Admin★America
FSA HRA COBRA ERISA HSA ACA Compliance & Administration

Employer Portal Walkthrough

This Training Reviews the Employer Portal In-Depth

Further Questions? Email employersupport@adminamerica.com or Call 770-992-5959

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2018

Table of Contents

How Do I Log In 4

Portal Symbols Key 5

Home Tab Overview 6

Reports Tab Overview . . . . . 7 – 8

List of Reports 9

Report Parameters . . . . . 10 – 23

Request Tab Overview 24

Employee Tab Overview 25

View All Employees 26

Add Employee . . . . . 27 – 31

Search for Employee 32

Employee Profile 33

Update Employee Profile 34

Employee Dependents 35

Add Dependent 36

Employee Account Summary . . . . . 37 – 42

Employee Enrollments . . . . . 43 – 44

Update Employee Enrollment . . . . . 45 – 51

Employee Contributions 52

Table of Contents

Employee Tab

Employee Claims 53

Employee Payments 54

Employee Employment Status 55

Terminate Employee 55

Re-Activate Employee 56

Remove Employee Status 56

Plans Tab Overview 57

Resource Tab Overview 58

Import Tab Overview 59

HSA Import Process . . . . . 60 – 61

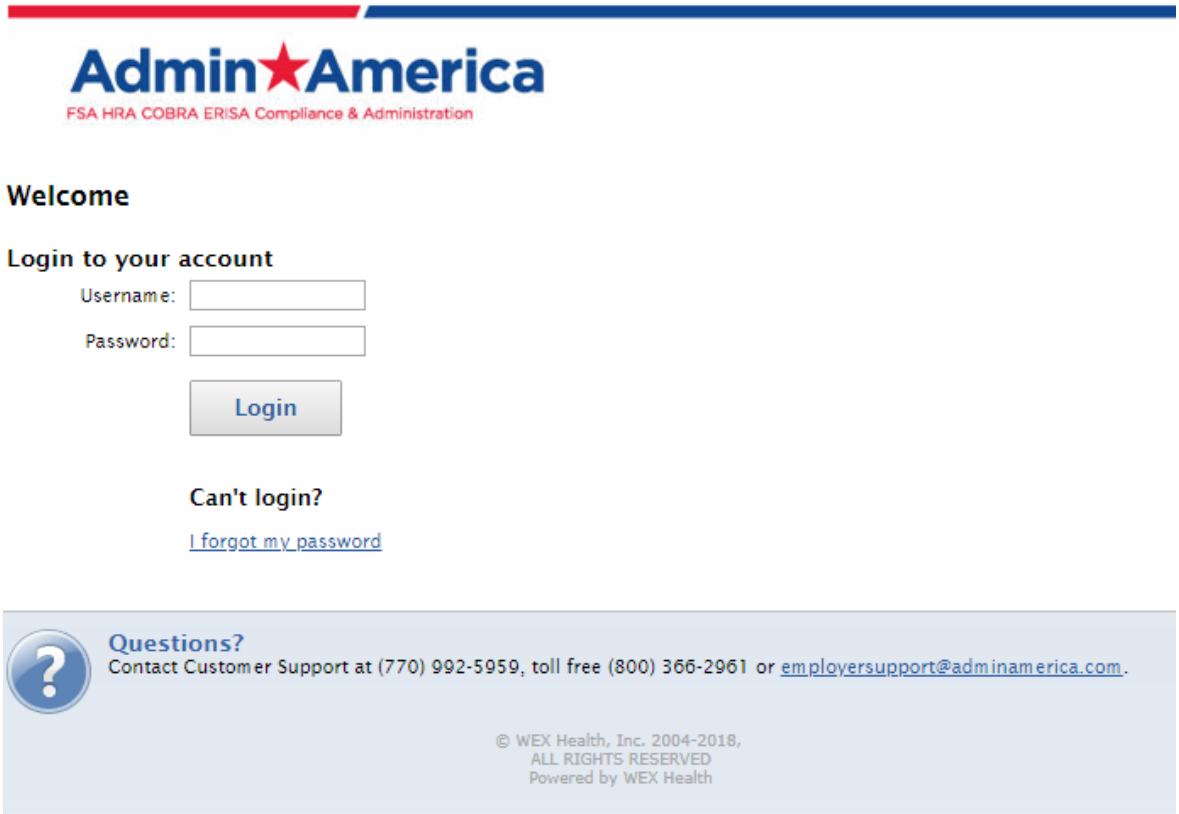
Further Questions? Email employersupport@adminamerica.com or Call 770-992-5959

How Do I Log In?

After your plan(s) have been finalized in the system, any authorized users will receive an email with this guide attached. The employer portal link is available in the email and is also below. Your username and password is in the email only.

Employer Portal Link: https://adminamericaemployer.lh1ondemand.com/Login

Based on your permissions you may or may not have access to all of the features available in this guide.



To determine your Employer Portal Access Level, please email EmployerSupport@adminamerica.com or call 770-992-5959

Portal Symbols Key

Hover over the Information bubbles to receive additional details and explanations.

Expand or Retract Information

HOME

View your **Recently Created Reports** *(for FSA, HRA, and HSA)* and **Import Queue** *(for HSA)*.

Recently Created Reports consists of any automatic system generated reports in addition to any reports you have requested.

Import Queue consists of any census files we have recently imported for you or HSA contribution files recently imported.

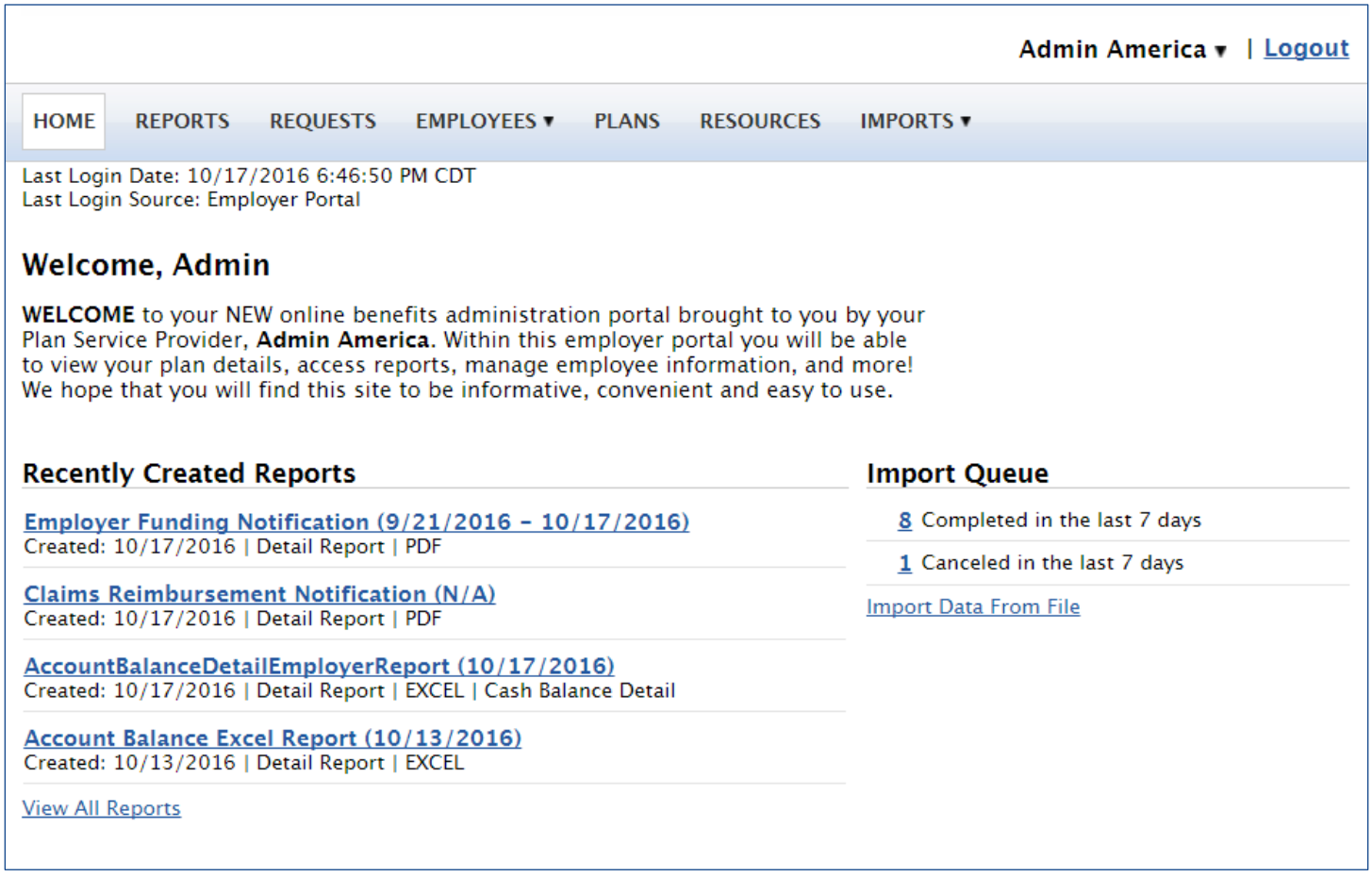


Table of Contents

Report Descriptions are located under each **Report Name**.

The description lists very basic information about the report to help you determine which report(s) you want to run.

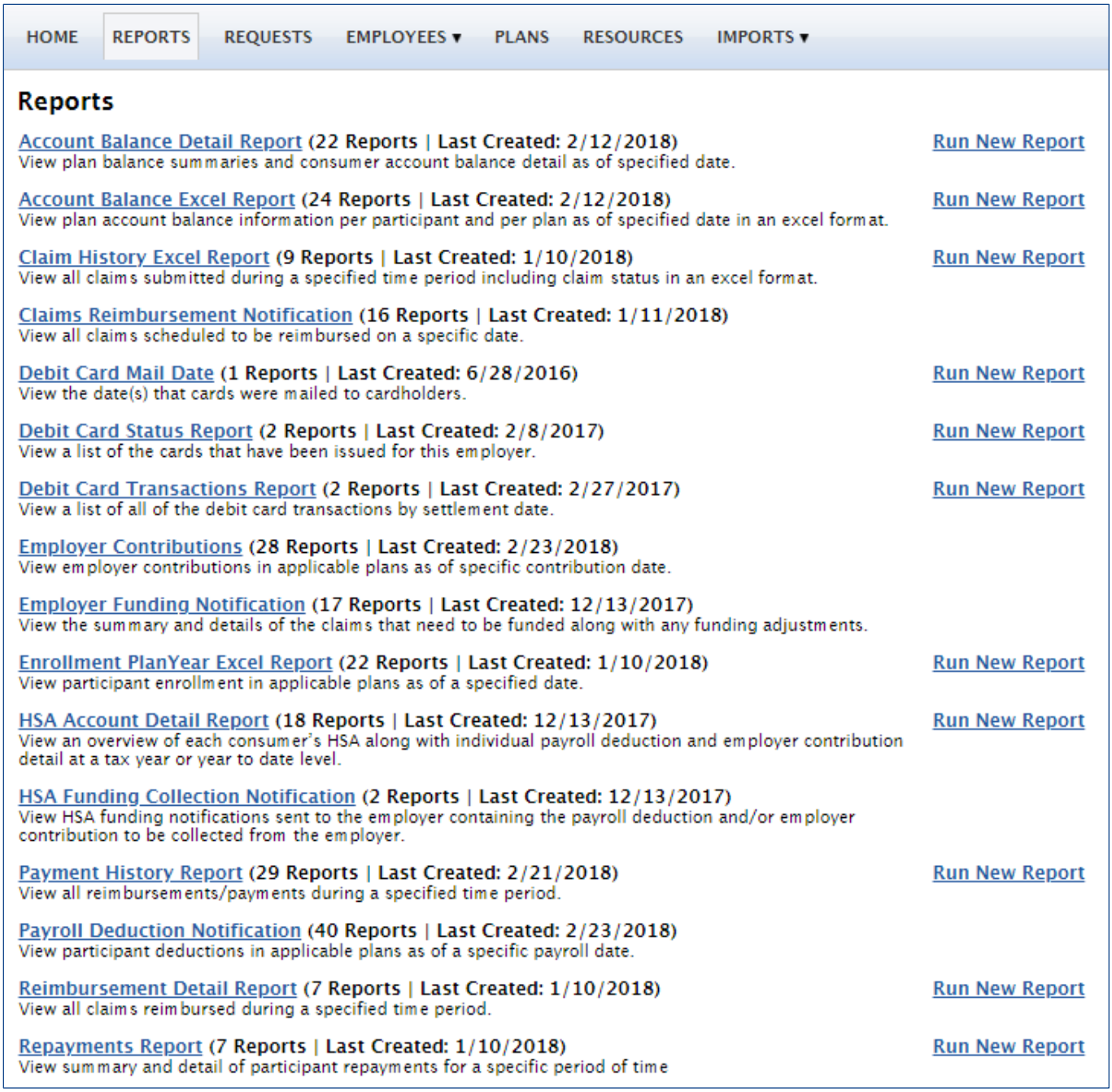
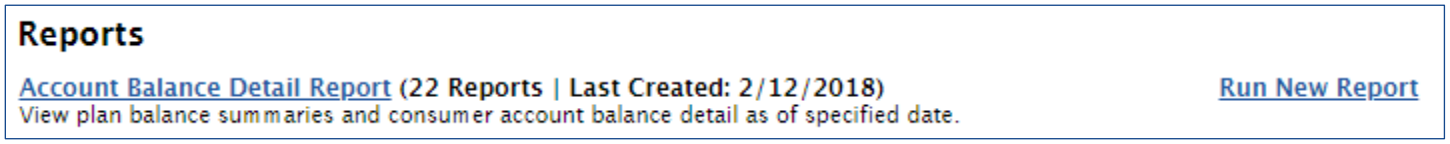


Table of Contents

View Created Reports or **System Generated Reports**

Click the Report Name



All reports previously created or generated for the Report Name will be displayed. The most recent report will be available first.

Click the Report Name to view the report

Table of Contents

Run New Report

Click Run New Report by the Report Name

Reports that do not have a Run New Report link are system generated and cannot be run manually

Specify the report parameters
Check the box to have the system email you once complete (optional)
Click Request

For assistance with report parameters by report, click the Report Name below:

Report Name	Report Description	Plan Type(s)
Account Balance Detail Report	View plan balance summaries and consumer account balance detail as of specified date.	FSA & HRA
Account Balance Excel Report	View plan account balance information per participant and per plan as of specified date in an excel format.	FSA & HRA
Claim History Excel Report	View all claims submitted during a specified time period including claim status in an excel format.	FSA & HRA
Debit Card Mail Date	View the date(s) that cards were mailed to cardholders.	FSA & HRA*
Debit Card Status Report	View a list of the cards that have been issued for this employer.	FSA & HRA*
Debit Card Transactions Report	View a list of all of the debit card transactions by settlement date.	FSA & HRA*
Enrollment PlanYear Excel Report	View participant enrollment in applicable plans as of a specified date.	FSA & HRA
HSA Account Detail Report	View an overview of each consumer's HSA along with individual payroll deduction and employer contribution detail at a tax year or year to date level.	HSA
Payment History Report	View all reimbursements/payments during a specified time period.	FSA & HRA
Reimbursement Detail Report	View all claims reimbursed during a specified time period.	FSA & HRA
Repayments Report	View summary and detail of participant repayments for a specific period of time.	FSA & HRA

** Only 213 HRA Plans qualify for cards*

Table of Contents

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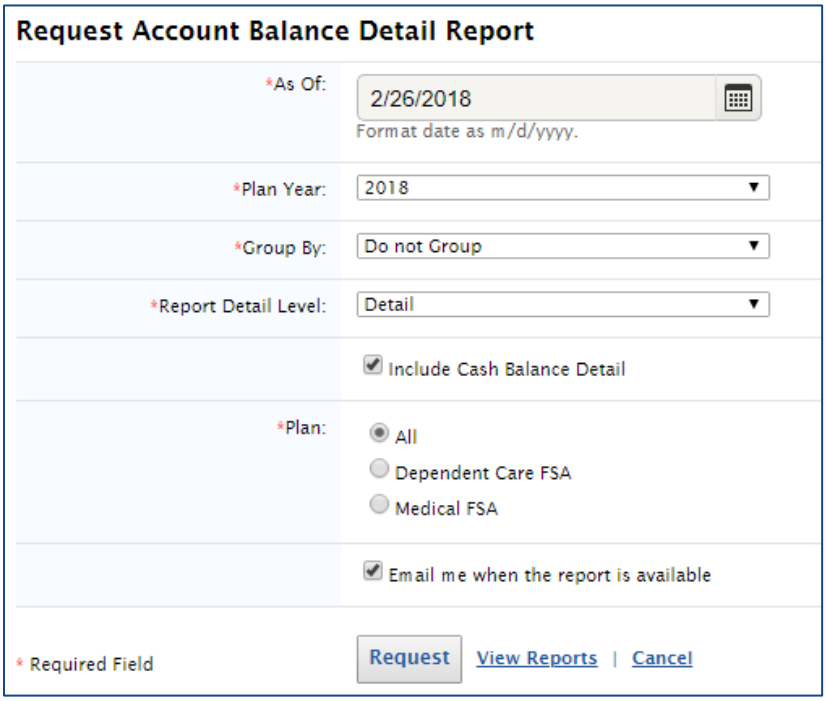
To Create an **Account Balance Detail Report,** click **Run New Report**

Great for Bank Account Reconciliation

Account Balance Detail Report (22 Reports | Last Created: 2/12/2018) Run New Report
View plan balance summaries and consumer account balance detail as of specified date.

Complete the following to request the report:



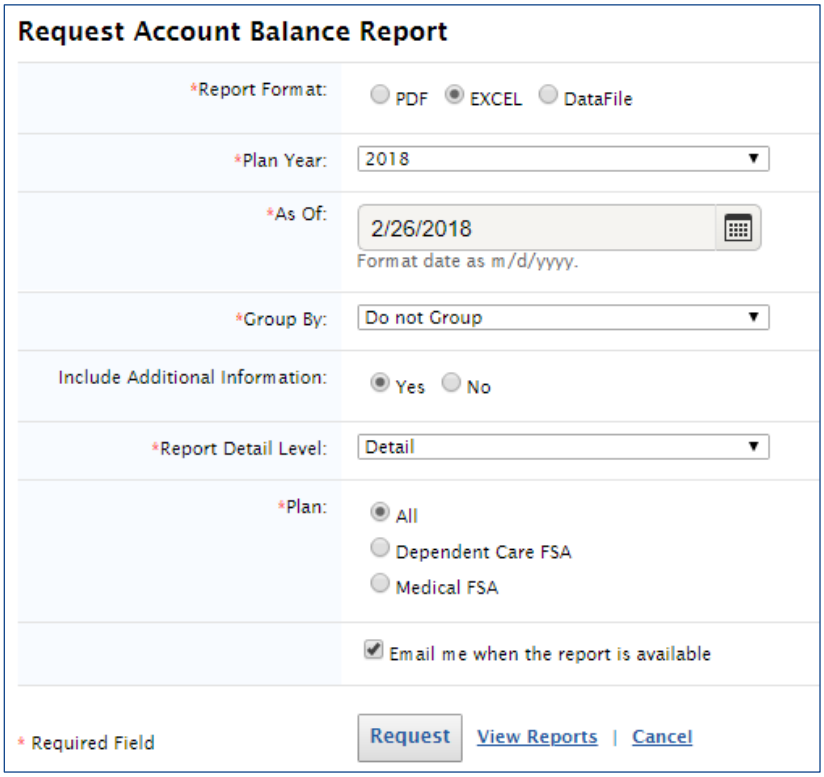
- **Select the Date you would like the report As Of**
  (the date must be as of the start of the Plan Year you specify or later)
- **Select the Plan Year**
  (if you have multiple lines of service, the plan years may be separate)
- **Select Do not Group in the Group By section**
  (you may run the report to differentiate between groups if you have multiple divisions setup with Admin America)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Check the box to Include the Cash Balance Detail**
  (click the link above for further details on this calculation)
- **Select the Line of Service you would like the report run for, or select the All option to run the report for all lines within that year**
  (Lines of service may include the Medical FSA, Dependent Care FSA, Limited Purpose FSA, Transportation, or Parking and are based on your setup within the system)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

To Create an **Account Balance Excel Report,** click **Run New Report**

Account Balance Excel Report (24 Reports | Last Created: 2/12/2018) Run New Report
View plan account balance information per participant and per plan as of specified date in an excel format.

Complete the following to request the report:



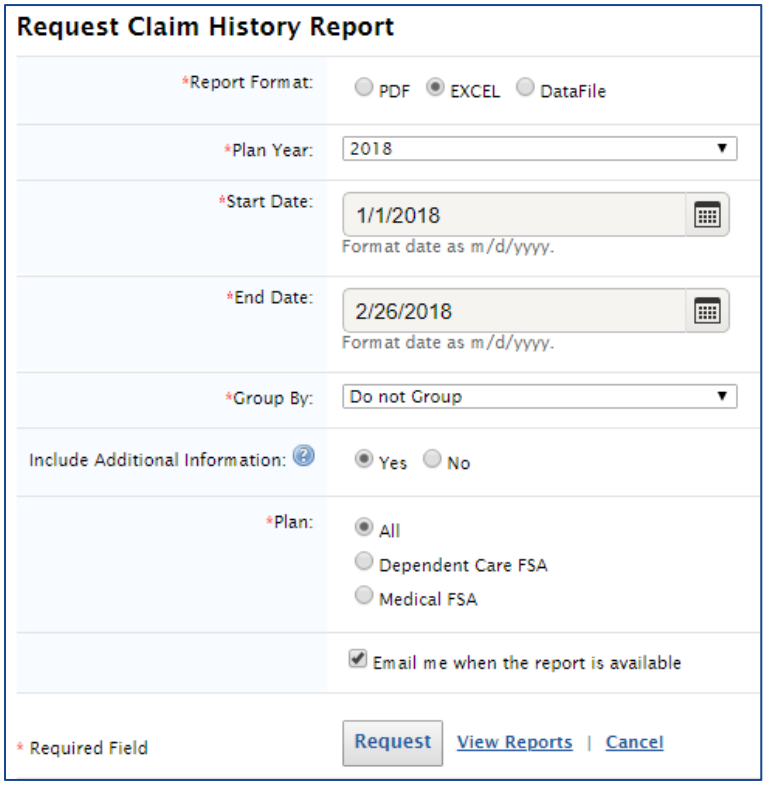
- **Select the Report Format** *(PDF, Excel, or DataFile)*
- **Select the Plan Year**
  (if you have multiple lines of service, the plan years may be separate)
- **Select the Date you would like the report As Of**
  (the date must be as of the start of the Plan Year you specify or later)
- **Select Do not Group in the Group By section**
  (you may run the report to differentiate between groups if you have multiple divisions setup with Admin America)
- **Select Yes to Include Additional Information**
  (selecting Yes will provide Active and Terminated employment status indicators)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Select the Line of Service you would like the report run for, or select the All option to run the report for all lines within that year**
  (Lines of service may include the Medical FSA, Dependent Care FSA, Limited Purpose FSA, Transportation, or Parking and are based on your setup within the system)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

To Create a **Claim History Excel Report,** click **Run New Report**

Claim History Excel Report (9 Reports | Last Created: 1/10/2018) Run New Report
View all claims submitted during a specified time period including claim status in an excel format.

