



EMPLOYEE

Quickstart Guide



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Employee Portal Overview

Your Company offers a variety of benefits that are designed to make your life easier, provide you with great coverage that is affordable to you and support your goals for the future. To that end, we'd like to welcome you to the Online Employee Portal.

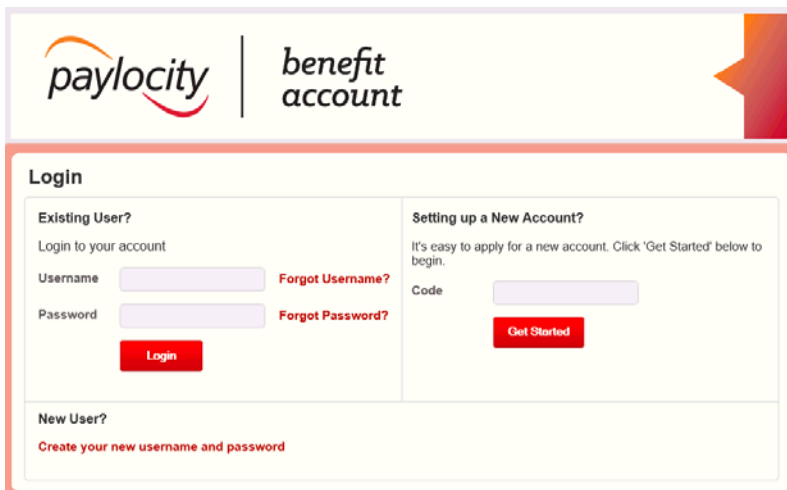
This one-stop portal allows you to manage your tax-favored accounts (Flexible Spending Account (FSAs), Health Reimbursement Arrangement (HRA), Health Savings Account (HSA), and Transportation Management Account (TMA) that includes Parking and/or Transit and gives you 24/7 access to view step-by-step instructions on how to:

- Change your login ID and/or password
- Benefit enrollment
- File a claim online
- Upload receipts and track expenses
- View account balance and activity
- View your claims history and payment (reimbursement) history
- Update your personal profile information
- Download plan information, forms and notifications
- Report a lost/stolen Benny Card and request a new one

Accessing the Employee Portal

Paylocity provides a secure portal through which all authorized users can gain access to their benefit information. This section provides step-by-step instructions for secure access and login to the Employee Portal.

1. Navigate to bat.paylocity.com
2. Enter your **Username** and **Password**
 - The Username is a combination of:
 - the user's first initial of their first name
 - the users entire last name
 - the last four digits of the users social security number (SSN)
 - the two letter abbreviation for the user's home stateExample: John Smith 000-00-1234 Illinois would be entered as jsmith1234il (not case sensitive)
 - The initial temporary password is "paylocity" (all lower case)
 - Users will be prompted to change the password upon initial login
3. Select **Login**



The screenshot shows the Paylocity benefit account login interface. At the top, the Paylocity logo is on the left and "benefit account" is on the right. Below the header is a "Login" section. It is divided into two columns. The left column is titled "Existing User?" and contains the text "Login to your account". It has two input fields: "Username" and "Password". To the right of each field is a link: "Forgot Username?" and "Forgot Password?". Below the "Password" field is a red "Login" button. The right column is titled "Setting up a New Account?" and contains the text "It's easy to apply for a new account. Click 'Get Started' below to begin." It has one input field: "Code". Below the "Code" field is a red "Get Started" button. At the bottom of the login section, there is a "New User?" section with the text "Create your new username and password".

Employee Portal Home Page

The Home Page is a dashboard which allows you to quickly and easily access and manage your account information.

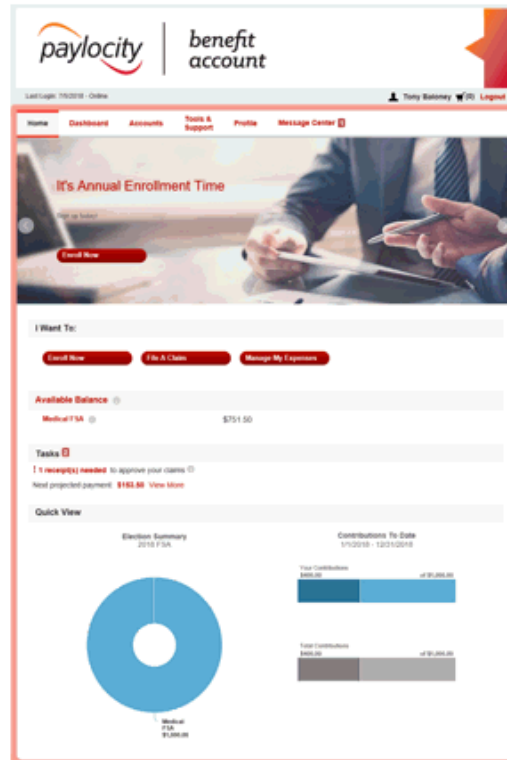
Easily access Available Balance, File A Claim, Manage Expenses, View Recent Transactions, Pending Tasks and more!

