down select **Current Year(s)**, on the top left.
4. Select the **Member** from the **Member List**, on the left.
5. From the **Member Options** drop-down menu, on the right, select **Add Mid-Year Election**.
6. Select the **Plan** and select **Next**.



7. Confirm / update the **Election Start Date** (plan effective date) and **Payroll Start Dates** (first pay date with deduction) and select **Next**.
8. Entering **employee** funded elections;
 - a. Confirm / update **Employee Payroll Calendar**.
 - b. Under **Employee (EE) Pre-Tax**, enter the **Annual or Per Pay** Amount (the alternate will auto-calculate based on entry).
 - c. Select **Next**.
9. Entering **employer** funded elections;
 - a. Confirm / update Employer Payroll Calendar.
 - b. Under **Employer (ER) Pre-Tax**, enter the **Annual or Per Pay** Amount (the alternate will auto-calculate based on entry).
 - c. Select **Next**.
10. Select a **Reason for Change**, enter **Additional Comments**, if applicable and select **Finish**.
11. To add additional elections, repeat previous steps 4-9.

Add New Dependent(s)

1. On the Home Page select **Members > Enrollment Administration**.
2. Select **Manage Enrollment**.
3. Select the **Member** from the **Member List**, on the left.
4. From the **Member Options** drop-down menu, on the right, select **Dependents**.
5. Select **Add New**.
6. Enter Dependent information.
7. Select **Save**.

Member Profile

1. On the Home Page select **Members > Enrollment Administration**.
2. Select **Manage Enrollment**.
3. Select the **Member** from the **Member List**, on the left.
4. From the **Member Options** drop-down menu, on the right, select **Member Profile**.
5. Update member demographic information.
6. Select **Save**.

Member Security

1. On the Home page select **Members > Edit and Find Member** from the drop-down menu.
2. Enter the **Last Name** (or at least the first two letters of the Last Name) and select **Search**.
 - Leave the "Search For" field blank to view all Members.
 - Select the "Include Terminated Members" box, for the search to include terminated members.
3. Select an option from the **Choose an action** drop-down menu and select **GO**.
 - **Reset Password**
 - **Reset and Email Notification**
 - **Reset Security Answers**
 - **Unlock Account**

Debit Card Options

- Debit cards for new members only may be ordered by the Group Administrator when creating a new member.
- Debit card changes; Create, cancel or order replacement cards, please contact our Membership Department at (541) 225-2761 or psamembership@pacificsource.com.
- Debit card is not available for Dependent Care Expenses or Parking / Transit only enrollees.

Terminating Members

1. On the Home Page select the **Terminate a member** link.
2. Enter the Last Name (or at least the first two letters of the Last Name) and select **Search**.
 - Leave the “Search For” field blank to view all Members.

Find Member(s)

To search by last name, enter at least the first two letters. To narrow your search, enter more letters. The field is not case-sensitive.

Search For:	<input type="text"/>
Search By:	Last Name <input type="text"/>
	<input type="checkbox"/> Include Terminated Members
	<input checked="" type="checkbox"/> Primary Member Only
<input type="button" value="Search"/>	

3. From the **Choose an action** drop-down menu select **Terminate** and select **GO**.
4. Enter the **Termination Date** and **Payroll End Date** (last paycheck with deduction) and select **Terminate**.
5. A message will appear: “Member successfully terminated.”

Terminate Member

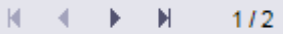
<input checked="" type="checkbox"/> Member successfully terminated.	
Member Name	ONE MEMBER
Member ID	ZZMAN252153
Termination Date (MM/DD/YYYY)	<input type="text" value="8/31/2016"/> <input type="button" value="Calendar"/>
Payroll End Date (MM/DD/YYYY)	<input type="text" value="8/31/2016"/> <input type="button" value="Calendar"/>
<input type="button" value="Terminate"/> <input type="button" value="Cancel"/>	

Note: If a terminated employee has returned and needs to be reactivated, please contact our Membership Department at (541) 225-2761 or psamembership@pacificsource.com.