Complete the following to request the report:



- **Select the Report Format** *(PDF, Excel, or DataFile)*
- **Select the Plan Year**
  (if you have multiple lines of service, the plan years may be separate)
- **Select the Start Date**
  (the first claim submission date you would like available on the report)
- **Select the End Date**
  (the last claim submission date you would like available on the report)
- **Select Do not Group in the Group By section**
  (you may run the report to differentiate between groups if you have multiple divisions setup with Admin America)
- **Select Yes to Include Additional Information**
  (selecting Yes will provide Active and Terminated employment status indicators)
- **Select the Line of Service you would like the report run for, or select the All option to run the report for all lines within that year**
  (Lines of service may include the Medical FSA, Dependent Care FSA, Limited Purpose FSA, Transportation, or Parking and are based on your setup within the system)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

The **Claims Reimbursement Notification** is automatically created by the system on your processing date or anytime there is a special processing

Claims Reimbursement Notification (16 Reports | Last Created: 1/11/2018)
View all claims scheduled to be reimbursed on a specific date.

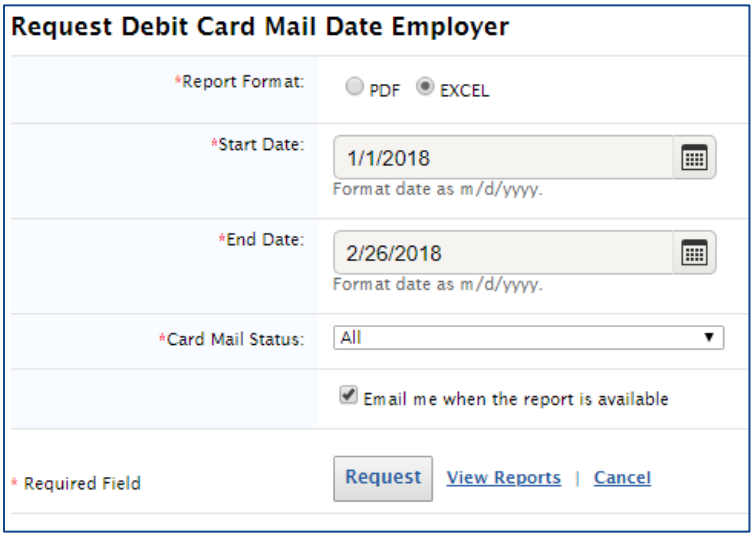
This report cannot be run, but you may view all reports created by clicking on the report name.

This report reflects any non-benefit card reimbursements due to FSA and/or HRA participants as of the employer processing date. The employer processing date is determined during initial setup of the FSA and/or HRA plan(s). How reimbursements are issued to participants is determined during initial setup as well.

To Create a **Debit Card Mail Date Report,** click **Run New Report**

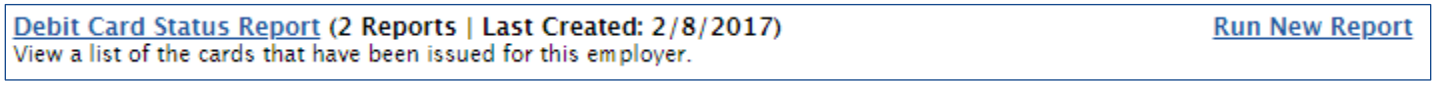
Debit Card Mail Date (1 Reports | Last Created: 6/28/2016) Run New Report
View the date(s) that cards were mailed to cardholders.

Complete the following to request the report:

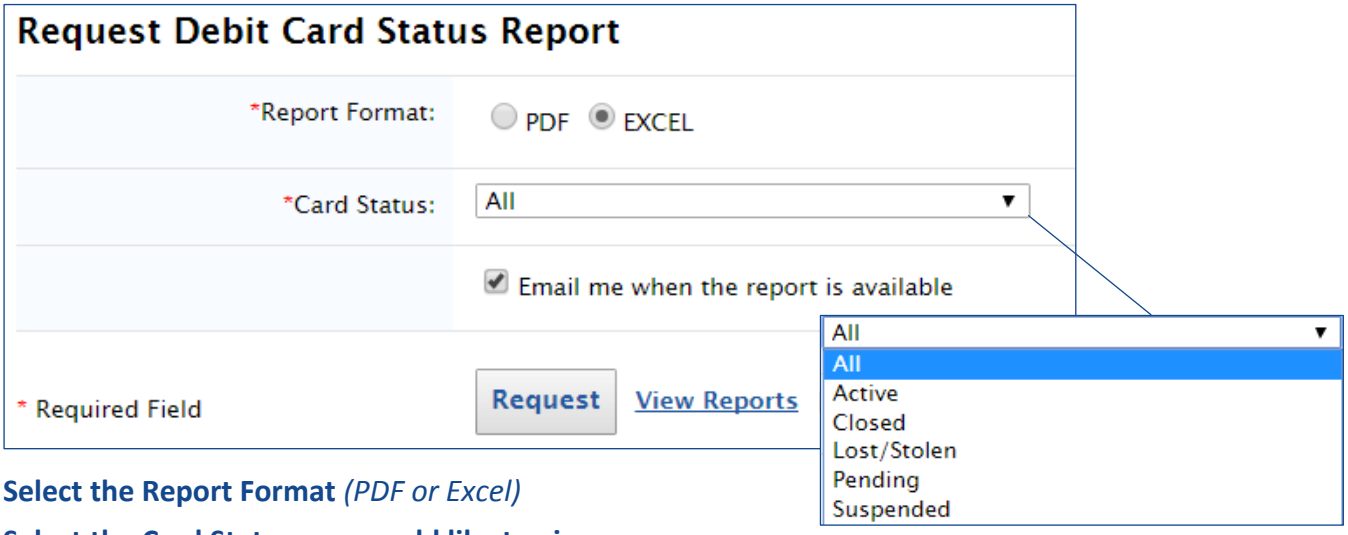


- **Select the Report Format** *(PDF or Excel)*
- **Select the Start Date**
  (the first card mail date you would like available on the report)
- **Select the End Date**
  (the last card mail date you would like available on the report)
- **Select the Card Mail Status** *(All, Mailed, or Not Mailed)*
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents



Complete the following to request the report:



- **Select the Report Format** *(PDF or Excel)*
- **Select the Card Status you would like to view**

  Suspended cards are usually due to overdue requested receipt(s) on the employee's account. When this happens a hold will be placed on the employee's account and a repayment will be requested.

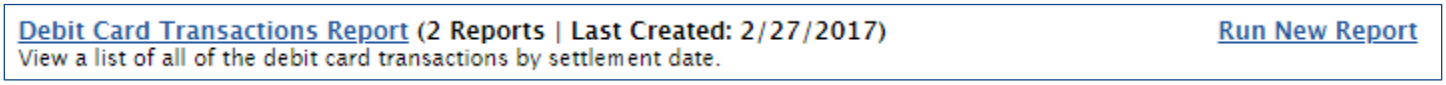
  Employees have 60 days to supply itemized receipts for unsubstantiated debit card transactions that do not match the auto-substantiate amounts listed in the system.

  Auto-substantiated debit card transactions do not require receipts and may include expenses matching the copayment amounts you submit to us via your SBC. Please ensure you submit all current SBC's to Admin America to get the most out of our auto-substantiation technology.

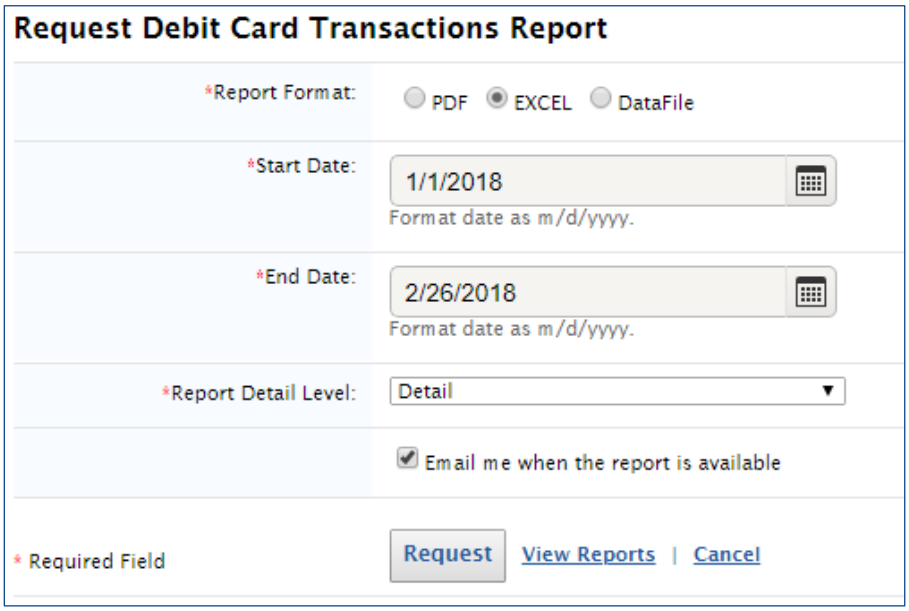
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

To Create a **Debit Card Transaction Report,** click **Run New Report**

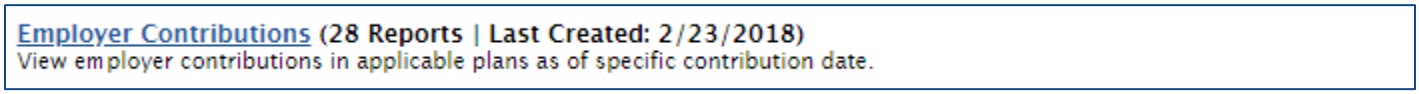


Complete the following to request the report:



- **Select the Report Format** *(PDF, Excel, or DataFile)*
- **Select the Start Date**
  (the first card transaction date you want available on the report)
- **Select the End Date**
  (the last card transaction date you want available on the report)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

The **Employer Contributions Report** is automatically created by the system each paycheck date



This report cannot be run, but you may view all reports created by clicking on the report name.

This report reflects employer contributions to an FSA and/or HRA plan as of the paycheck date. The date of creation is the same as the paycheck date based on the Admin America system.

Paycheck dates are provided to Admin America during implementation of a new plan and renewal of an existing plan. Please send any changes to Enroll@adminamerica.com.

Employer contribution inconsistencies between this report and employer system records for any prefunded plan (i.e. Medical FSA) will not limit the funds available to the participant. This assumes that the plan year total contribution amount in the Admin America system is consistent with the plan year total contribution amount in the employer system.

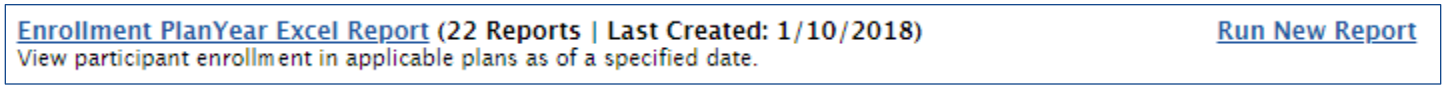
Employer contribution inconsistencies between this report and employer system records for any non-prefunded plan (i.e. Dependent Care FSA) will limit the funds available to the participant. Please contract EmployerSupport@adminamerica.com to rectify.

The **Employer Funding Notification** is automatically created by the system on your processing date or anytime there is a special processing

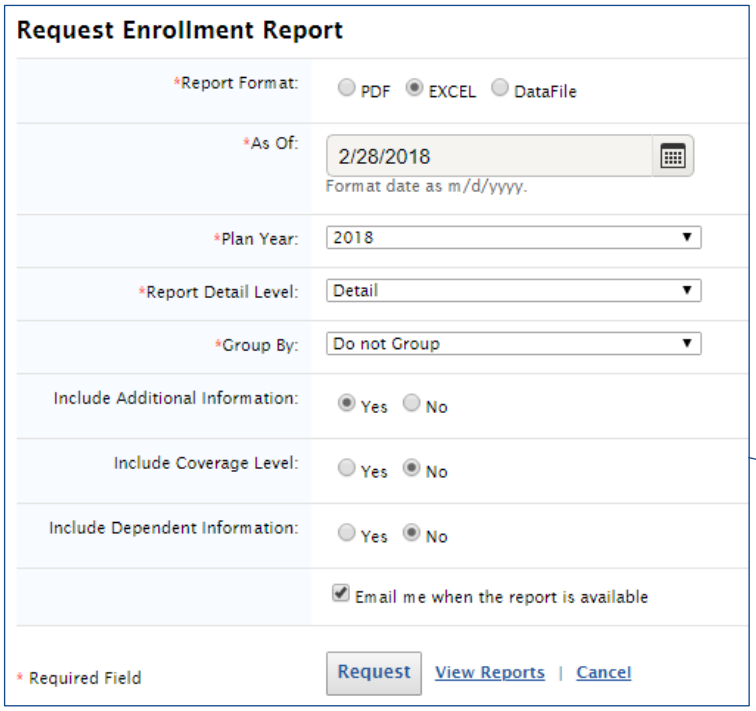
This report cannot be run, but you may view all reports created by clicking on the report name.

This report reflects any non-benefit card reimbursements due to FSA and/or HRA participants as of the employer processing date. The employer processing date is determined during initial setup of the FSA and/or HRA plan(s). How reimbursements are issued to participants is determined during initial setup as well.

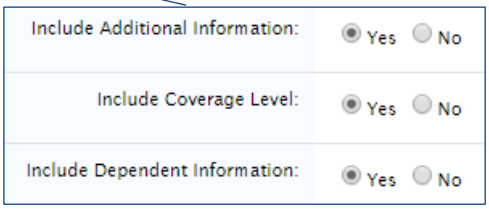
Back to Report List | Table of Contents



Complete the following to request the report:

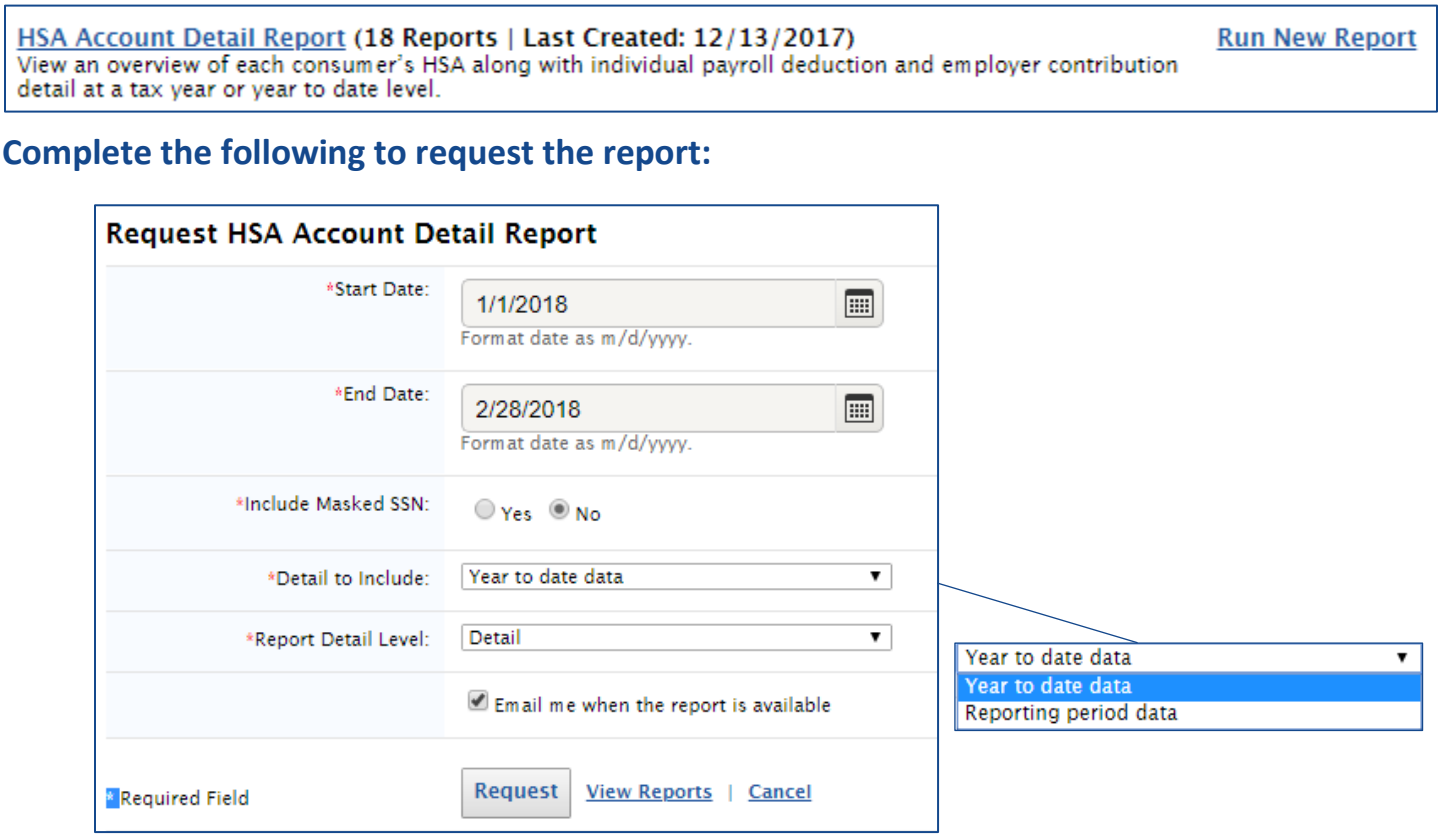


Select 'Yes' to all options for an HRA plan



- **Select the Report Format** *(PDF, Excel, or DataFile)*
- **Select the As Of Date**
  (the date must be as of the start of the Plan Year you specify or later)
- **Select the Plan Year**
  (if you have multiple lines of service, the plan years may be separate)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Select Do not Group in the Group By section**
  (you may run the report to differentiate between groups if you have multiple divisions setup with Admin America)
- **Select Yes to Include Additional Information**
  (selecting Yes will provide Active and Terminated employment status indicators)
- **Select if the Coverage Level should be included**
  (this is for HRA use; coverage Level is not used for FSA purposes)
- **Select if Dependent Information should be included**
  (this is for HRA use; dependent Information is not required for FSA purposes)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents



Complete the following to request the report:

- **Select the Start Date**
  (enter the first HSA contribution date you want to display on the report)
- **Select the End Date**
  (enter the last HSA contribution date you want to display on the report)
- **Select No for Include Masked SSN**
  (if you select Yes, SSN will not be included)
- **Select the Detail to Include**
  (if you select 'Year to date data' it will include contributions based on the tax year; if you select 'Reporting period data' it will include contributions based on the Start and End Date only)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

The **HSA Funding Collection Notification** is automatically created by the system every day

HSA Funding Collection Notification **(2 Reports | Last Created: 12/13/2017)**
View HSA funding notifications sent to the employer containing the payroll deduction and/or employer contribution to be collected from the employer.

This report cannot be run, but you may view all reports created by clicking on the report name.

This report will generate as a PDF, Excel file, or both dependent upon Employer setup in the Admin America system. If you do not have access to both formats, and you would like access, please email EmployerSupport@adminamerica.com.

This report reflects any HSA funding that will be collected from the employer bank account within 1 – 3 business days of creation. Funding will not be collected for any entries that are on hold.

A hold occurs when:

1. The participant has not accepted the HSA terms and conditions
2. The participant fails an identity verification item
3. Both of the above

A hold for failure to accept the terms and conditions may be resolved through acceptance of the terms and conditions. For further details, please see the Activation Guide.

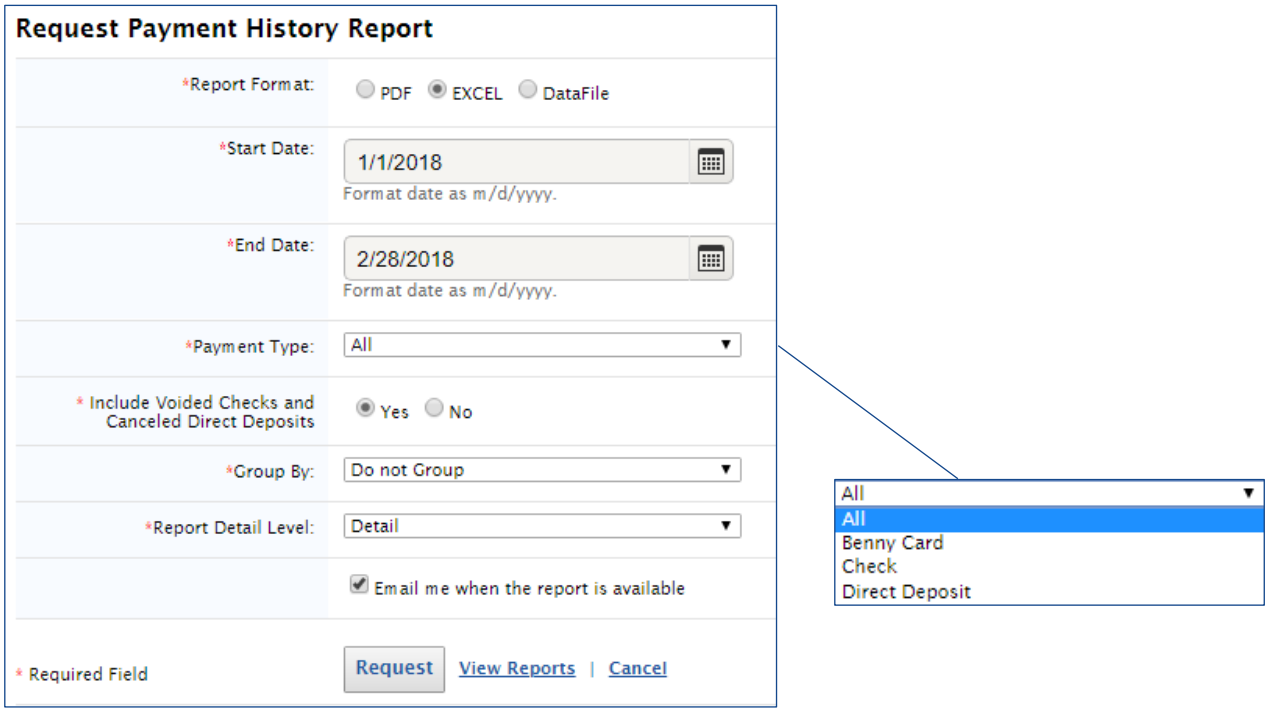
A hold for failure to pass an identity verification item may be resolved through suppling the appropriate documentation to offset the failure. For further details, please email HSA@adminamerica.com.

Back to Report List | Table of Contents

Great for Bank Account Reconciliation

Payment History Report (29 Reports | Last Created: 2/21/2018) Run New Report
View all reimbursements/payments during a specified time period.