The **I Want To...** section contains the most frequently used features for the Employee Portal

Available Balance links to the Account Summary page where you can see and manage your accounts

The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts, e.g., receipt requests, Paylocity Benefit Card repayments, etc.

The **Quick View** graphically displays key account information



Update Login Information

1. From the **Home** page, select the **Profile** tab
2. Select **Login Information** from left-hand navigation bar
3. Select applicable link for needed change
4. Follow instructions on the screen
 - For new users, upon initial log in you will be prompted to change the password that was assigned by your plan administrator
 - Follow the instructions to complete the change
5. Select **Save**

The screenshot shows the Paylocity Benefit Account interface. At the top, the Paylocity logo is on the left and the 'benefit account' text is on the right. Below the logo, it says 'Last Login: 7/5/2018 - Online'. On the right side of the top bar, the user's name 'Tony Baloney' is displayed next to a shopping cart icon with '(0)' items and a 'Logout' link. A navigation menu below the top bar includes 'Home', 'Dashboard', 'Accounts', 'Tools & Support', 'Profile' (which is highlighted with a red underline), 'Message Center' with a notification icon, and 'I Want to...' with a dropdown arrow. On the left side of the main content area, there is a vertical navigation menu with 'Profile', 'Banking', 'Payment Method', and 'Login Information' (which is highlighted with a red background). The main content area is titled 'Login Information' and contains a table with the following items:

Password	Change Password
Username	Change Username
Security Questions	Change Security Questions

Updating Personal Profile

Review and update your personal profile summary details, dependent information, and beneficiaries.

1. From the **Home** page, navigate to the **Profile** tab
2. Select **Update Profile** link
3. Complete your changes as needed
4. Some profile changes will require you to answer an additional security question
5. Select **Submit** to save changes or **Cancel** to discard changes
6. Updates will appear on the Profile Summary screen

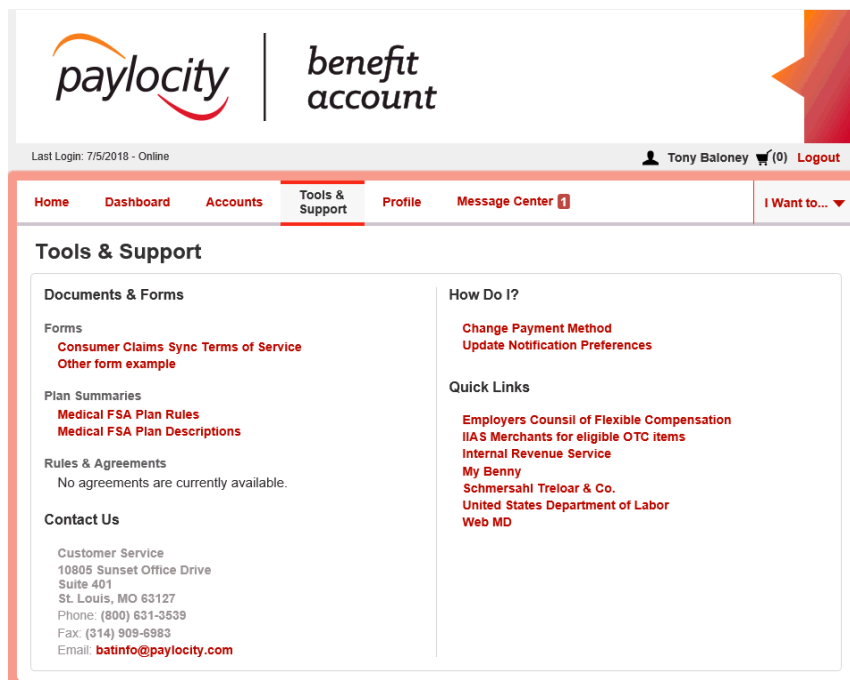
The screenshot shows the Paylocity benefit account interface. At the top left is the Paylocity logo, and to its right is the text "benefit account". Below the logo, it says "Last Login: 7/5/2018 - Online". On the top right, the user's name "Tony Baloney" is displayed with a shopping cart icon containing "(0)" and a "Logout" link. A navigation bar contains links for "Home", "Dashboard", "Accounts", "Tools & Support", "Profile" (which is highlighted), "Message Center 1", and "I Want to...". Below the navigation bar, the page title is "Profile / Profile Summary". On the left side, there are menu items: "Profile" (highlighted), "Banking", "Payment Method", and "Login Information". The main content area is divided into two columns. The left column is titled "Profile" and includes an "Update Profile" link. It lists the following information for Tony Baloney: Address (10805 Sunset Office Dr, Suite 401, St Louis, MO 63127, United States), Phone ((111) 111-1111), Email (tbaloney@tonyindustries.com), Gender (Male), Marital Status (Unspecified), and Participant Account ID (0004871461). The right column is titled "Dependents" and includes an "Add Dependent" link. It lists information for Loretta Baloney: Birth Date (6/4/1983) and Student status (No), with a "View / Update" link.