Printing/Exporting Invoices

Note: Pop-ups will need to be enabled / allowed.


To view an invoice:

1. On the Home page select the **View/print an invoice** link.
2. Select the invoice number to preview (the Invoice Date is the date that the invoice was generated, generally 10 days prior to the pay date).
3. The invoice will open in a new window / tab. Change pages by selecting the arrows on the gray bar on the top left of the page. 

To print an invoice:

1. You must have Acrobat / Adobe Reader to print the invoice.
2. Select the **Print** icon  on the top left of the page
3. Enter the page range or leave the default "All" and select **OK**.
4. An Adobe Reader window will open. You can print by selecting the **Print** button or save the PDF document by selecting the **Save** button.


To export an invoice to another program:

1. Select the **Export** icon  on the top left of the page.
2. A new window will open. Select the format or program from the drop-down.
3. Enter the page range or leave the default "All" and select OK.
 - Acrobat (PDF): The invoice will open in a new window. Select the Save icon and save accordingly.
 - MS Excel and MS Word: A message box will open asking if you want to Open or Save the invoice. Select Save and save accordingly.


Running Reports

Note: Pop-ups will need to be enabled / allowed.


To view reports:

1. On the Home page select the **Run reports** link.
2. Select the desired report from the Select a Report drop-down menu.
3. Additional criteria options will appear, which will vary depending on the report selected. *Enter the criteria for the report.
***Plan Year (YYYY)** – Enter the plan year (Equal to 2016) to display a report for a specific plan year, otherwise the report will run for all plan years.
4. Leave the two boxes unselected (“Show Criteria in Report Header” and “Mask Member ID”).
5. Select **View Report**. The report will appear in a new window / tab. Change pages by selecting the arrows on the gray bar at the top of the page. 

To print the report:

1. You must have Acrobat / Adobe Reader to print the report.
2. Select the **Print icon**  on the top left of the screen. A new window will appear.
3. Enter the page range or leave the default “All” and select **OK**.
4. An Adobe Reader window will open. You can print by selecting the **Print** button or save the PDF document by selecting the **Save** button.

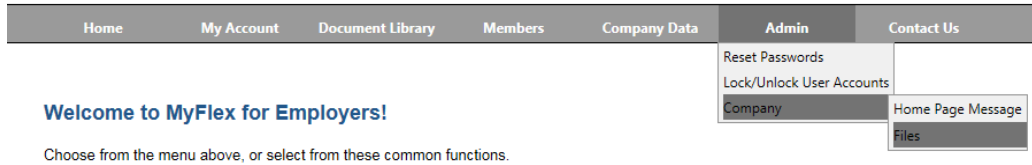
To export the report to another program:

1. Select the **Export icon**  on the top left of the page.
2. A new window will open. Select the format or program from the drop-down.
3. Enter the page range or leave the default “All” and select **OK**.
 - Acrobat (PDF): The invoice will open in a new window. Select the Save icon and save accordingly.
 - MS Excel and MS Word: A message box will open asking if you want to Open or Save the invoice. Select Save and save accordingly.

Uploading Documents or Files

Using the MyFlex Files feature, you can securely upload enrollment and change forms, payment backup, renewal information, and other related documents.

1. From the Home page select **Admin > Company > Files** from the drop-down menu.



2. Complete the **Title** field with your company name as listed in the upper right of the screen.
3. In the **Description** field indicate the file contents, such as “New Enrollment”, “Renewal Info”, etc.
4. Use the **Browse** button to locate the document/file you wish to attach. You may upload Excel, PDF, Word, or JPG files.

***Note:** File name may not include special characters (#, %, &, *, <>, ?, etc.)

A New File

Title	<input type="text"/>
Description	<input type="text"/>
File	<input type="text"/> Browse...

5. Click **Save** to transmit a notification of the upload. The file will be transferred into our system once processing begins. At that point, you will no longer see it listed in the **Existing Files** box.

Existing Files		
Title	File	Description
No records to display.		