Complete the following to request the report:



- **Select the Report Format** *(PDF, Excel, or DataFile)*
- **Select the Start Date**
  (the first claim payment date you would like available on the report)
- **Select the End Date**
  (the last claim payment date you would like available on the report)
- **Select the Payment Type**
  (select 'All' to view benefit card and non-benefit card payments)
- **Select to Include Voided Checks and Canceled Direct Deposits**
  (voided checks and canceled direct deposits are displayed separate from other payment types)
- **Select Do not Group in the Group By section**
  (you may run the report to differentiate between groups if you have multiple divisions setup with Admin America)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

The **Payroll Deductions Notification** is automatically created by the system each paycheck date

Payroll Deduction Notification **(40 Reports | Last Created: 2/23/2018)**
View participant deductions in applicable plans as of a specific payroll date.

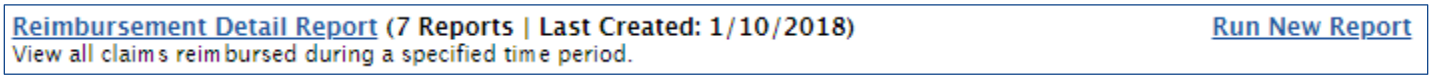
This report cannot be run, but you may view all reports created by clicking on the report name.

This report reflects employee payroll deductions contributed to an FSA plan as of the paycheck date. The date of creation is the same as the paycheck date based on the Admin America system.

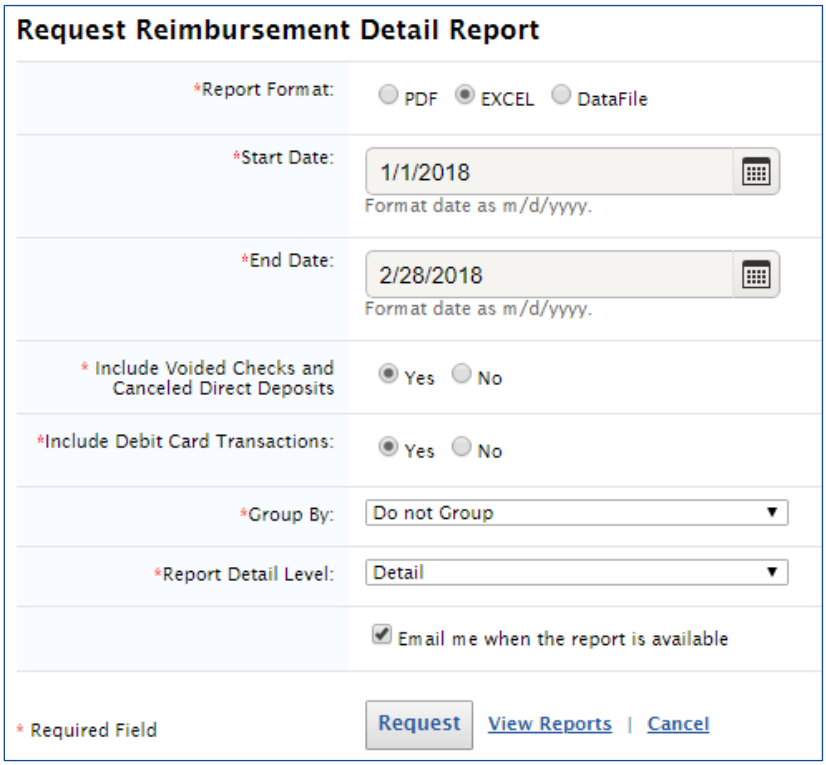
Paycheck dates are provided to Admin America during implementation of a new plan and renewal of an existing plan. Please send any changes to Enroll@adminamerica.com.

Payroll deduction inconsistencies between this report and employer system records for any prefunded plan (i.e. Medical FSA) will not limit the funds available to the participant. This assumes that the plan year total contribution amount in the Admin America system is consistent with the plan year total contribution amount in the employer system.

Payroll deduction inconsistencies between this report and employer system records for any non-prefunded plan (i.e. Dependent Care FSA) will limit the funds available to the participant. Please contract EmployerSupport@adminamerica.com to rectify.



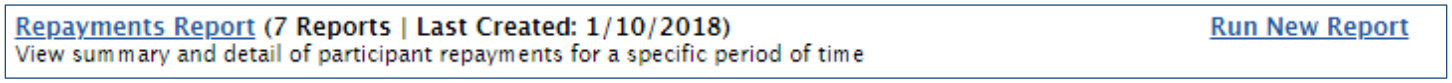
Complete the following to request the report:



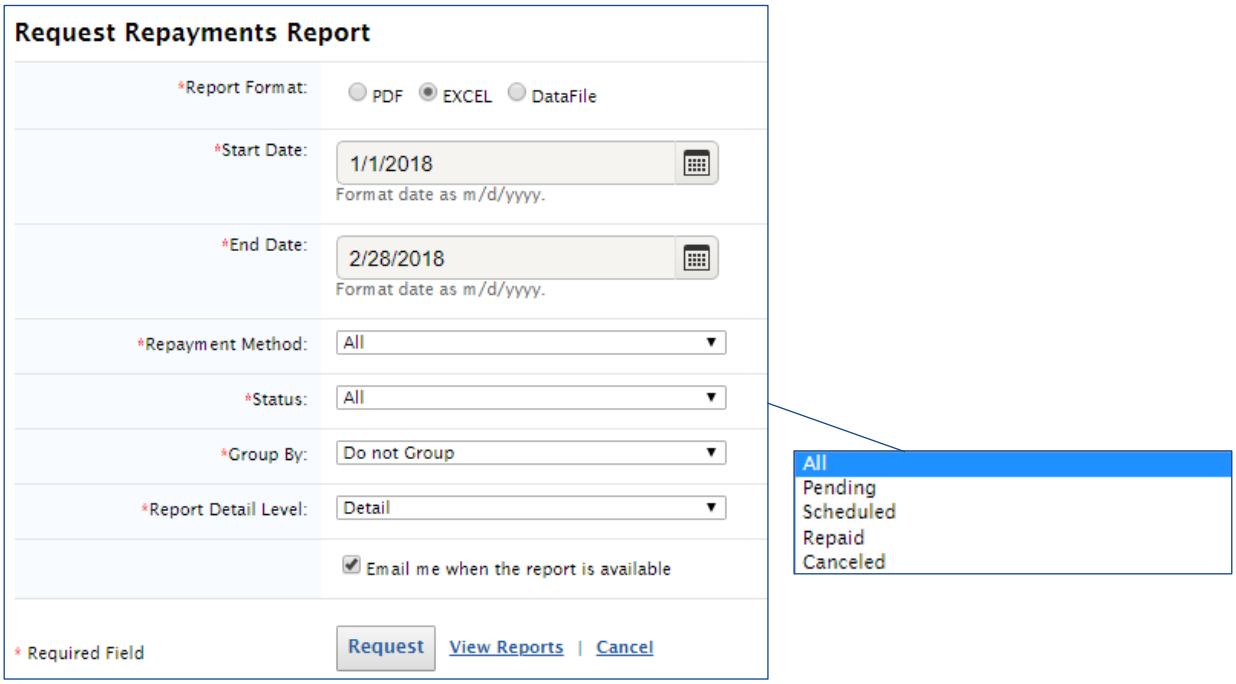
- **Select the Report Format** *(PDF, Excel, or DataFile)*
- **Select the Start Date**
  (the first claim payment date you would like available on the report)
- **Select the End Date**
  (the last claim payment date you would like available on the report)
- **Select to Include Voided Checks and Canceled Direct Deposits**
  (voided checks and canceled direct deposits are displayed separate from other payment types)
- **Select to Include Debit Card Transactions**
  (select 'Yes' to view benefit card and non-benefit card payments)
- **Select Do not Group in the Group By section**
  (you may run the report to differentiate between groups if you have multiple divisions setup with Admin America)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

To Create a **Repayments Report,** click **Run New Report**



Complete the following to request the report:



- **Select the Report Format** *(PDF, Excel, or DataFile)*
- **Select the Start Date**
  (enter the first date you want FSA and/or HRA Employee Repayment Requests to display on the report)
- **Select the End Date**
  (enter the last date you want FSA and/or HRA Employee Repayment Requests to display on the report)
- **Select 'All' for the Repayment Method**
  (Note: Admin America does not currently have the ability to accept repayments via payroll)
- **Select the Status**
  (select 'All' for a list of all repayment statuses, select 'Pending' to display a list of repayments that are currently due, select 'Scheduled' for a list of repayments that were repaid online and will be processed soon, select 'Repaid' for a list of repayments that were previously repaid, select 'Canceled' for a list of repayments that have been canceled)
- **Select Do not Group in the Group By section**
  (you may run the report to differentiate between groups if you have multiple divisions setup with Admin America)
- **Select Detail in the Report Detail Level section**
  (if you do not want identifying information, select De-Identified Detail)
- **Check the box to have the system email you once the Report is Available**
- **Click Request**

Back to Report List | Table of Contents

REQUESTS

Send a **Request** through the **Employer Portal** or by **Email**

We recommend Email Requests for faster processing

Email Requests

Email Requests by Line(s) of Service with Admin America Inc	
Line(s) of Service	**Email Address**
FSA Only	FSA@adminamerica.com
HRA Only	HRA@adminamerica.com
FSA & HRA	HRA@adminamerica.com
Any (FSA, HRA, HSA) & COBRA	Changes@adminamerica.com

All HSA Changes	HSA@adminamerica.com

Employer Portal Requests

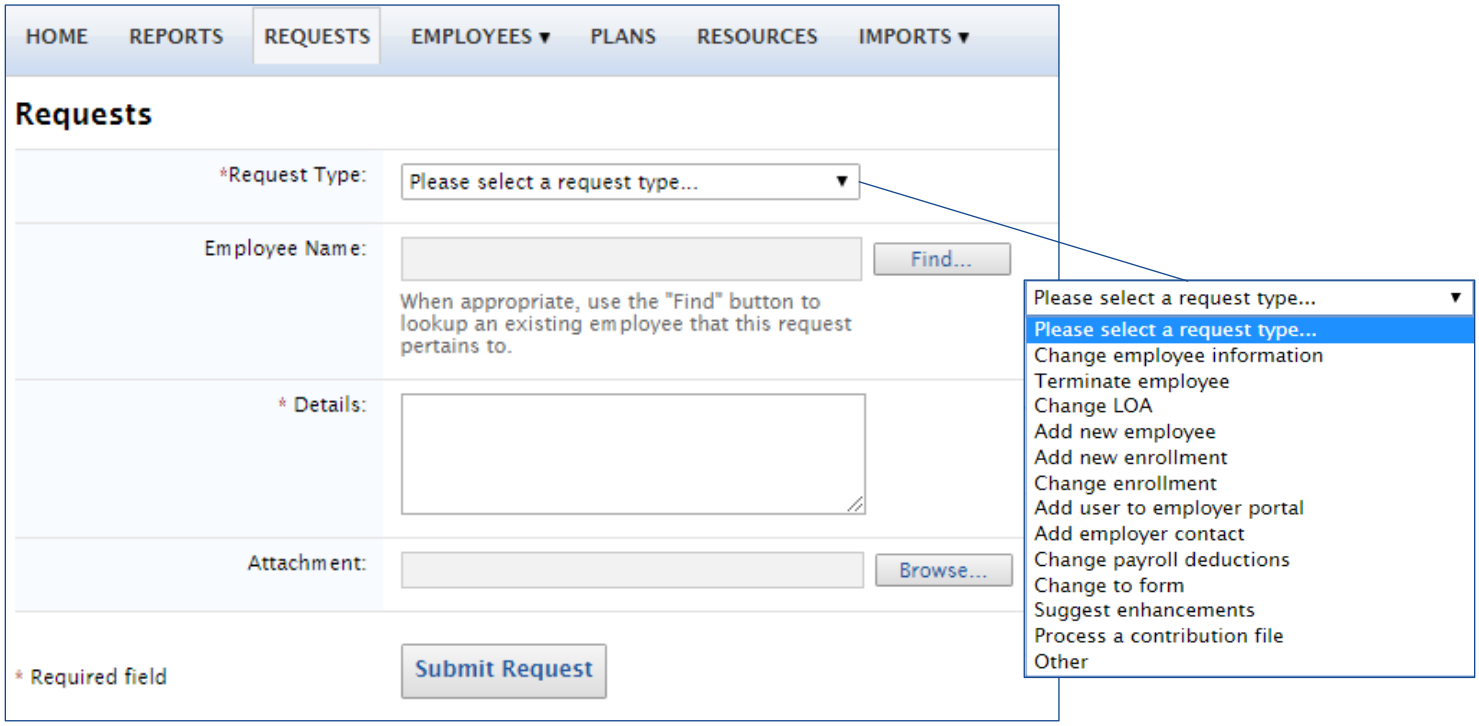


Table of Contents

View All Employees, Add Employee to the Admin America system, Search Employees by Employment Status, or View Recently Viewed Employees

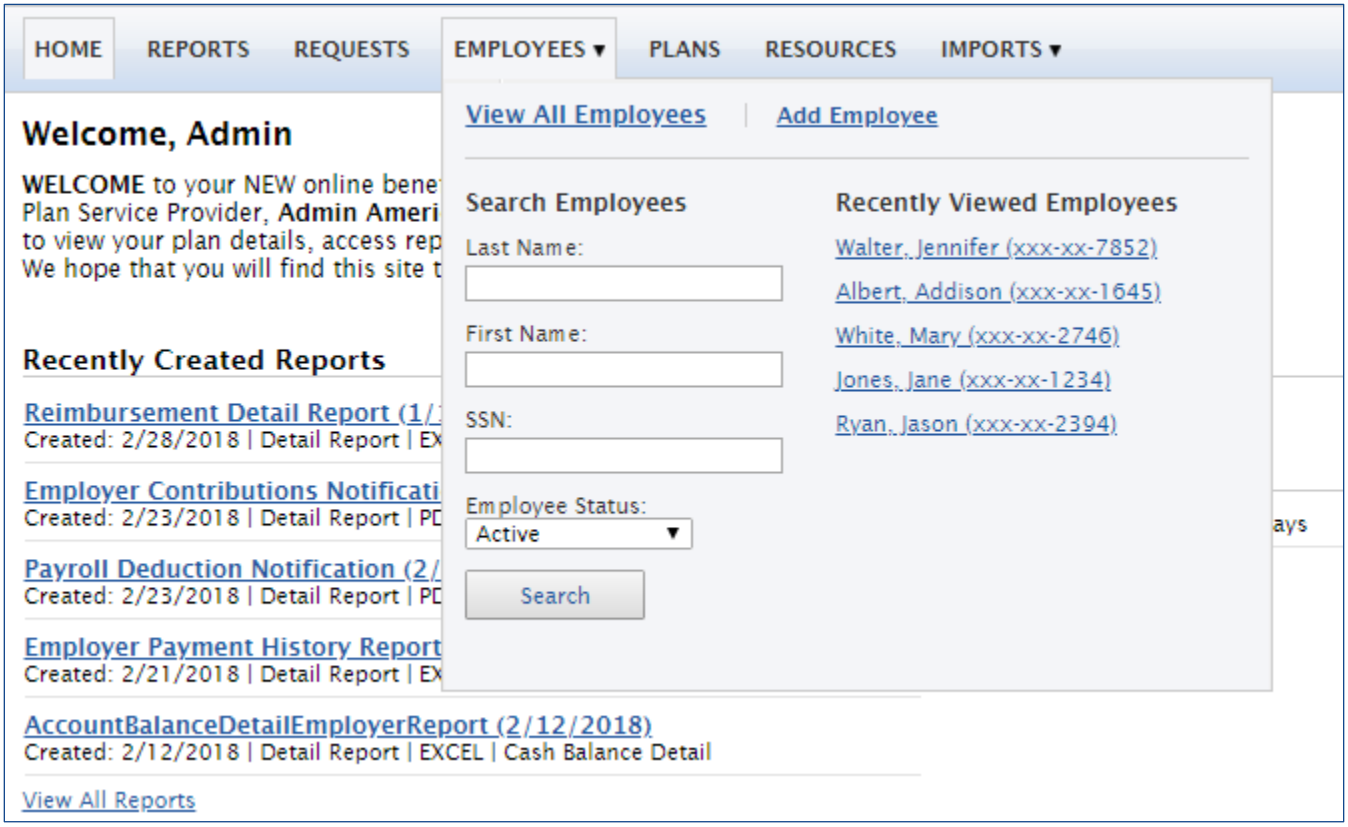
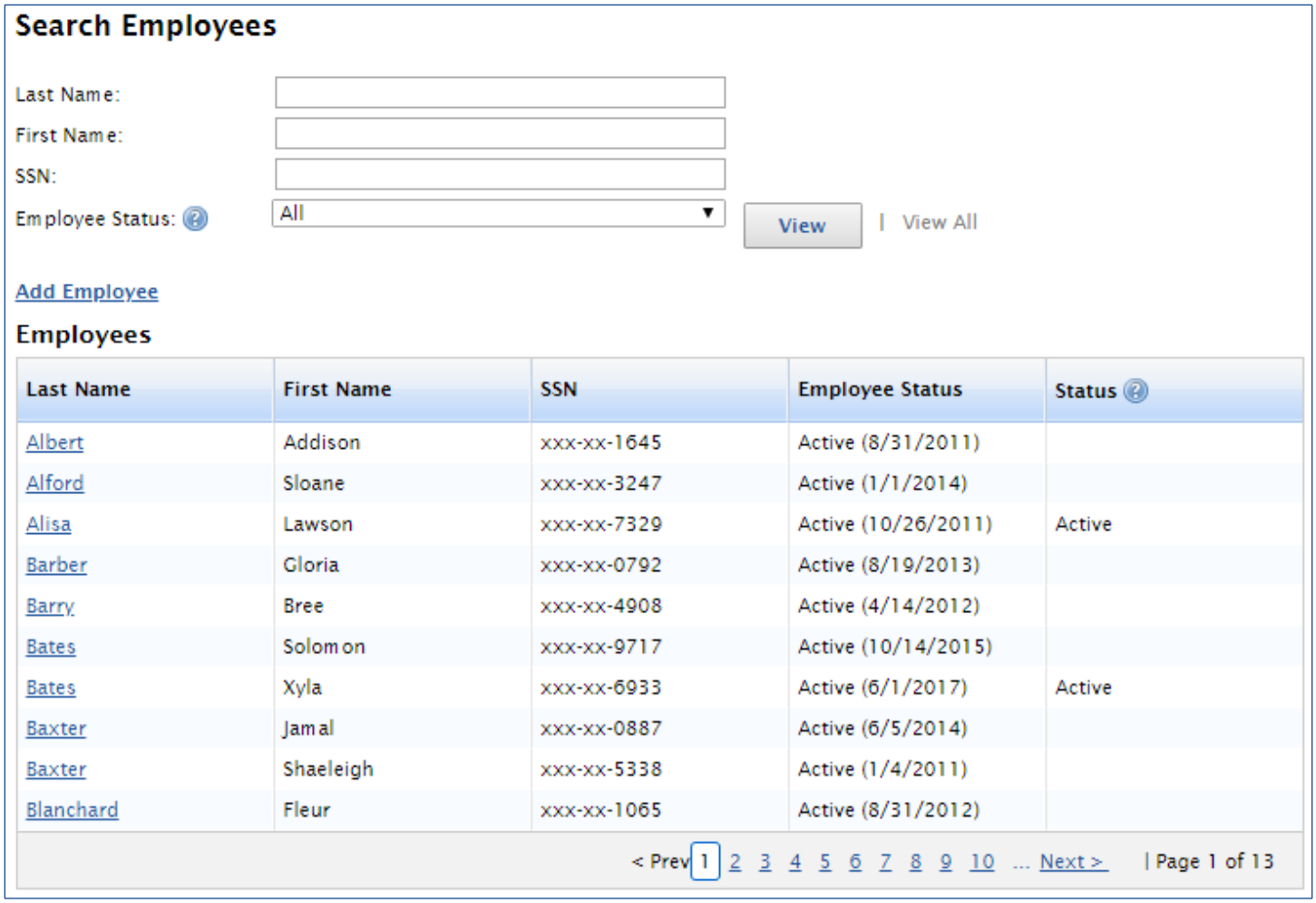


Table of Contents

Search Employees option is available from **View All Employees** for convenience
Add Employee option is available from **View All Employees** for convenience



Employees are displayed in a table format. The first four columns of the table (Last Name, First Name, SSN, and Employee Status) may be sorted alphabetically.

To sort a column (A – Z), click the column name. To sort a column (Z – A), click the column name a second time.

The Status column is regarding HSA activation status. Hover over the information bubble for a detailed description.

Table of Contents

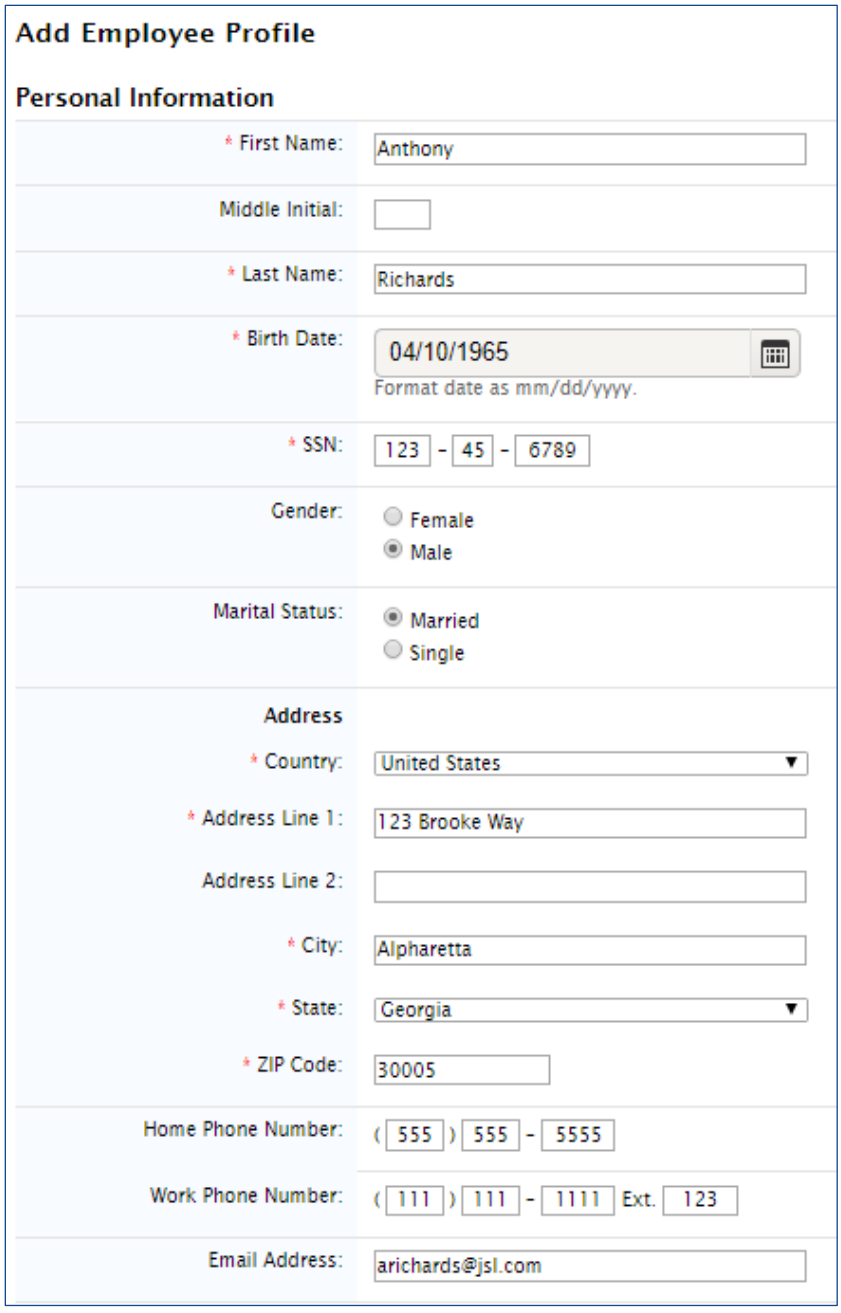
EMPLOYEES ▾ → Add Employee

If an employee is not in the Admin America system, they may be added through the Employer Portal.