Sign-Up for Direct Deposit

The fastest way to get to be reimbursed for expenses is to enroll for direct deposit to a personal checking account. If your employer offers direct deposit, use the following step-by-step instructions to enroll.

1. From the **Home** page, navigate to the **Tools & Support** tab
2. Select **Change Payment Method** under the **How Do I?** section
3. Select **Banking/Cards** and then **Add Bank Account**
4. Select **Payment Method**. Go to the **Alternate Payment Method** and choose **Direct Deposit** and select **Submit**
5. Enter your bank account information
6. Select **Submit**
7. The **Payment Method Changed** confirmation displays

NOTE: If there is a bank validation requirement, you will be notified on the portal to look for a small transactions or "micro-deposit" in your designated bank account in the next couple days to enter online, which will validate your account.



The screenshot displays the Paylocity benefit account portal. At the top left, the logos for "paylocity" and "benefit account" are visible. Below the logos, the user's last login is shown as "7/5/2018 - Online" and the user name "Tony Baloney" with a shopping cart icon and "Logout" link. The navigation menu includes "Home", "Dashboard", "Accounts", "Tools & Support" (which is highlighted), "Profile", "Message Center", and "I Want to...". The "Tools & Support" section is divided into three columns: "Documents & Forms", "How Do I?", and "Quick Links".

Documents & Forms

- Forms
 - [Consumer Claims Sync Terms of Service](#)
 - [Other form example](#)
- Plan Summaries
 - [Medical FSA Plan Rules](#)
 - [Medical FSA Plan Descriptions](#)
- Rules & Agreements
 - No agreements are currently available.
- Contact Us
 - Customer Service
 - 10805 Sunset Office Drive
 - Suite 401
 - St. Louis, MO 63127
 - Phone: (800) 631-3539
 - Fax: (314) 909-6983
 - Email: batinfo@paylocity.com

How Do I?

- [Change Payment Method](#)
- [Update Notification Preferences](#)

Quick Links

- [Employers Council of Flexible Compensation](#)
- [IIAS Merchants for eligible OTC items](#)
- [Internal Revenue Service](#)
- [My Benny](#)
- [Schmersahl Treloar & Co.](#)
- [United States Department of Labor](#)
- [Web MD](#)

Report Missing and/or Request a New Paylocity Benefit Card

The Paylocity Benefit Card makes it easy to access the money you've set aside in your tax advantaged benefit account such as an FSA, HSA, TMA, and/or HRA. Simply use your card to pay for qualified expenses at any IIAS Merchant. The amount of your purchase will be automatically deducted from your account using your pretax dollars and electronically transferred to the merchant for payment. Note: The Paylocity Benefit Card is not available for all plans. Check with your employer for specific details regarding your account.

1. From the **Home** page, navigate to the **Profile** tab
2. Select **Banking** link from left-hand navigational section
3. Under the **Debit Card** column, select **Report Lost/Stolen** or **Order Replacement**
4. Complete the online instructions
5. Click **Submit**

Filing Claims and Uploading Receipts

Claim filing made easy with the Paylocity claim filing wizard! The wizard simply walks users through their claim submission including entry of information, payee details and uploading itemized bills/receipts.

1. On the **Home** page, select **File a Claim** OR from any page on the portal expand the **I Want To...** section on the top right-hand side of the screen
2. Using the **Pay From** dropdown, select the account from which you would like to receive reimbursement
3. Using the **Pay To** dropdown, select a payee and then click **Next**
4. Select the **Upload Valid Documentation** to upload required receipt. Additional receipts can be added to the claim by clicking on the **Add Another Receipt** link
5. Select **Next** to enter the remaining **Claim Details**
6. Once the information has been added, click **Next** and your claim will be added to the **Claims Basket** on upper right-hand of page
7. To add more than one claim, select **Add Another**
8. Once all claims have been entered, select **Submit** to send the claims for processing
NOTE: Your claim must be submitted prior to logging out of the portal. Once you log out, the claims being held in the Claims Basket will be deleted.
9. Print the **Claim Confirmation Form** for your records
10. If you see a **Receipts Needed** link in the Tasks section of your Home page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page. Simply click to expand the line item to view claim details and **Upload Receipts** link.