Note: Both the Demographic section and the Enrollment section must be complete in order to add an employee to a plan.

Complete the following to add the Employee Demographics to the Admin America system:

- **Hover over the Employees tab and Click Add Employee**
- **Complete the Personal Information demographic section** *(see example)*



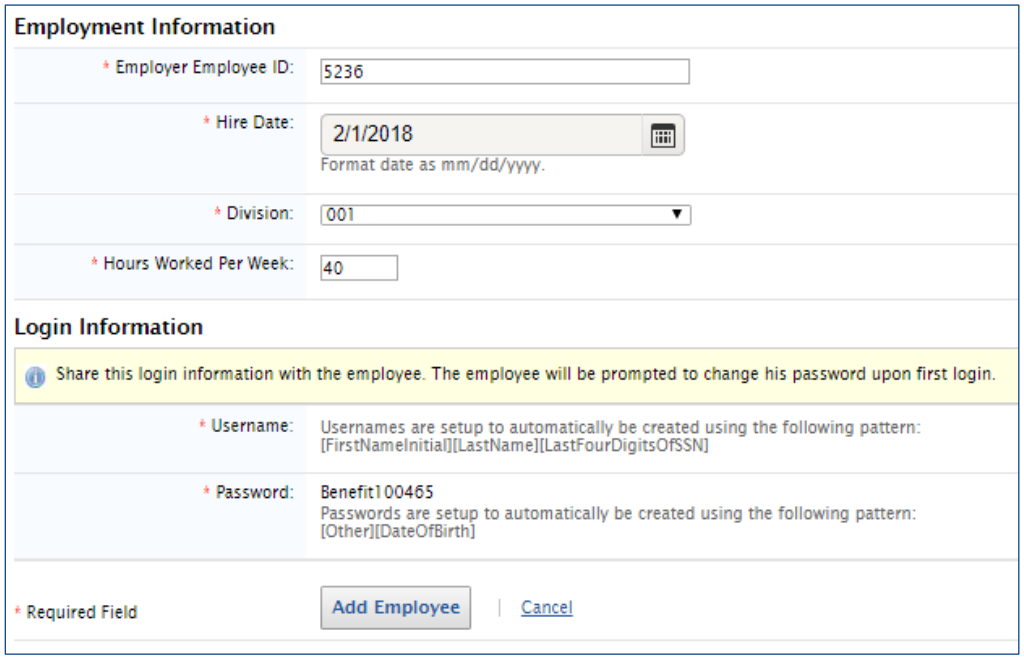
All * fields are required

Admin America strongly recommends supplying a valid email address. All account communications and receipt requests (if applicable) will be sent to the email address on file

Table of Contents

EMPLOYEES ▾ → Add Employee

Complete the following to add the Employee Demographics to the Admin America system:



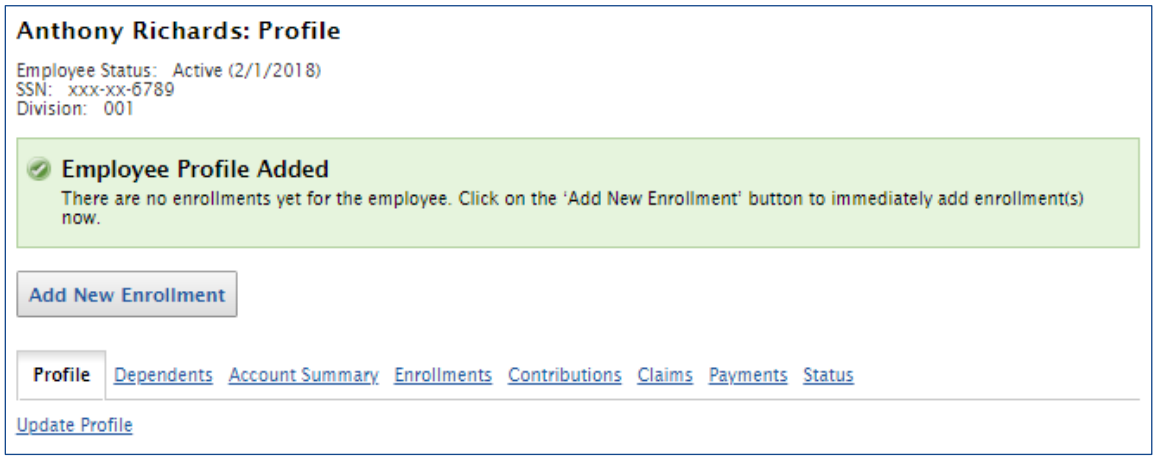
The Employer Employee ID field will pre-populate

Division is required only when multiple divisions are setup with Admin America

Login Information will automatically generate

- **Complete the Employment Information demographic section** *(see example)*
- **Click Add Employee**

Complete the following to add the Employee Enrollment to the Admin America system:



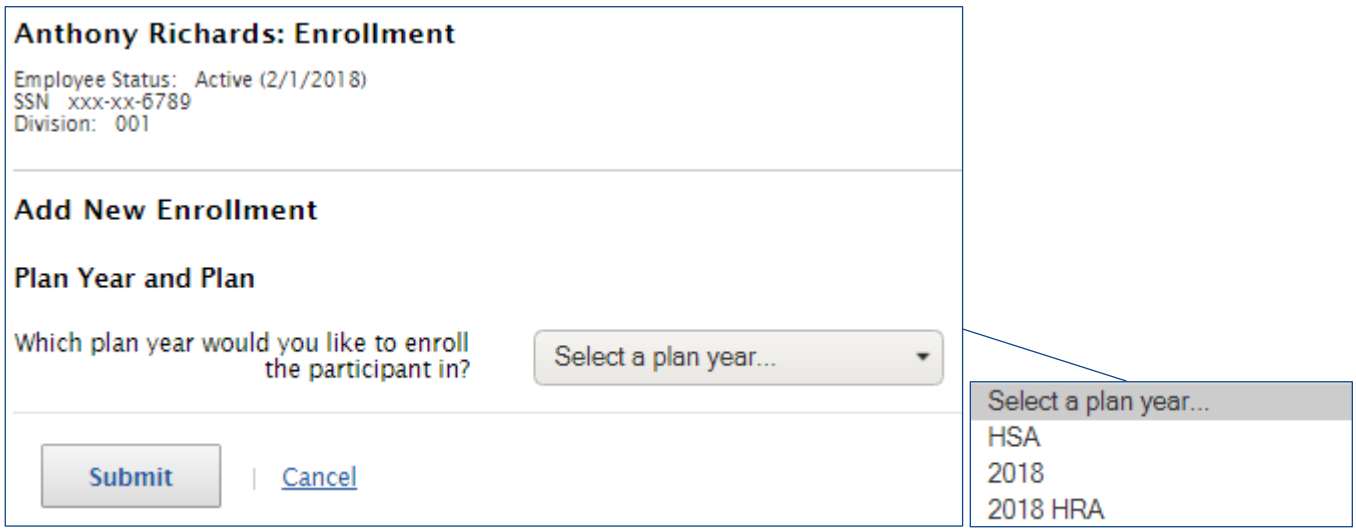
- **Click Add New Enrollment**

Table of Contents

EMPLOYEES ▾ → Add Employee

Complete the following to add the Employee Enrollment to the Admin America system:

- **Select the Plan Year**
  (dependent on setup, FSA plans are named after the plan year, HRA plans are named after the plan year plus 'HRA', and HSA plans are named 'HSA')



- **Dependent on the Plan Year selected, additional fields display. Complete all fields for the enrollment.**

FSA Enrollment Example

- **Check the FSA plan(s) to enroll the participant in** *(more than one may be checked)*
- **Select 'Benny Card' as the payment method if benefit cards are available to participants** *(Varies by Employer. If this option is **NOT** selected, a card will **NOT** generate for the participant)*
- **Select 'Direct Deposit' as the Alternative Method if Direct Deposit is offered under your plan(s)** *(Varies by Employer. Check will be created by default if the participant does not add a bank account)*
- **Select the Effective Date for the plan**
- **Enter Total Plan Year Election Amount**
- **Click Submit**

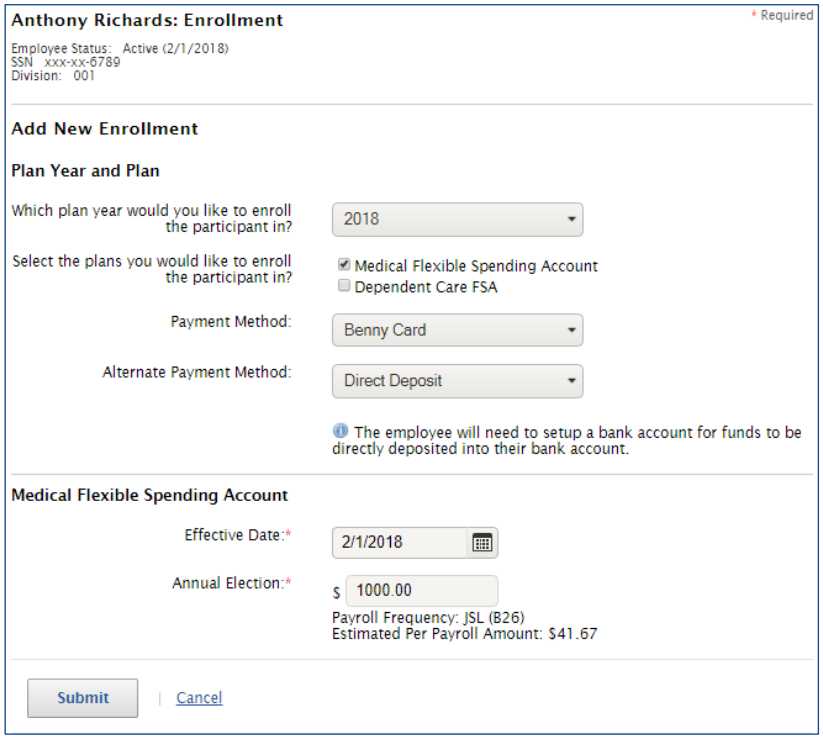


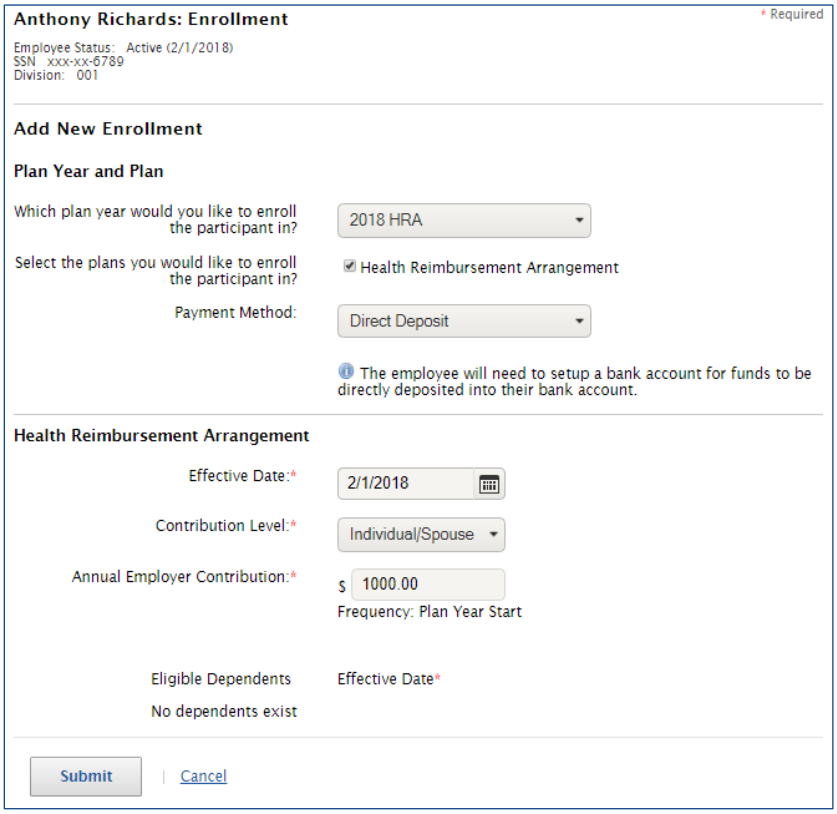
Table of Contents

EMPLOYEES ▾ → Add Employee

Complete the following to add the Employee Enrollment to the Admin America system:

HRA Enrollment Example

- **Check the HRA plan(s) to enroll the participant in** *(more than one may be checked)*
- **Select 'Direct Deposit' as the Payment Method if Direct Deposit is offered under your plan(s)** *(Varies by Employer. Check will be created by default if the participant does not add a bank account)*
- **Select the Effective Date for the plan**
- **Select the Contribution Level** *(the Annual Employer Contribution will Pre-populate dependent on Level)*
- **Click Submit**
- **The Enrollments tab will display for the participant**
- **Click the Dependents tab from this screen**
- **Click Add Dependent**
- **Enter the demographic information for the dependent** *(see example)*
- **Click Add Dependent** *(the dependent will automatically be enrolled in the HRA plan(s))*
- **Click OK to the Auto Enrollment Confirmation**



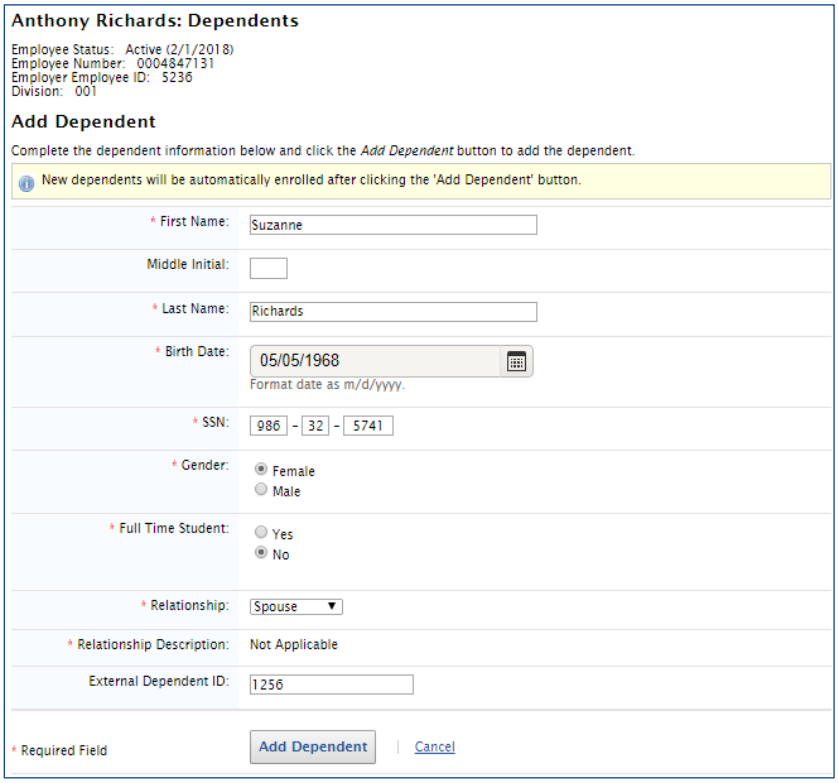


Table of Contents

Complete the following to add the Employee Enrollment to the Admin America system:

HSA Enrollment Example

- **Check the Health Savings Account box**
- **Select 'Benny Card' as the payment method if benefit cards are available to participants** *(Varies by Employer. If this option is **NOT** selected, a card will **NOT** generate for the participant)*
- **Select 'Direct Deposit' as the Alternative Method** *(Check will be created by default if the participant does not add a bank account)*
- **Select the Effective Date for the plan**
- **Enter the Coverage Level** *(Select 'Individual' if the participant is enrolled in an individual only high deductible health plan. Select 'Family' for all other enrollment tiers)*
- **Click Submit**

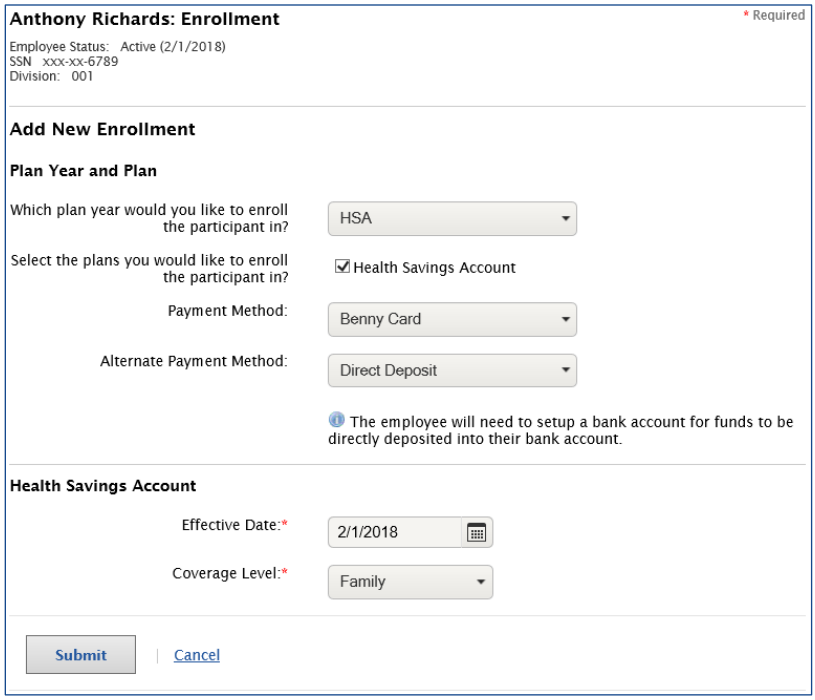
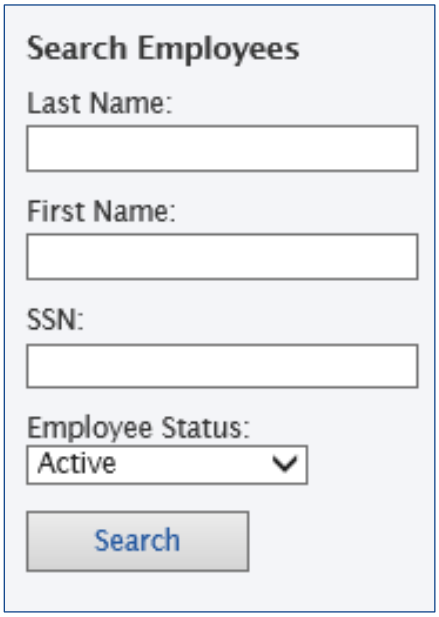


Table of Contents

Complete the following to search for an employee in the Admin America system:

- **Hover over the Employees tab**
- **Enter at least one of the following**
  - **Last Name** *(first letter(s) or the entire last name)*
  - **First Name** *(first letter(s) or the entire first name)*
  - **SSN** *(entire 9 digit SSN)*
- **Select the Employee Status** *('All' will search all* participants who have ever existed in the Admin America system, 'Active' will search all participants listed as Active in the Admin America system, 'Inactive' will seach all participants listed as terminated in the Admin America system)
- **Click Search**
- **The Profile tab for the participant will be displayed**
- **Other tabs will also be available**
  (tabs vary by plan, ie FSA, HRA, HSA)
  - **Dependents**
  - **Account Summary**
  - **Enrollments**
  - **Contributions**
  - **Claims**
  - **Payments**
  - **Status**



Note: If the employee demographic information is not in the Admin America system, the following message will display *(we recommend checking the spelling of the participant name and searching in* **View All Employees** *before adding the participant to the Admin America system)*

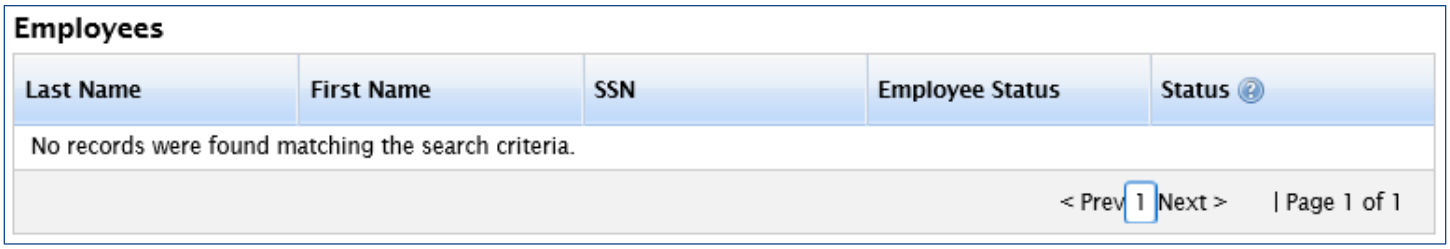


Table of Contents

The **Profile tab** lists demographic information about the employee, such as Name, Address, Email, etc.

Addison Albert: Profile

Employee Status: Active (8/31/2011)
SSN: xxx-xx-1645
Division: 001

Profile | Dependents | Account Summary | Enrollments | Contributions | Claims | Payments | Status

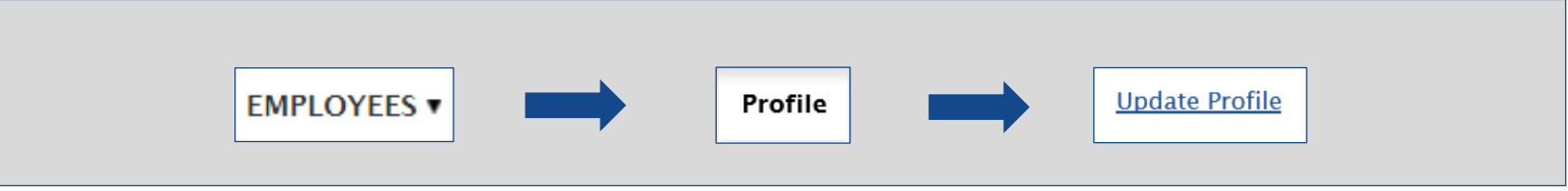
Update Profile

Personal Information

Name:	Addison Albert
Username:	aalbert1645
SSN:	xxx-xx-1645
Gender:	--
Marital Status:	--
Address:	9534 Lacinia Rd Alpharetta, GA 30023 United States
Home Phone:	(770) 543-3657
Work Phone:	--
Email:	AAlbert@jands.com

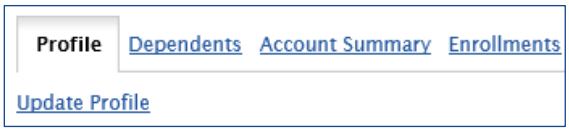
Employment Information

Status:	Active
Status Effective Date:	8/31/2011
Employee Number:	0004387642
Employer Employee ID:	966781645
Hire Date:	8/31/2011
Division:	001
Hours Worked Per Week:	40

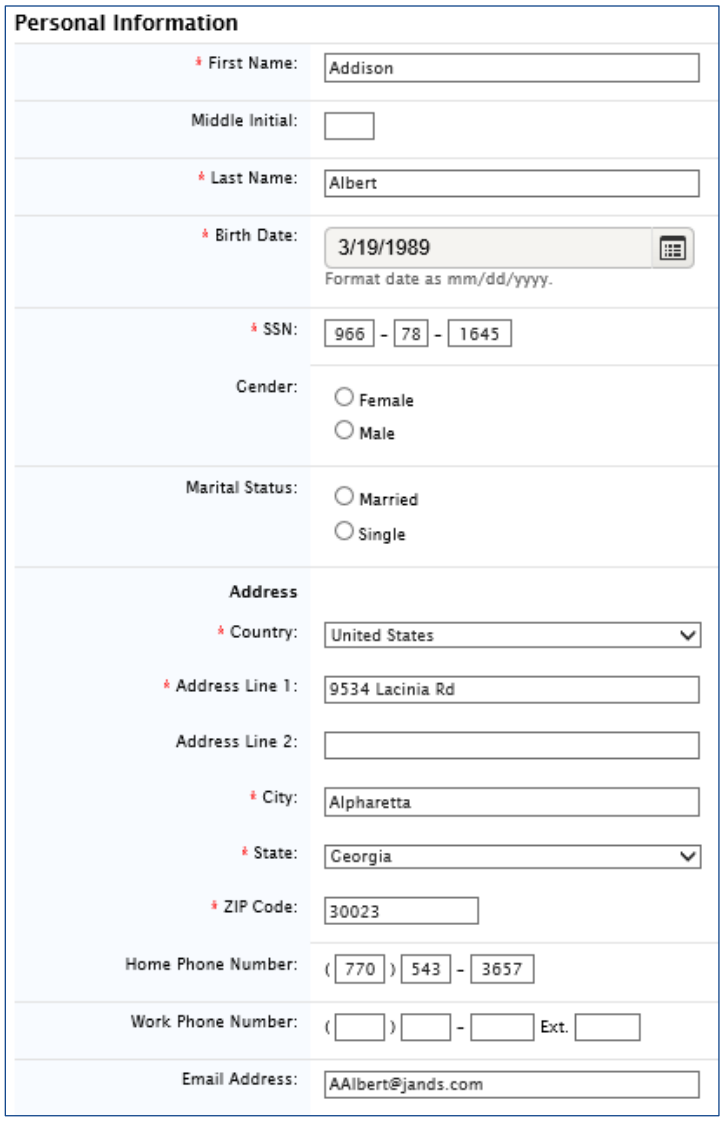


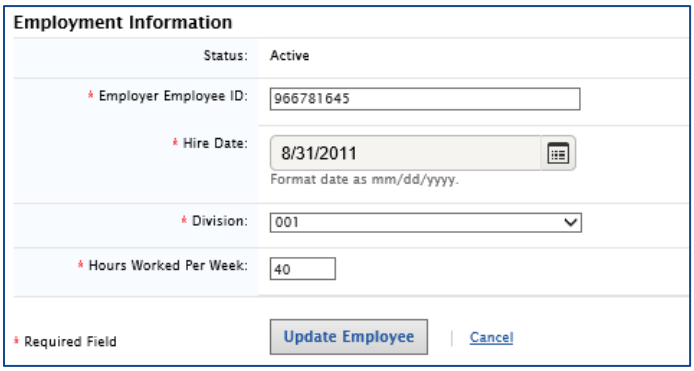
Complete the following to Update the Profile demographic information:

- Search for the Employee from the Employees tab
- The Profile tab will be displayed
- Click Update Profile



- Update the Personal Information section and/or the Employment Information section *(see example)*





- Click Update Employee

Table of Contents

The **Dependents tab** lists spouse, child, and other dependent demographic information.

Eligible Dependents* are NOT required for non-HRA (non-Health Reimbursement Arrangement) accounts (i.e. FSA and HSA accounts). Eligible Dependents* are NOT required for 213 HRA accounts. All expenses under these plans will fall under the primary account holder name regardless of patient name.

Eligible Dependents* are required for HRA (Health Reimbursement Arrangement) accounts unless the HRA account is classified as a 213 HRA.

***Eligible Dependents** are spouses, children, and other dependents under the account whose expenses are reimbursable by the account

- To **Expand** the Dependent information click
- To **Close** the Dependent information click
- To **Update** Dependent information click

- To **Add** a Dependent click

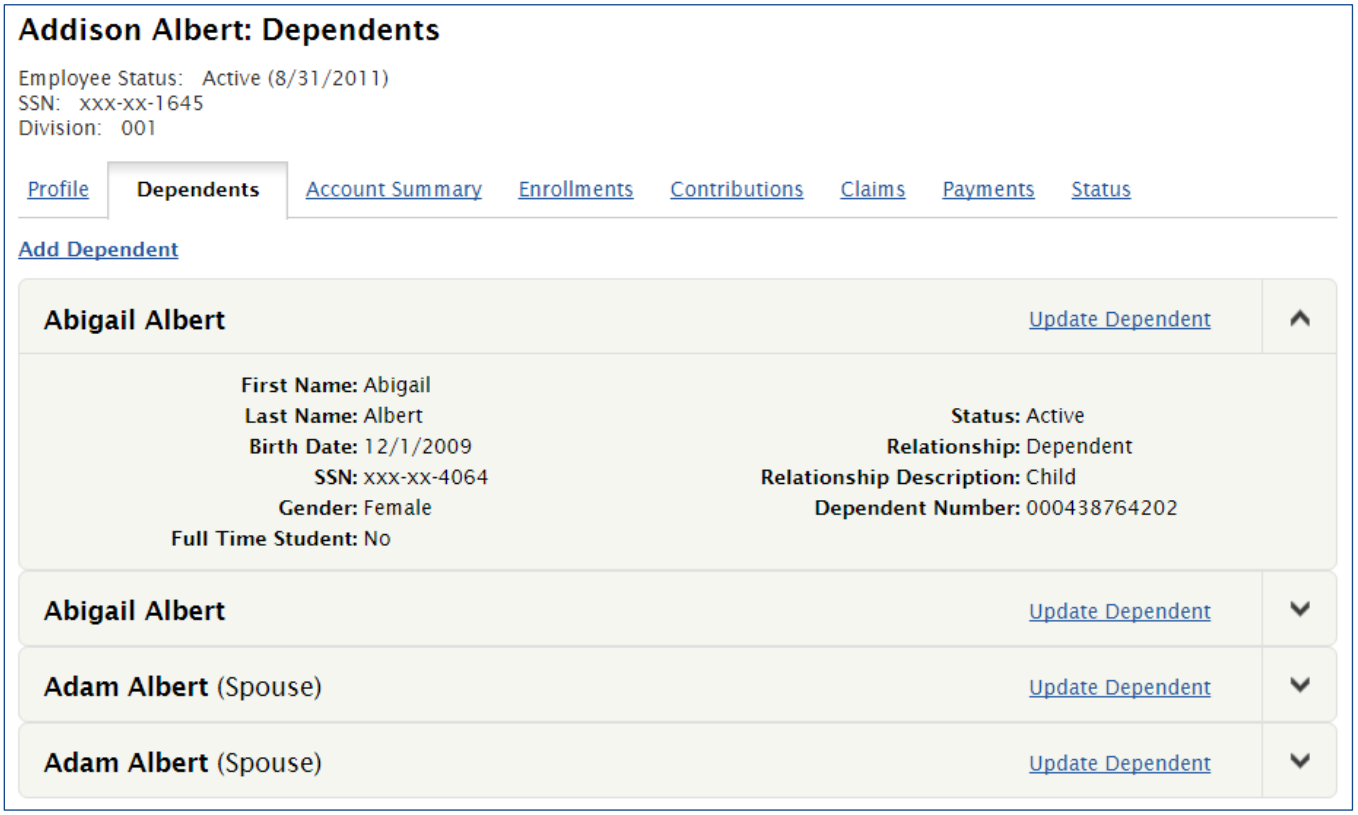
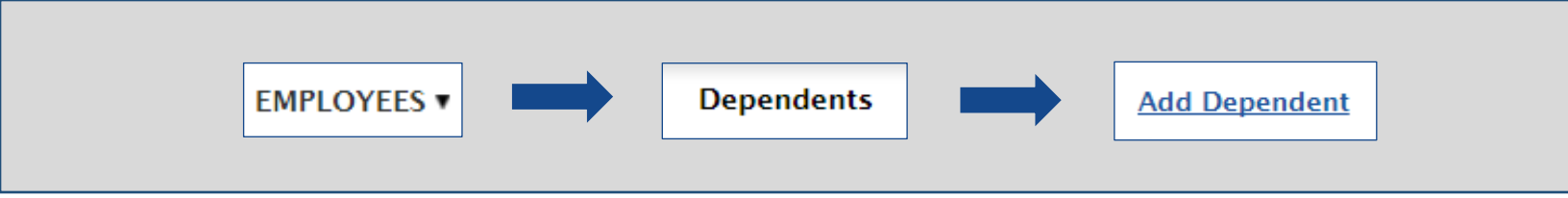
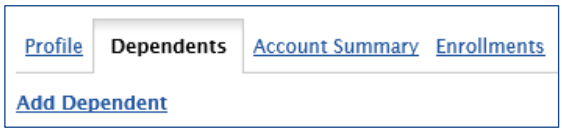


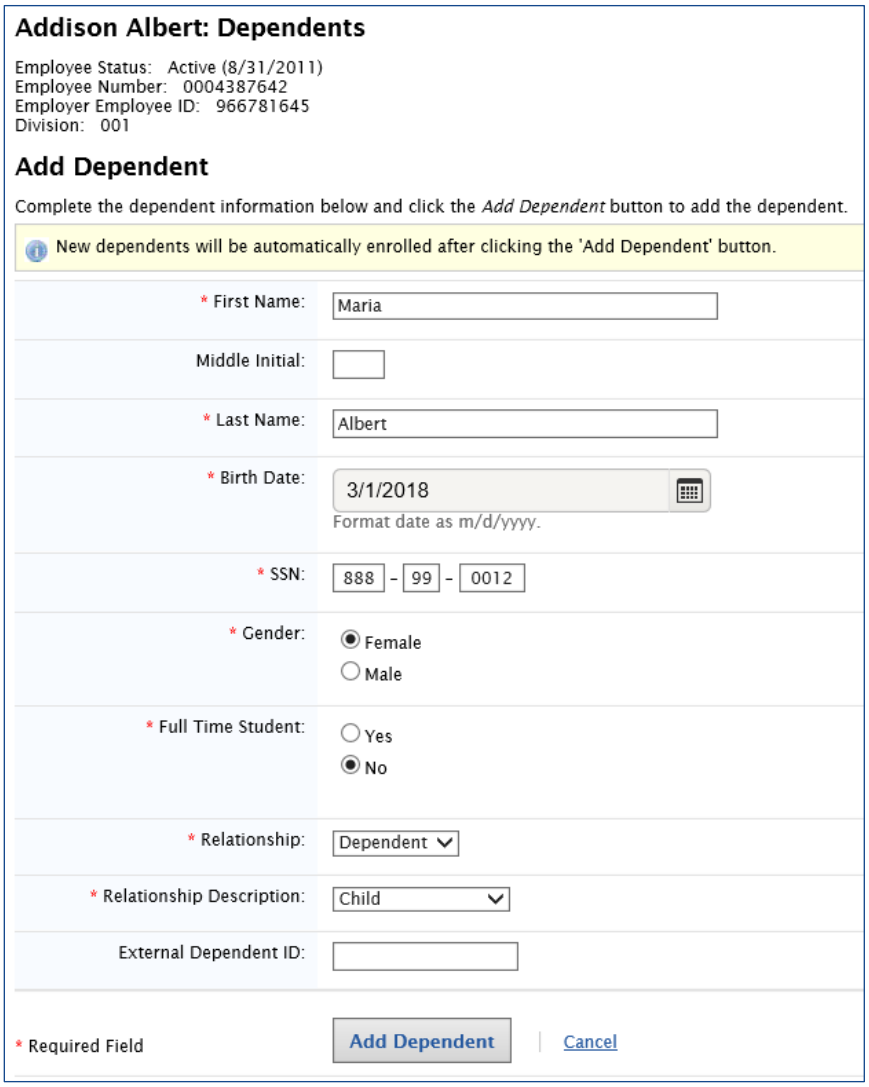
Table of Contents



Complete the below to Add a Dependent

- Search for the Employee from the Employees tab
- The Profile tab will be displayed
- Click the Dependents tab
- Click Add Dependent
- Enter the demographic information for the dependent *(see example)*





- Click Add Dependent *(the dependent will automatically be enrolled in the HRA plan(s))*
- Click OK to the Auto Enrollment Confirmation

Note: The External Dependent ID is not required. Added Dependents will be automatically enrolled in any plans the employee participates in after submission for an effective date equal to the employee effective date or equal to the dependent's date of birth (whichever is later). ***If the Dependent has a different effective date than the employee, Click Here to learn how to make corrections to the dependent effective date.***

Table of Contents

The **Account Summary tab** lists tables for Active and Previous Accounts.

Active Accounts are accounts that a participant may be reimbursed from based on the current date and enrollment.

Previous Accounts are accounts that a participant may no longer be reimbursed from based on the current date and enrollment.

Addison Albert: Account Summary

Employee Status: Active (8/31/2011)
SSN: xxx-xx-1645
Division: 001

Add New Enrollment

Profile | Dependents | **Account Summary** | Enrollments | Contributions | Claims | Payments | Status

The "**Eligible Amount**" shown is the sum of the Annual Election amount, plus certain credits that have been applied to the account.
The "**Available Balance**" reflects the available funds at this time based on YTD contribution credits less amounts disbursed to date.

Active Accounts

Account	Eligible Amount	Submitted Claims	Plan Year Balance	Available Balance	Cash Balance
Health Reimbursement Arrangement 1/1/2018 - 12/31/2018	$1,500.00	$0.00	$1,500.00	$1,500.00	$1,500.00
Medical Flexible Spending Account 1/1/2018 - 12/31/2018	$2,000.00	$0.00	$2,000.00	$2,000.00	$384.60
Dependent Care FSA 1/1/2018 - 12/31/2018	$1,000.00	$0.00	$1,000.00	$192.30	$192.30
Medical Flexible Spending Account 1/1/2017 - 12/31/2017	$2,000.00	$1,674.00	$326.00	$326.00	$326.00
Dependent Care FSA 1/1/2017 - 12/31/2017	$1,000.00	$850.00	$150.00	$150.00	$150.00
Health Reimbursement Arrangement 1/1/2017 - 12/31/2017	$1,500.00	$2,000.00	$0.00	$0.00	$0.00

Enrollment Summary for Dependent Care FSA

Effective Date:	1/1/2017
Annual Election:	$1,000.00
Employer Contributions:	$0.00 of $0.00
Employee Contributions:	$1,000.00 of $1,000.00
Payroll Deduction:	$38.46 JSL (B26)

Claim Summary for Medical Flexible Spending Account

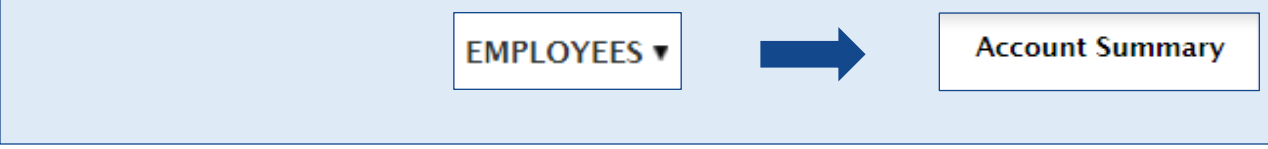
Submitted Claims:	$1,674.00
Pending:	$0.00
Paid:	$1,450.00
Denied:	$224.00
Refunds:	$0.00

Previous Accounts

Account	Eligible Amount	Submitted Claims	Plan Year Balance	Available Balance	Cash Balance
Medical Flexible Spending Account 1/1/2016 - 12/31/2016	$1,000.00	$814.98	$216.42	$216.42	$216.42
Health Reimbursement Arrangement 1/1/2016 - 12/31/2016	$1,500.00	$0.00	$1,500.00	$1,500.00	$1,500.00

Hover over the information bubbles for additional details about these amounts

Table of Contents



Addison Albert: Account Summary

Employee Status: Active (8/31/2011)
SSN: xxx-xx-1645
Division: 001

Add New Enrollment

Profile | Dependents | **Account Summary** | Enrollments | Contributions | Claims | Payments | Status

The "**Eligible Amount**" shown is the sum of the Annual Election amount, plus certain credits that have been applied to the account.
The "**Available Balance**" reflects the available funds at this time based on YTD contribution credits less amounts disbursed to date.

Active Accounts

Account	Eligible Amount	Submitted Claims	Plan Year Balance	Available Balance	Cash Balance
Health Reimbursement Arrangement 1/1/2018 - 12/31/2018	$1,500.00	$0.00	$1,500.00	$1,500.00	$1,500.00
Medical Flexible Spending Account 1/1/2018 - 12/31/2018	$2,000.00	$0.00	$2,000.00	$2,000.00	$384.60
Dependent Care FSA 1/1/2018 - 12/31/2018	$1,000.00	$0.00	$1,000.00	$192.30	$192.30
Medical Flexible Spending Account 1/1/2017 - 12/31/2017	$2,000.00	$1,674.00	$326.00	$326.00	$326.00
Dependent Care FSA 1/1/2017 - 12/31/2017	$1,000.00	$850.00	$150.00	$150.00	$150.00
Health Reimbursement Arrangement 1/1/2017 - 12/31/2017	$1,500.00	$2,000.00	$0.00	$0.00	$0.00

Click the Account Name to bring a popup Description and Overview of the Plan

Account
Health Reimbursement Arrangement 1/1/2018 - 12/31/2018
Medical Flexible Spending Account 1/1/2018 - 12/31/2018
Dependent Care FSA 1/1/2018 - 12/31/2018

Click the Eligible Amount in the Eligible Amount column to go to the Enrollments Tab

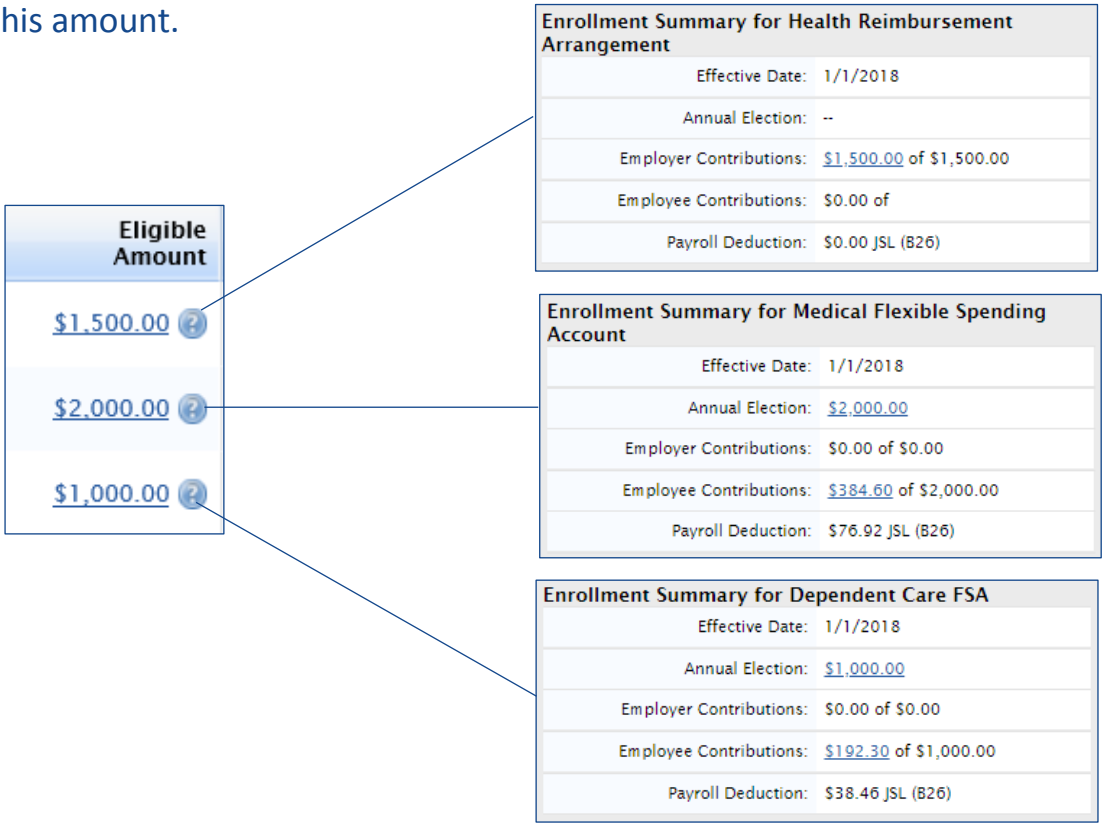
Eligible Amount
$1,500.00
$2,000.00
$1,000.00

Click the Submitted Claims Amount in the Submitted Claims column to go to the Claims Tab

Submitted Claims
$1,674.00
$850.00
$2,000.00

Table of Contents

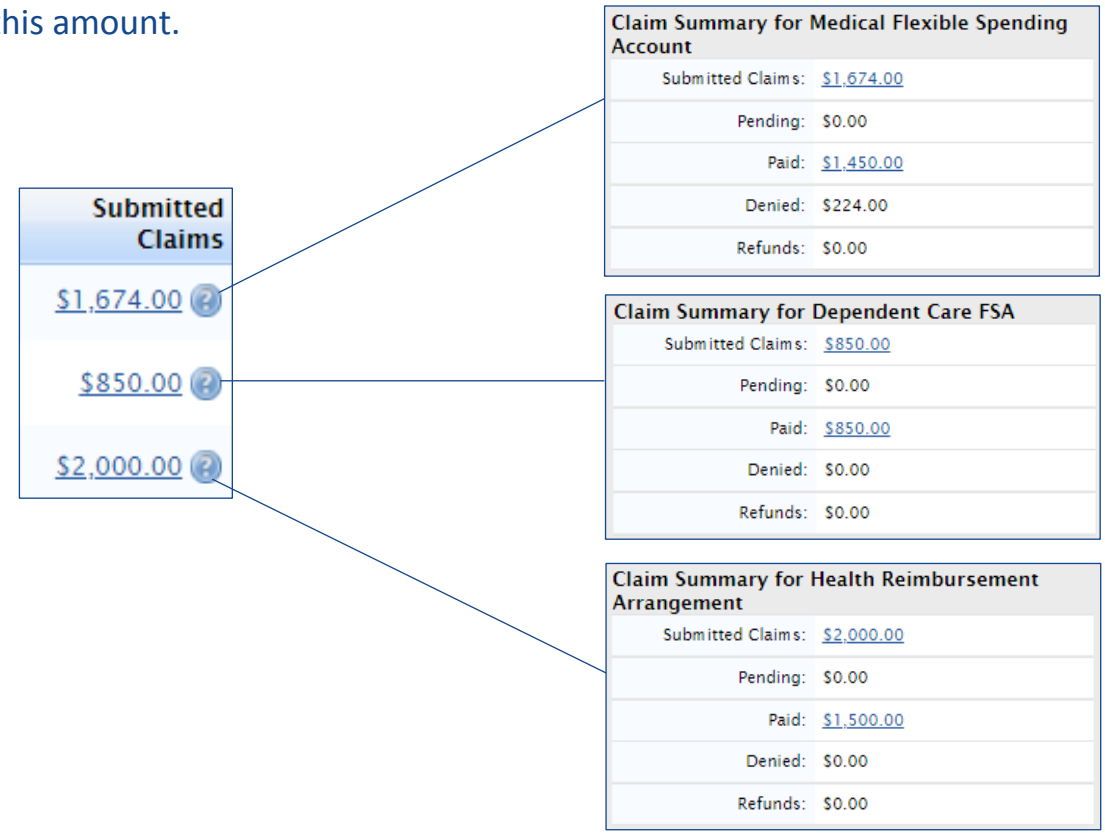
Hover over the information bubble under the **Eligible Amount** column to see the breakdown of this amount.