- Home
- Dashboard
- Accounts
- Tools & Support
- Profile
- Message Center 1



I Want To:

- Enroll Now
- File A Claim
- Manage My Expenses

Available Balance 1

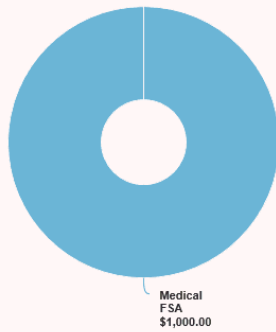
Medical FSA 1 \$751.50

Tasks 2

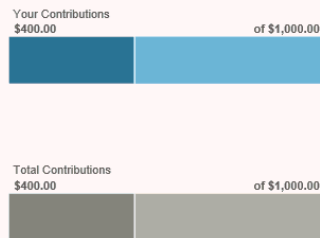
! 1 receipt(s) needed to approve your claims 1
Next projected payment: \$153.50 View More

Quick View

Election Summary
2018 FSA



Contributions To Date
1/1/2018 - 12/31/2018



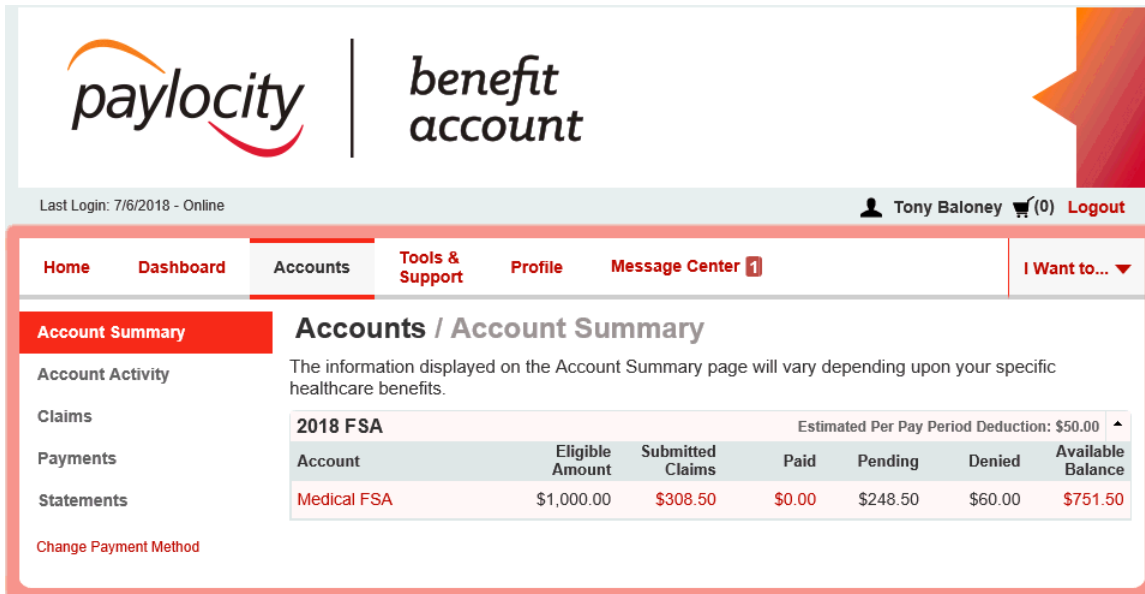
View Account Balance and Activity

For Account Balance Only:

1. On the **Home** page, navigate to the **Available Balance** section

For Account Activity:

1. Select the **Available Balance** link on the **Home** page to be redirected to the **Account Summary** page
2. Select a dollar amount to display more details



The screenshot displays the Paylocity benefit account interface. At the top, the Paylocity logo and "benefit account" text are visible. Below the header, the user's name "Tony Baloney" and a shopping cart icon with "(0)" are shown, along with a "Logout" link. The navigation menu includes "Home", "Dashboard", "Accounts", "Tools & Support", "Profile", "Message Center", and "I Want to...". The "Accounts" menu item is selected, leading to the "Account Summary" page. The page title is "Accounts / Account Summary". A message states: "The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits." Below this, there is a section for "2018 FSA" with an "Estimated Per Pay Period Deduction: \$50.00". A table displays the account details for "Medical FSA":

Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
Medical FSA	\$1,000.00	\$308.50	\$0.00	\$248.50	\$60.00	\$751.50

Additional links on the page include "Account Activity", "Claims", "Payments", "Statements", and "Change Payment Method".