- **Effective Date** lists the participant enrollment effective date for the specified plan year
- **Annual Election** lists the amount the participant elected for the specified plan year. This is not applicable for the HRA.
- **Employer Contributions** lists the amount the employer has contributed to date *(based on Annual Contribution divided by the number of contributions that will be made during the Plan year)* of the total amount the employer will have contributed by the end of the Plan year. *Note: Medical FSA Accounts are prefunded, and the employees have access to the full Annual Election at the beginning of the Plan year.*
- **Employee Contributions** is the amount the participant has contributed to date *(based on Annual Contribution divided by the number of contributions that will be made during the Plan year)* of the total amount the employee will have contributed by the end of the Plan year. *Note: Medical FSA Accounts are prefunded, and the employees have access to the full Annual Election at the beginning of the Plan year.*
- **Payroll Deduction** is the estimated amount the employee will contribute to the account based on the number of paychecks during the Plan year. *Note: the actual amount the employer deducts from payroll is not computed within our system. This amount is an estimate only.*

Table of Contents

Hover over the information bubble under the **Eligible Amount** column to see the breakdown of this amount.



- **Submitted Claims** is the total amount in claims submitted to the account regardless of approved or denied status
- **Pending** is the amount in claims submitted that have been approved, but have not been paid to the employee as of yet. *Note: this amount will move to paid on your next processing date.*
- **Paid** is the amount in claims that have been approved and paid to the employee
- **Denied** is the amount in claims that have been denied. If a claim was originally paid via the debit card, and was later denied, this denial will cause a repayment request on the employee account. If a claim was not paid previously *(i.e. not a debit card transaction)*, and the claim was denied, a repayment request will NOT occur.
- **Refunds** is the amount in claims that had been originally paid via the debit card, and have later been refunded by the provider to the employee's debit card.

Table of Contents

The **Plan Year Balance, Available Balance, and Cash Balance** of the Account Summary Table(s) are defined below.

Plan Year Balance	Available Balance	Cash Balance
$326.00	$326.00	$326.00
$150.00	$150.00	$150.00
$0.00	$0.00	$0.00

Plan Year Balance

- The Amount remaining in the account after the following calculation:

  Sum the following *(as applicable)*

  1. Eligible Amount
     a. Employee Contributions plus remaining Employee Contributions for the plan year
     b. Employer Contributions plus remaining Employer Contributions for the plan year
     c. Rollover

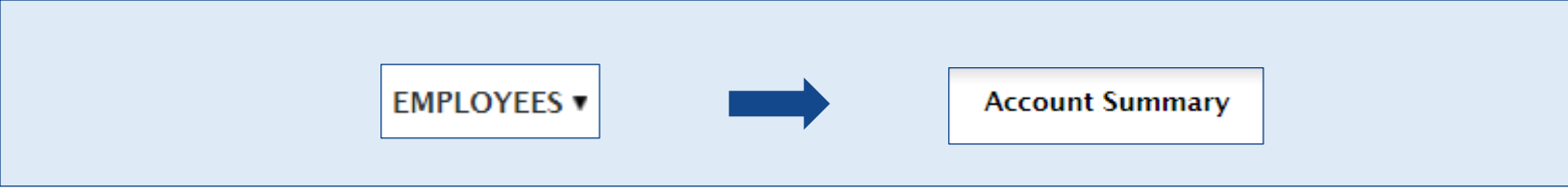
  Less the following *(as applicable)*

  1. Pending Claims
  2. Paid Claims
  3. Pending Repayments
  4. Scheduled Repayments
  5. Debit Card Reissue Fees
  6. Debit Adjustments

Available Balance

- The Amount remaining in the account that may be used on unreimbursed eligible expenses.

  Denied Claims that need to be repaid, and have not been repaid, will not be available to the participant. Once repayment is made, the funds will be available under the Available Balance.



The **Plan Year Balance, Available Balance, and Cash Balance** of the Account Summary Table(s) are defined below.

Plan Year Balance	Available Balance	Cash Balance
$326.00	$326.00	$326.00
$150.00	$150.00	$150.00
$0.00	$0.00	$0.00

Cash Balance

- The Amount after the following calculation:

  Sum the following *(as applicable)*

  1. Eligible Amount to Date
     a. Employee Contributions to Date
     b. Employer Contributions to Date
     c. Rollover
  2. Debit Card Refunds
  3. Credit Adjustments

  Less the following *(as applicable)*

  1. Paid Claims
  2. Pending Repayments
  3. Scheduled Repayments
  4. Debit Card Reissue Fees
  5. Debit Adjustments

The **Enrollments tab** lists Active and Previous Accounts

Active Accounts are accounts that a participant may be reimbursed from based on the current date and enrollment.

Previous Accounts are accounts that a participant may no longer be reimbursed from based on the current date and enrollment.

Addison Albert: Enrollments

Employee Status: Active (8/31/2011)
SSN: xxx-xx-1645
Division: 001

Add New Enrollment

Profile | Dependents | Account Summary | **Enrollments** | Contributions | Claims | Payments | Status

Active Accounts

1/1/2018 - 12/31/2018
Payment Method: Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
HRA - Active	1/1/2018	--	$1,500.00 of $1,500.00	$0.00 of $0.00	--	Update

1/1/2018 - 12/31/2018
Payment Method: Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
Medical FSA - Active	1/1/2018	$2,000.00	$0.00 of $0.00	$384.60 of $2,000.00	$76.92 JSL (B26)	Update
Dependent Care FSA - Active	1/1/2018	$1,000.00	$0.00 of $0.00	$192.30 of $1,000.00	$38.46 JSL (B26)	Update

1/1/2017 - 12/31/2017
Payment Method: Benny Card | Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
Medical FSA - Active	1/1/2017	$2,000.00	$0.00 of $0.00	$2,000.00 of $2,000.00	$76.92 JSL (B26)	Update
Dependent Care FSA - Active	1/1/2017	$1,000.00	$0.00 of $0.00	$1,000.00 of $1,000.00	$38.46 JSL (B26)	Update

1/1/2017 - 12/31/2017
Payment Method: Direct Deposit

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
HRA - Active	1/1/2017	--	$1,500.00 of $1,500.00	$0.00 of $0.00	--	Update

Previous Accounts

1/1/2016 - 12/31/2016
Payment Method: Benny Card | Check

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction
Medical FSA	1/1/2016	$1,000.00	$0.00 of $0.00	$1,000.00 of $1,000.00	$37.04 JSL (B26)

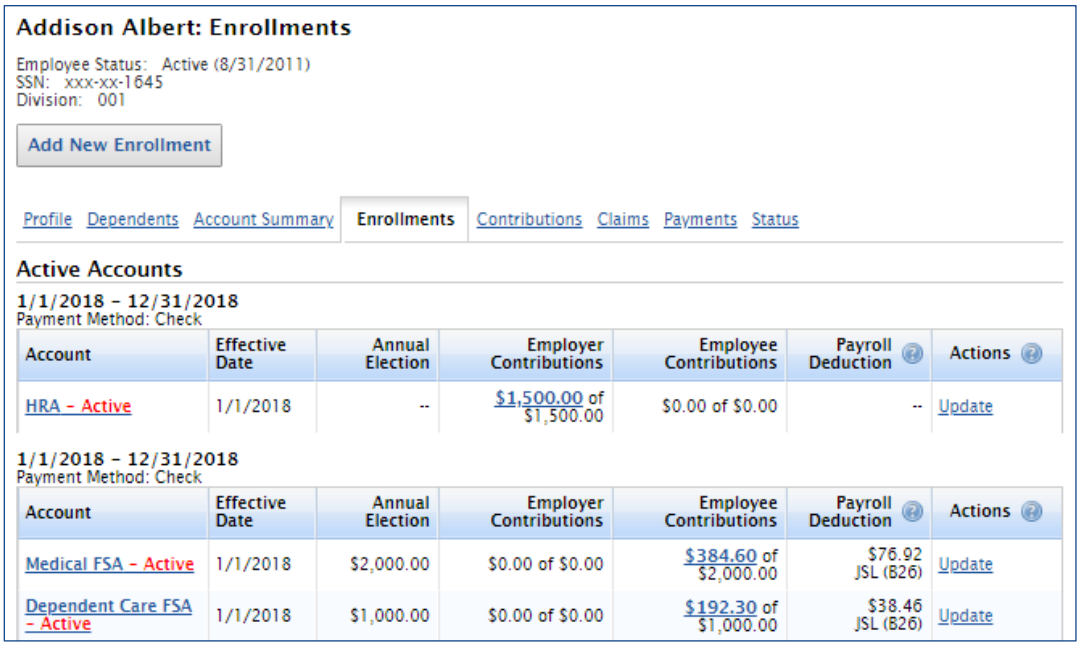
1/1/2016 - 12/31/2016
Payment Method: Direct Deposit

Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction
HRA	1/1/2016	--	$1,500.00 of $1,500.00	$0.00 of $0.00	--

Estimated Payroll Deductions are based on the employee's election and the number of scheduled pay periods within the plan year. True deductions are determined by JOHNSON & SMITH LLC. Estimated Payroll Deductions are not calculated for the plans with no assumed payroll deductions.

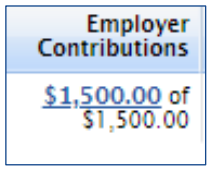
The Update action is used to change an existing election. If there is an error in the amount elected for a plan or if a change needs to occur mid-year (i.e. qualifying life event), use the Update button to make the needed changes. If you need to enroll an employee in a plan for the first time, use the Add Enrollment link at the top of this page.

Table of Contents



Click the Account Name to bring a popup Description and Overview of the Plan

Click the Employer Contributions Amount in the Employer Contributions column to go to the Contributions Tab



Click the Employee Contributions Amount in the Employee Contributions column to go to the Contributions Tab

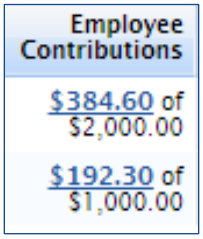
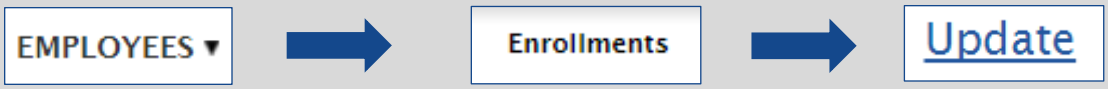


Table of Contents



The Update link may be used to update a plan enrollment. There are two situations that allow an update to a plan:

1. **Incorrect Election or Contribution Level that needs to be changed as of the employee's Plan Effective Date**

2. **Qualifying Event* where an election or enrollment needs to be changed as of the employee's Qualifying Event Date**

   Medical FSA, Limited Purpose FSA, and HRA
   A Qualifying Event is due to a decrease or increase in household size or when an eligible individual receives loss of coverage. When a plan update is made due to a Qualifying Event the update will be effective as of the qualifying event date. The prior plan in the system will remain in effect for dates of service prior to the qualifying event date.

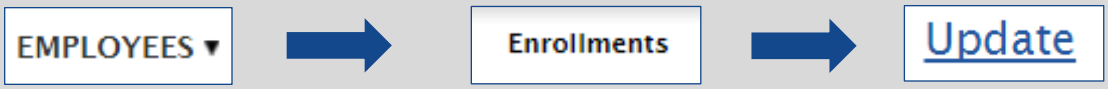
   Dependent Care FSA
   A Qualifying Event is due to an increase or decrease in child care tuition, or no longer being in need of child care.

   Parking and Transit FSA
   May be updated on a month by month basis based on need.

***A Qualifying Event** must be in line with the change being made (i.e. if the household grows in size, a Medical FSA Election may increase, but may not decrease).*

Please contact Admin America or your legal department if you are uncertain if the event is a Qualifying Event or if you are uncertain if the change being made is in line with the Qualifying Event.

Table of Contents

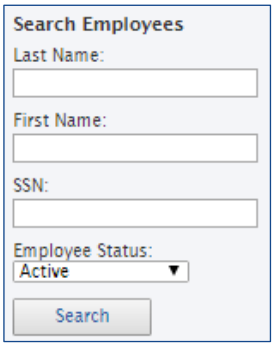


When to Update a Plan due to an Incorrect Election or Contribution Level

An Incorrect Election or Contribution Level is usually due to an administrative error. When a plan update is made due to an Incorrect Election or Contribution Level the update will override the existing plan in the system.

Complete the below to update an enrollment due to an Incorrect Election or Contribution Level

- **Search for the Employee from the Employees tab**



- **The Profile tab will be displayed**
- **Select the Enrollments tab for this Participant**
- **Find the Account name (plan name) that needs to be updated**
- **Click Update in the Actions column**
- **Select 'Correct an existing election amount or effective date.' Click Continue**

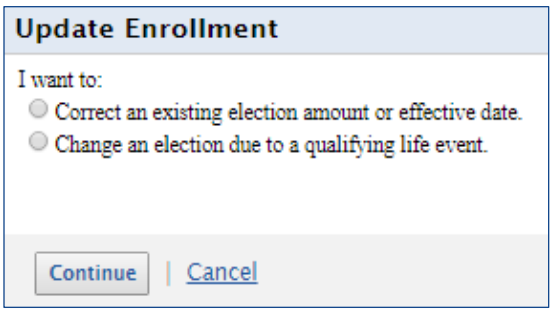
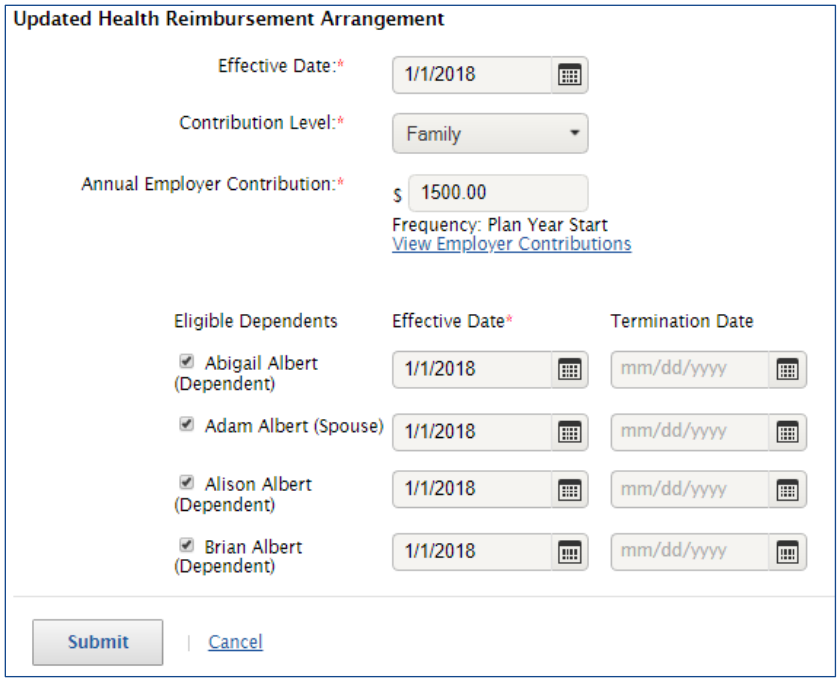


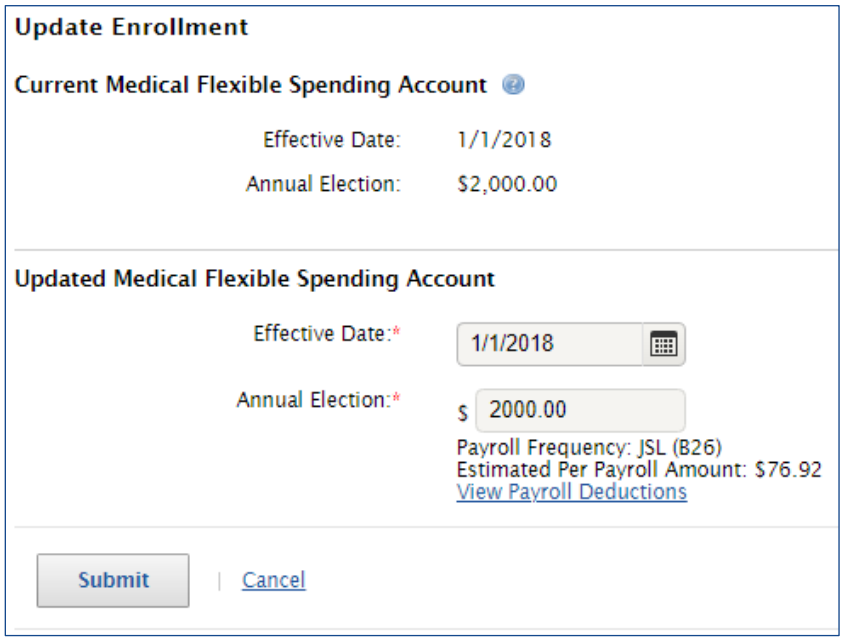
Table of Contents

- **Update the plan enrollment** *(see HRA example and Medical FSA example below)*



HRA EXAMPLE
Update (as applicable)

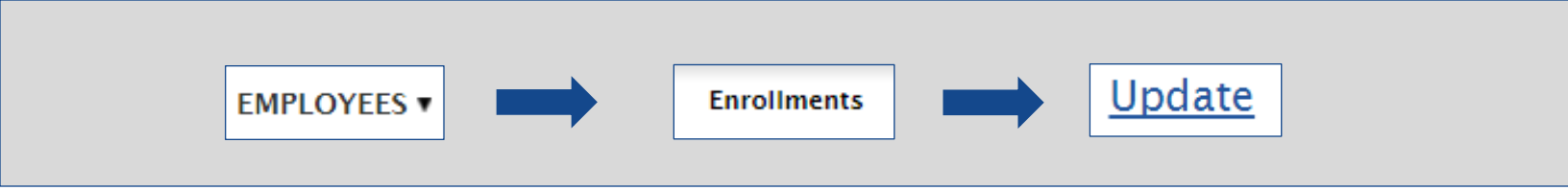
- **Participant Effective Date**
- **Contribution Level**
- **Annual Employer Contribution** *(auto-populates based on Contribution Level)*
- **Dependent Effective Date(s)**
- **Check Eligible Dependents**
- **Uncheck Ineligible Dependents**
- **Click Submit**



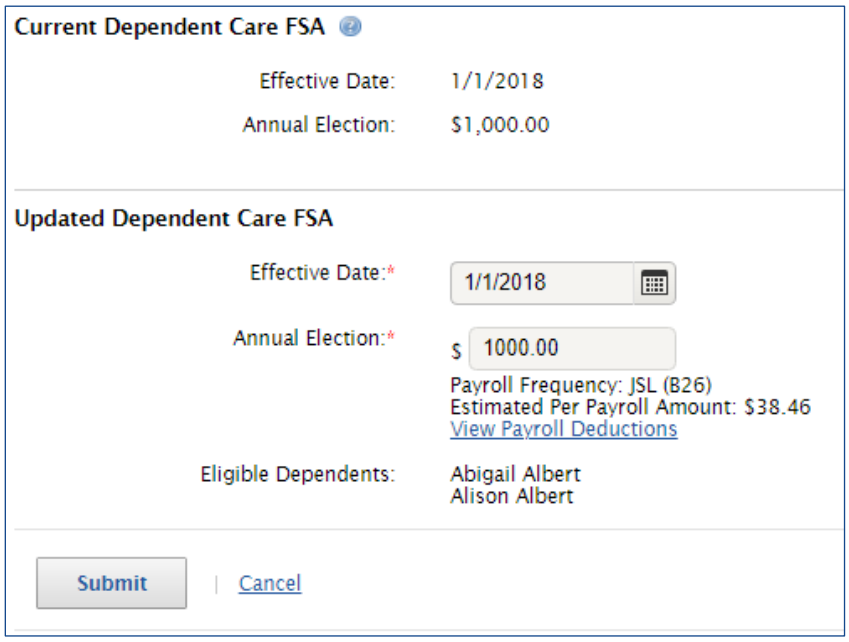
MEDICAL FSA EXAMPLE
Update (as applicable)

- **Participant Effective Date**
- **Annual Election**
- **Click Submit**

Table of Contents



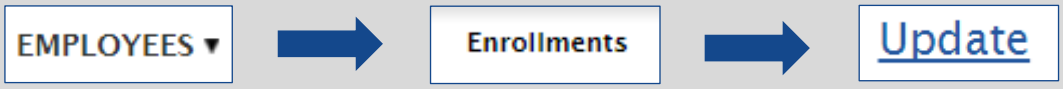
- **Update the plan enrollment** *(see Dependent Care FSA example below)*



DEPENDENT CARE FSA EXAMPLE
Update (as applicable)

- **Participant Effective Date**
- **Annual Election**
- **Click Submit**

Table of Contents



When to Update a Plan due to a Qualifying Event

- **Medical FSA, Limited Purpose FSA, and HRA**
  A Qualifying Event is due to a decrease or increase in household size or when an eligible individual receives loss of coverage. When a plan update is made due to a Qualifying Event the update will be effective as of the qualifying event date. The prior plan in the system will remain in effect for dates of service prior to the qualifying event date.

- **Dependent Care FSA**
  A Qualifying Event is due to an increase or decrease in child care tuition, or no longer being in need of child care.

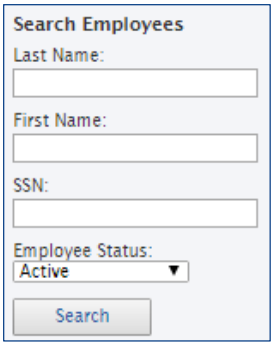
- **Parking and Transit FSA**
  May be updated on a month by month basis based on need.

***A Qualifying Event** must be in line with the change being made (i.e. if the household grows in size, a Medical FSA Election may increase, but may not decrease).*

Please contact Admin America or your legal department if you are uncertain if the event is a Qualifying Event or if you are uncertain if the change being made is in line with the Qualifying Event.

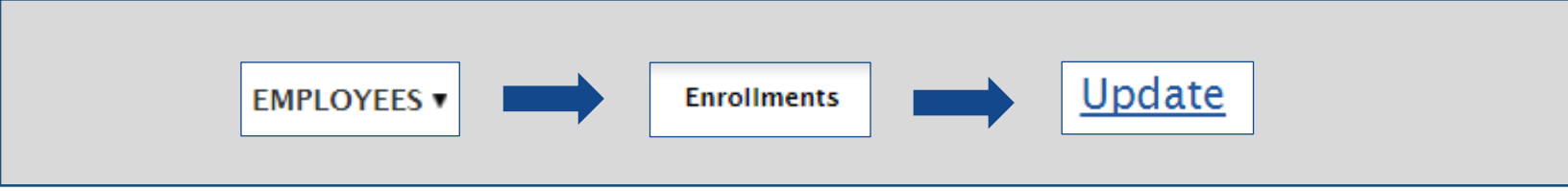
Complete the below to update an enrollment due to a Qualifying Event

- **Search for the Employee from the Employees tab**

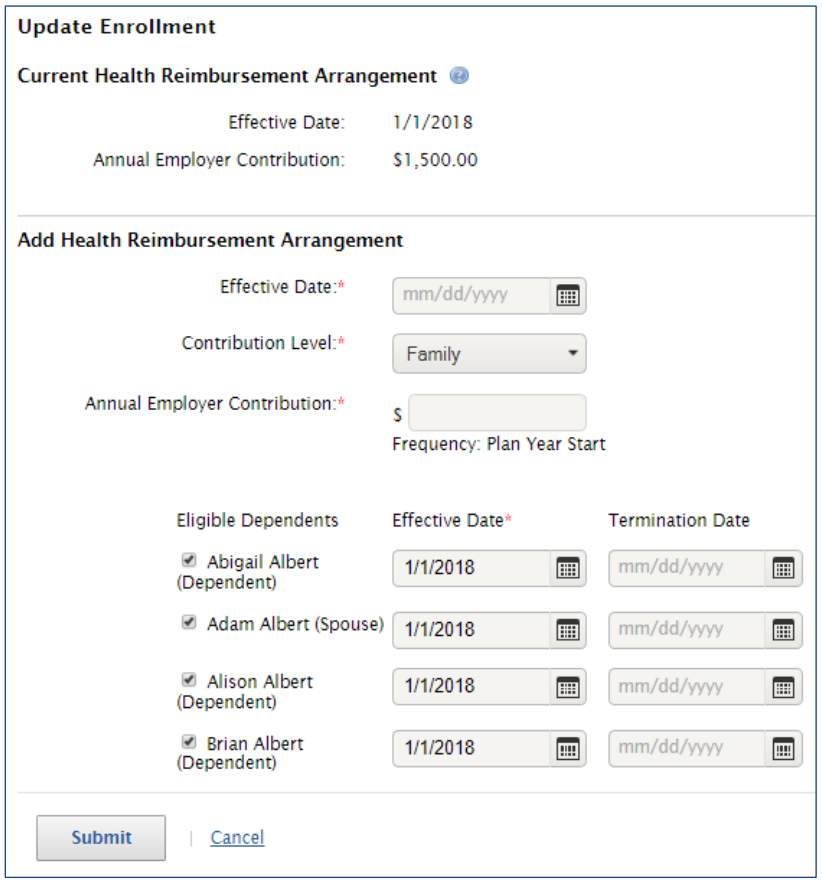


- **The Profile tab will be displayed**
- **Select the Enrollments tab for this Participant**
- **Find the Account name (plan name) that needs to be updated**
- **Click Update in the Actions column**
- **Select 'Change an election due to qualifying life event.' Click Continue**

Table of Contents

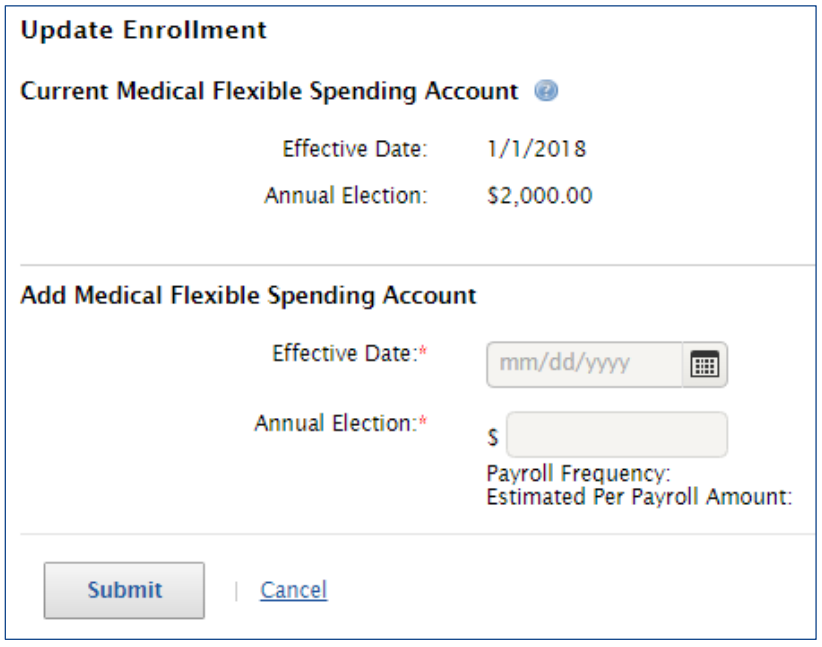


- **Enter the new plan enrollment** *(see HRA example and Medical FSA example below)*



HRA EXAMPLE

- **Participant Effective Date** *(Qualifying Event Date)*
- **New Contribution Level**
- **Annual Employer Contribution** *(auto-populates based on Contribution Level)*
- **Dependent Effective Date(s)** *(Qualifying Event Date)*
- **Check Eligible Dependents**
- **Uncheck Ineligible Dependents**
- **Click Submit**

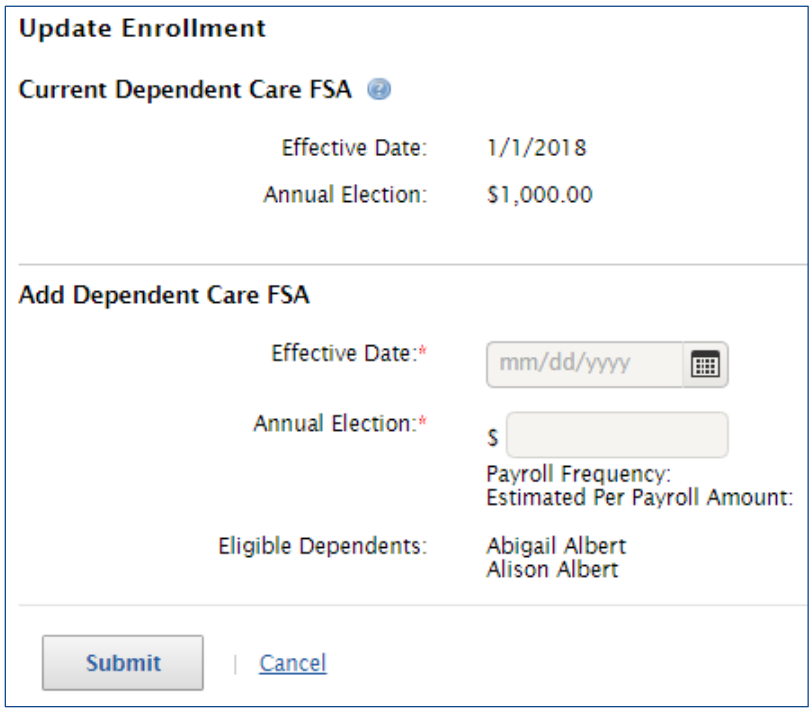


MEDICAL FSA EXAMPLE

- **Participant Effective Date** *(Qualifying Event Date)*
- **New Annual Election**
- **Click Submit**

Table of Contents

- **Update the plan enrollment** *(see Dependent Care FSA example below)*



DEPENDENT CARE FSA EXAMPLE

- **Participant Effective Date** *(Qualifying Event Date)*
- **New Annual Election**
- **Click Submit**

Table of Contents

The **Contributions tab** lists Employer and Employee Contributions for All Accounts

- **Payroll Deduction** is the estimated amount the employee will contribute to the account based on the number of paychecks during the Plan year. *Note: the actual amount the employer deducts from payroll is not computed within our system. This amount is an estimate only.*
- **Employer Contributions** lists the amount the employer has contributed to date *(based on Annual Contribution divided by the number of contributions that will be made during the Plan year)* of the total amount the employer will have contributed by the end of the Plan year. *Note: Medical FSA Accounts are prefunded, and the employees have access to the full Annual Election at the beginning of the Plan year.*

Addison Albert: Contributions

Employee Status: Active (8/31/2011)
SSN: xxx-xx-1645
Division: 001

Add New Enrollment

Profile | Dependents | Account Summary | Enrollments | **Contributions** | Claims | Payments | Status

Account type: Non-HSA ▾

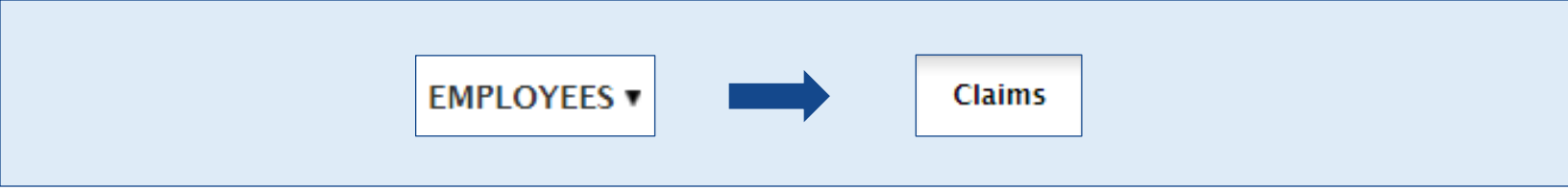
Account: All ▾ Contribution Type: All ▾ Status: All ▾ Search | Reset

Contributions Export

Date	Contribution Type	Account	Status	Amount
2/10/2017	Payroll Deduction	Dependent Care FSA 01/01/2017 - 12/31/2017	Posted	$38.46
1/27/2017	Payroll Deduction	Medical Flexible Spending Account 01/01/2017 - 12/31/2017	Posted	$76.92
1/27/2017	Payroll Deduction	Dependent Care FSA 01/01/2017 - 12/31/2017	Posted	$38.46
1/13/2017	Payroll Deduction	Medical Flexible Spending Account 01/01/2017 - 12/31/2017	Posted	$76.92
1/13/2017	Payroll Deduction	Dependent Care FSA 01/01/2017 - 12/31/2017	Posted	$38.46
1/1/2017	Employer Contribution	Health Reimbursement Arrangement 01/01/2017 - 12/31/2017	Posted	$1,500.00
12/30/2016	Payroll Deduction	Medical Flexible Spending Account 01/01/2016 - 12/31/2016	Posted	$36.96
12/16/2016	Payroll Deduction	Medical Flexible Spending Account 01/01/2016 - 12/31/2016	Posted	$37.04
12/2/2016	Payroll Deduction	Medical Flexible Spending Account 01/01/2016 - 12/31/2016	Posted	$37.04
11/18/2016	Payroll Deduction	Medical Flexible Spending Account 01/01/2016 - 12/31/2016	Posted	$37.04

< Prev ... 6 7 8 9 10 11 12 13 14 15 Next > | Page 11 of 15

Table of Contents



The **Claims tab** lists Claims for FSA and HRA Accounts, including the Claim Status.

The Claim Status will only display one status even if multiple statuses are more appropriate. View the Claim Amount and Details column for additional information.

Addison Albert: Claims

Employee Status: Active (8/31/2011)
SSN: xxx-xx-1645
Division: 001

Add New Enrollment

Profile | Dependents | Account Summary | Enrollments | Contributions | **Claims** | Payments | Status

Account: All
Submit Date Within: All
Method Filed: All
View | View All

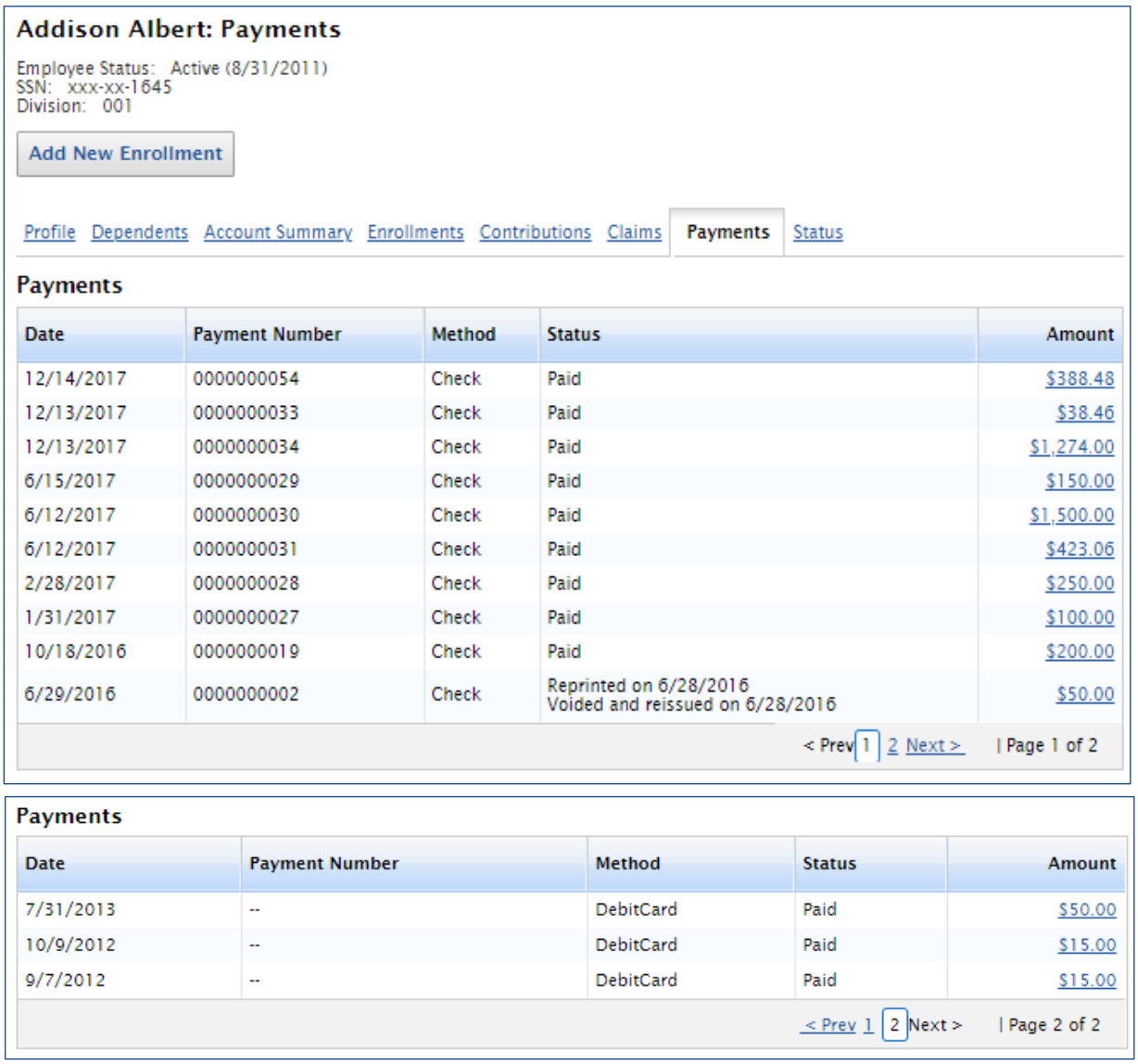
Claims

Date of Service	Claim Amount and Details	Account	Claim Status
12/9/2017	**$1,050.00 filed on 12/11/2017** Pending: $0.00 | Paid: $1,050.00 | Denied: $0.00 Filed via Participant portal | Receipt: Received	Medical Flexible Spending Account 1/1/2017 - 12/31/2017	Paid
12/1/2017	**$224.00 filed on 12/11/2017** Pending: $0.00 | Paid: $0.00 | Denied: $224.00 Filed via Participant portal | Receipt: New Needed	Medical Flexible Spending Account 1/1/2017 - 12/31/2017	Denied
5/9/2017	**$150.00 filed on 5/22/2017** Pending: $0.00 | Paid: $150.00 | Denied: $0.00 Filed via Participant portal | Receipt: Received	Medical Flexible Spending Account 1/1/2017 - 12/31/2017	Paid
2/15/2017	**$2,000.00 filed on 3/8/2017** Pending: $0.00 | Paid: $1,500.00 | Denied: $0.00 Filed via Claims link | Receipt: Received	Health Reimbursement Arrangement 1/1/2017 - 12/31/2017	Paid
2/1/2017 - 2/28/2017	**$850.00 filed on 2/27/2017** Pending: $0.00 | Paid: $850.00 | Denied: $0.00 Filed via Participant portal | Receipt: Received	Dependent Care FSA 1/1/2017 - 12/31/2017	Paid
11/14/2016	**$350.00 filed on 1/30/2017** Pending: $0.00 | Paid: $320.00 | Denied: $30.00 Filed via Participant portal | Receipt: Received	Medical Flexible Spending Account 1/1/2016 - 12/31/2016	Paid
1/18/2017	**$250.00 filed on 1/30/2017** Pending: $0.00 | Paid: $250.00 | Denied: $0.00 Filed via Participant portal | Receipt: Received	Medical Flexible Spending Account 1/1/2017 - 12/31/2017	Paid
7/6/2016	**$25.00 filed on 7/7/2016** Pending: $0.00 | Paid: $25.00 | Denied: $0.00 Filed via Claims link | Receipt: Received	Medical Flexible Spending Account 1/1/2016 - 12/31/2016	Paid
6/28/2016	**$25.00 filed on 6/29/2016** Pending: $0.00 | Paid: $25.00 | Denied: $0.00 Filed via Participant portal | Receipt: Received	Medical Flexible Spending Account 1/1/2016 - 12/31/2016	Paid
6/15/2016	**$1.40 filed on 6/28/2016** Pending: $0.00 | Paid: $0.00 | Denied: $1.40 Filed via Participant portal | Receipt: Received	Medical Flexible Spending Account 1/1/2016 - 12/31/2016	Denied

< Prev 1 2 3 Next > | Page 1 of 3

Table of Contents

The **Payments tab** lists debit card transactions, direct deposit reimbursements, and check reimbursements



Addison Albert: Payments

Employee Status: Active (8/31/2011)
SSN: xxx-xx-1645
Division: 001

Add New Enrollment

Profile | Dependents | Account Summary | Enrollments | Contributions | Claims | Payments | Status

Payments

Date	Payment Number	Method	Status	Amount
12/14/2017	0000000054	Check	Paid	$388.48
12/13/2017	0000000033	Check	Paid	$38.46
12/13/2017	0000000034	Check	Paid	$1,274.00
6/15/2017	0000000029	Check	Paid	$150.00
6/12/2017	0000000030	Check	Paid	$1,500.00
6/12/2017	0000000031	Check	Paid	$423.06
2/28/2017	0000000028	Check	Paid	$250.00
1/31/2017	0000000027	Check	Paid	$100.00
10/18/2016	0000000019	Check	Paid	$200.00
6/29/2016	0000000002	Check	Reprinted on 6/28/2016 Voided and reissued on 6/28/2016	$50.00

< Prev 1 2 Next > | Page 1 of 2

Payments

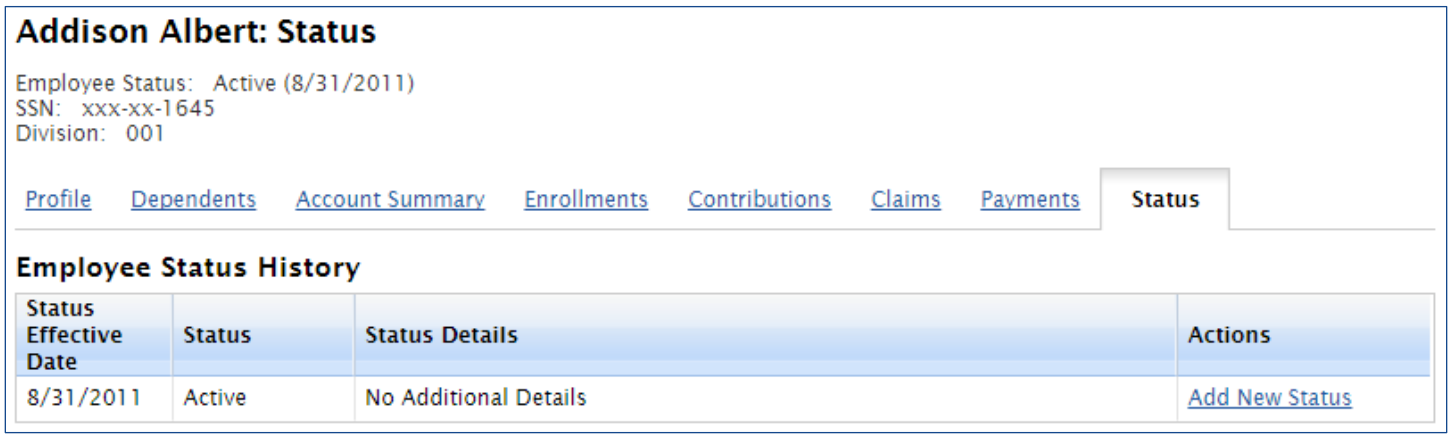
Date	Payment Number	Method	Status	Amount
7/31/2013	--	DebitCard	Paid	$50.00
10/9/2012	--	DebitCard	Paid	$15.00
9/7/2012	--	DebitCard	Paid	$15.00

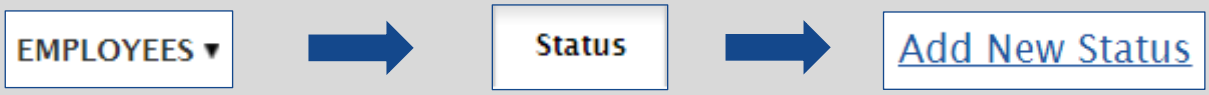
< Prev 1 2 Next > | Page 2 of 2

- Clicking on the **Amount** in the Amount column will cause a popup to display any Claims paid in whole or in part towards that specific Reimbursement

Table of Contents

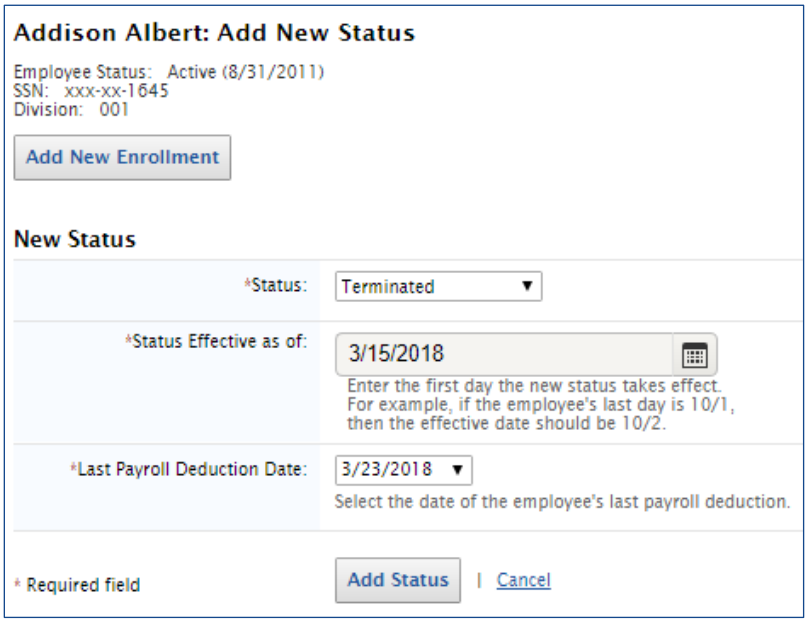
The **Status tab** lists the Employee Employment Status and Status Effective Date

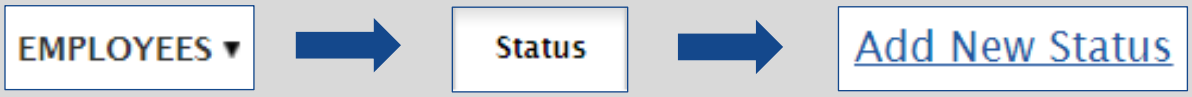




Change an Employee Status from Active to Terminated

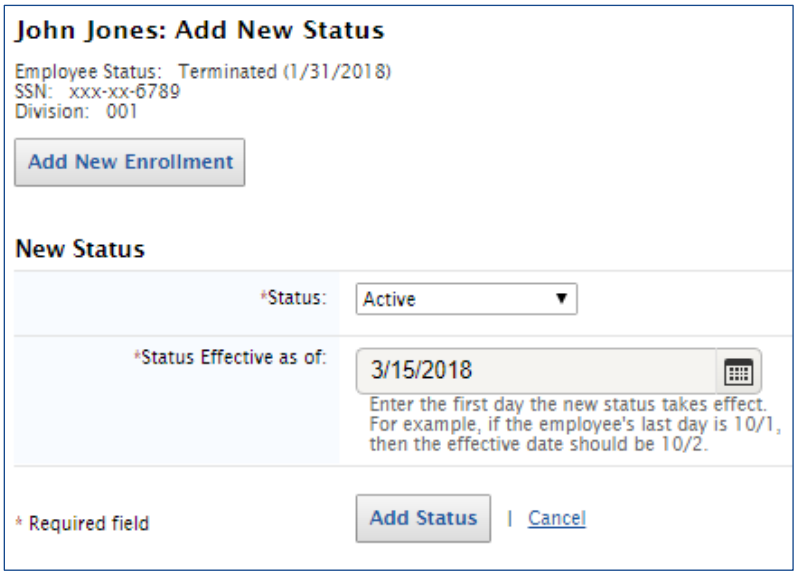
- **Search for the Employee from the Employees tab**
- **The Profile tab will be displayed**
- **Select the Status tab for this Participant**
- **Click Add New Status**
- **Change the Status to the New Status**
  Enter Terminated for Any Employee who should not receive reimbursements for dates of service after the Status Effective Date.
- **Enter the Status Effective Date**
  Enter the date after the status change; this ensures that expenses are payable through the last day that they are benefit eligible.
- **Enter the Last Payroll Deduction Date**
  This option wil only be available for FSA accounts
- **Click Add Status**





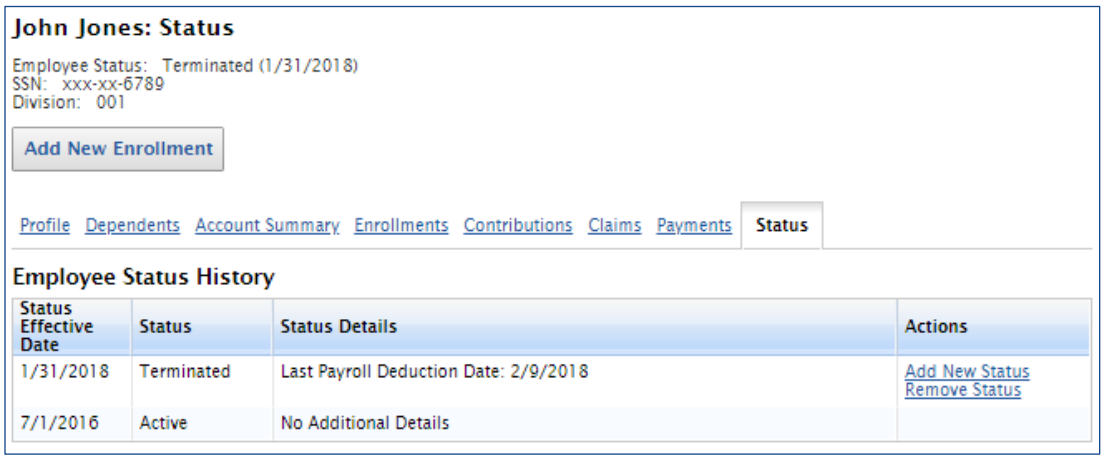
Change an Employee Status from Terminated to Active

- Search for the Employee from the Employees tab
- The Profile tab will be displayed
- Select the Status tab for this Participant
- Click Add New Status
- Change the Status to Active
- Enter the Status Effective Date *(Enter the date the employee is eligible for benefits)*
- Click Add Status



Remove an Incorrect Employee Status

- Search for the Employee from the Employees tab
- The Profile tab will be displayed
- Select the Status tab for this Participant
- Click Remove Status



- Click OK to the popup message

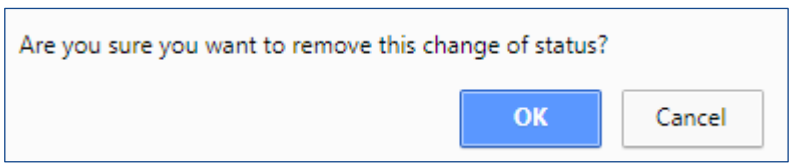


Table of Contents

PLANS

View a Brief Explanation of Plans. *Please Check your Employer Portal for the most current descriptions.*

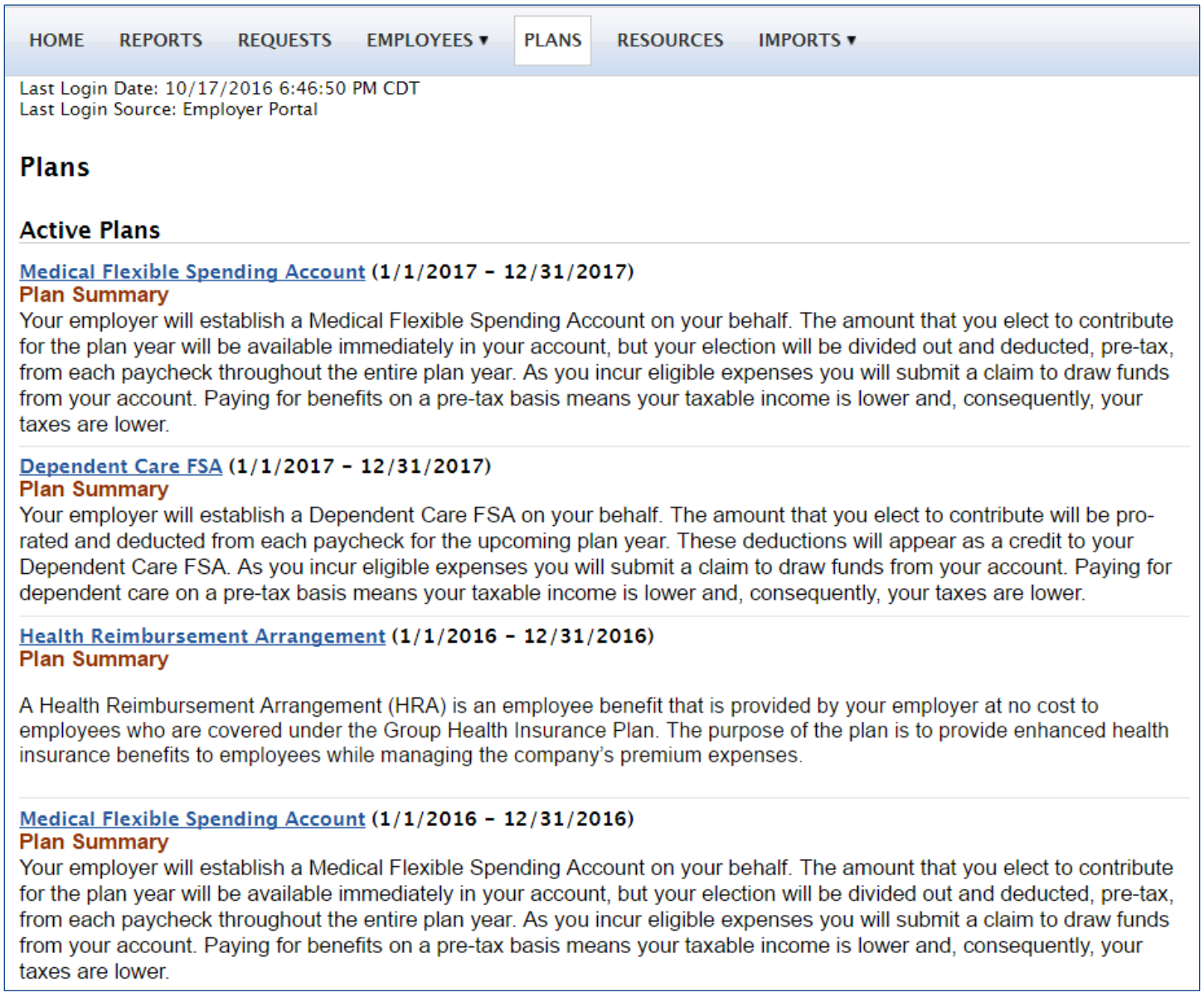
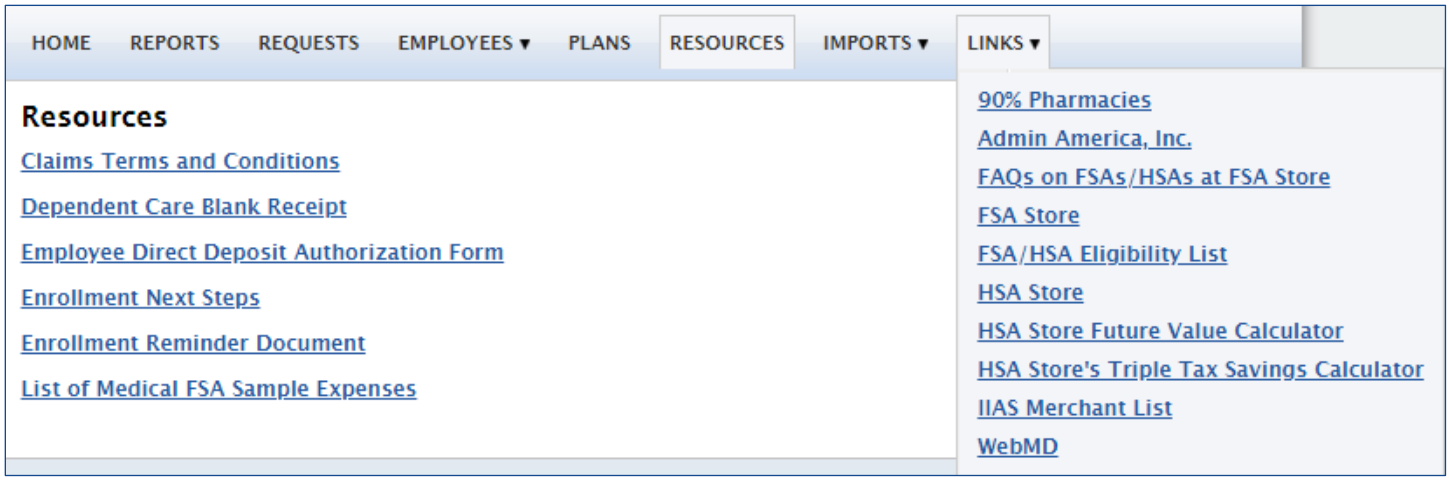


Table of Contents

RESOURCES & LINKS ▾

Click the Resources tab to view employee and employer forms and guides.
Forms may vary dependent on your lines of service with Admin America.

Hover over the Links tab to view resource links.



- **90% Pharmacies** is linked to a PDF of Merchants Registered Under IRS 90% Rule where at least 90% of sales are from prescriptions or other qualified over-the-counter products.
- **Admin America, Inc.** is linked to the Admin America website
- **FAQs on FSAs/HSAs at FSA Store** is linked to the FSAStore.com education center
- **FSA Store** is linked to the FSA Store website
- **FSA/HSA Eligibility List** is linked to the FSAStore.com FSA Eligible Products & Services list. Scroll down to the bottom of the screen to view the full alphabetized list
- **HSA Store** is linked to the HSA Store website
- **HSA Store Future Value Calculator** is linked to the HSA Store Calculator
- **HSA Store's Triple Tax Savings Calculator** is linked to the HSA Store Tax Calculator
- **IIAS Merchant List** is linked to a PDF of Merchants that have implemented the SIGIS IIAS Standard for benefit card transactions.
- **WebMD** is linked to the WebMD.com website

Table of Contents

IMPORTS ▾

The Import tab is used to enter participant demographic information, dependent demographic information, enrollment information, and HSA contributions into the Admin America system.

Demographic, Dependent, and Enrollment imports are processed internally by Admin America.

HSA Contribution imports are processed by the employer group or another designated third party. For the complete HSA Import Guide, Click Here

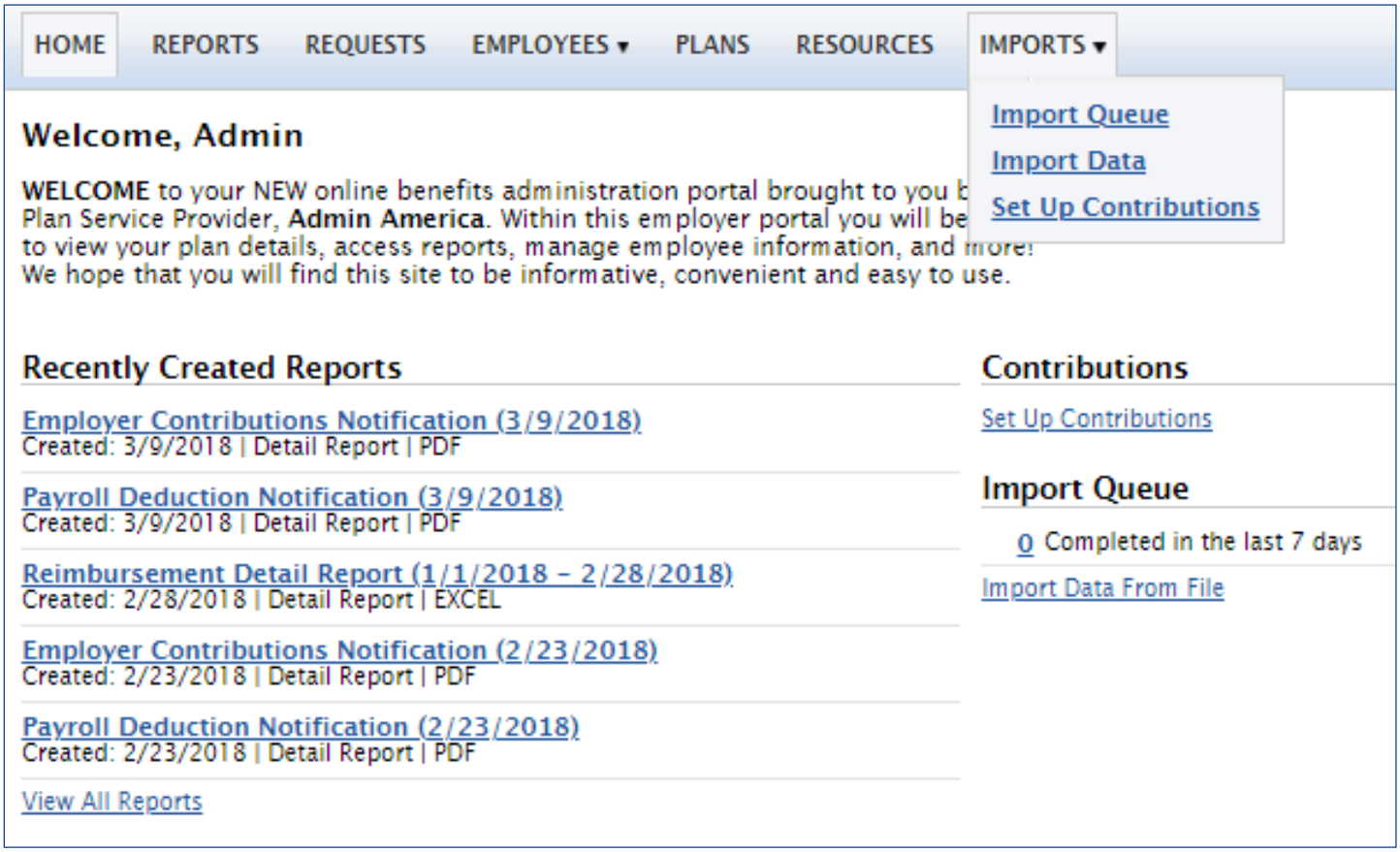
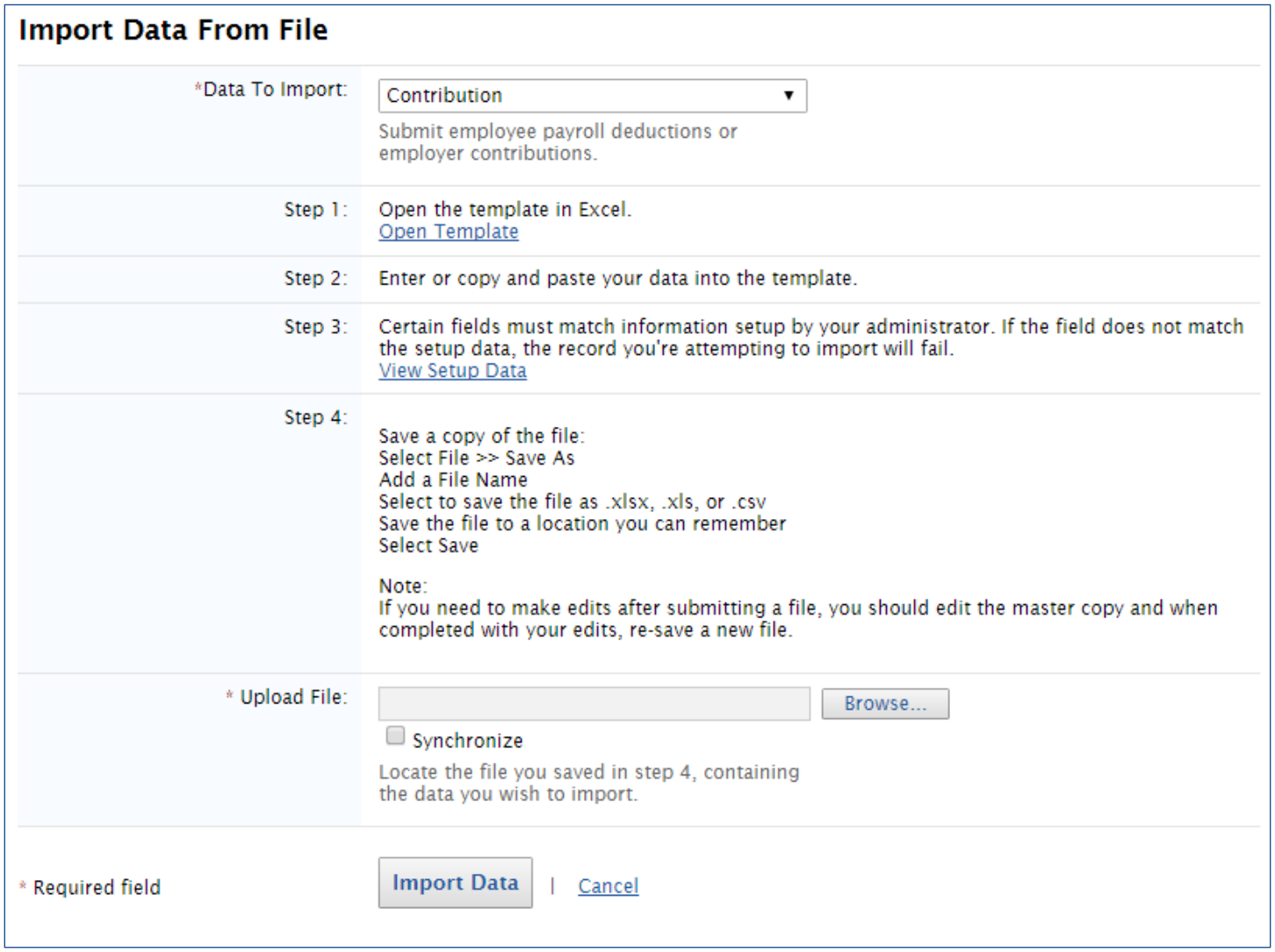


Table of Contents

Complete the below to import HSA contributions

For the complete HSA Import Guide, Click Here



- **Hover over the Import tab to view the dropdown options**
- **Click Import Data**
- **Select Contribution from the Data to Import dropdown**
- **Click Open the Template**

Table of Contents

Complete the below to import HSA contributions
For the complete HSA Import Guide, Click Here

- **Complete the Contribution Template** as shown below

	A	B	C	D	E
1	EmployeeIdentifier	ContributionDate	ContributionDescription	ContributionAmount	PlanName
2					
3					
4					
5					
6					

COLUMN A: EmployeeIdentifier

- The SSN of the employee. It must be in format XXXXXXXXX
- Dashes will cause the import to fail

COLUMN B: ContributionDate

- Enter the date 2 business days before you want the funds available in the HSA accounts.
  Note: the Contribution template must be imported at least two business days prior to when you want the funds available in the HSA accounts

COLUMN C: ContributionDescription

- This is a dropdown field. This field may be copied and pasted
- Select Payroll for Employee Contributions
- Select Employer for Employer Contributions (*If an employee has BOTH a Payroll Contribution and a Employer Contribution, s/he will have two separate lines on the Contribution Template (i.e. one for the Employer Contribution and one for the Payroll Contribution)*

COLUMN D: ContributionAmount

- Enter the Contribution amount in dollar amounts XX.XX

COLUMN E: PlanName

- Enter HSA (*HSA may auto-correct to HAS. Please see Remove HSA to HAS AutoCorrection Guide if you would like to remove this auto-correct from your system).*

Further Questions? Email employersupport@adminamerica.com or Call 770-992-5959

Table of Contents