Track Expenses

On the **Dashboard** tab, you can easily view healthcare expenses for ongoing management of medical claims, premiums, and card transactions.

1. Filter expenses by selecting the **filter options** on the navigation pane on the left side of the screen or by clicking on the **field headers** within the Dashboard
2. Search for specific expenses using the **Search** field at the bottom left of the screen

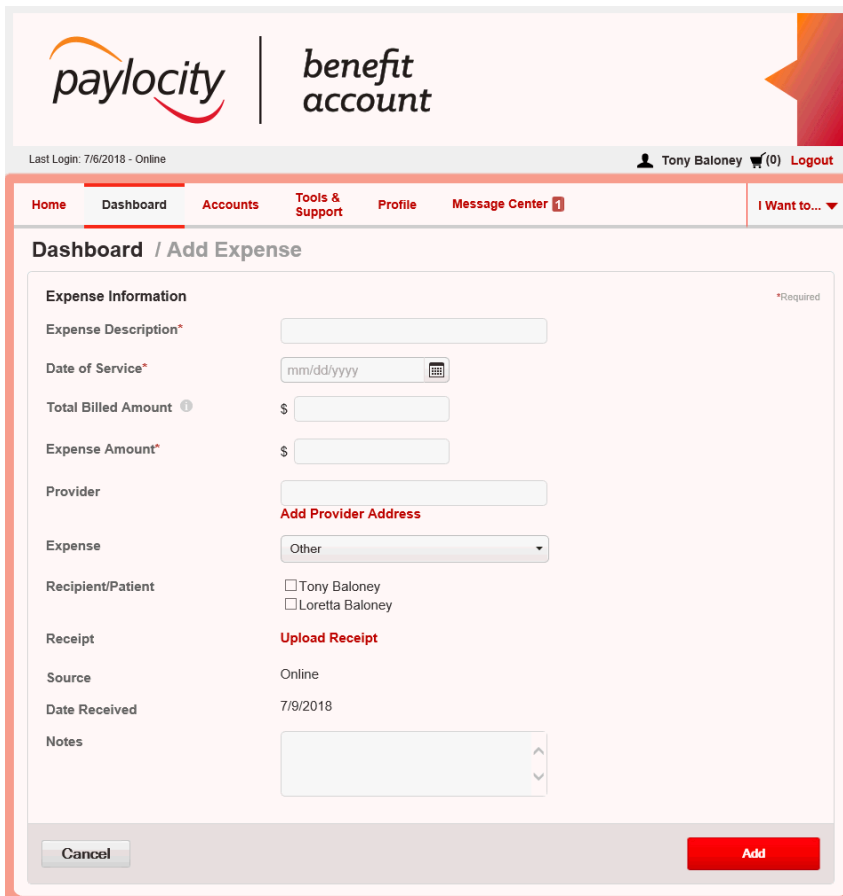
The screenshot displays the Paylocity Benefit Account Dashboard. At the top, the Paylocity logo and 'benefit account' are visible. Below the header, there's a navigation menu with options like Home, Dashboard, Accounts, Tools & Support, Profile, and Message Center. The main content area is titled 'Dashboard' and features an 'Expense Summary' section with three columns: Total Expenses (\$358.50), Total Paid Expenses (\$0.00), and Total Unpaid Expenses (\$358.50). Below this, a 'Total Eligible to Submit' section shows \$60.00. The core of the dashboard is a table listing individual expenses with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status. The table contains 10 rows of data, including entries for 'Other', 'Medical', and 'Pharmacy' expenses. A left-hand navigation pane offers filters for Category, Status, Year, Recipient, and Merchant/Provider. At the bottom left, there is a search field with a 'Search' button.

Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status
6/8/2018	Other	Undefined	Osco	\$10.00	Pay
6/7/2018	Medical	Tony Stark	Dr. Strange	\$15.00	Pay
6/6/2018	Pharmacy	Tony Baloney	-	\$10.00	Pay
6/5/2018	Pharmacy	Tony Stark	Osco	\$20.00	Pay
6/5/2018	Pharmacy	Tony Stark	Osco	\$20.00	Pay
6/5/2018	Pharmacy	Tony Stark	Osco	\$30.00	Pay
6/4/2018	Medical	Tony Baloney	-	\$30.00	Pay
6/4/2018	Pharmacy	Tony Stark	Osco	\$10.00	Pay
6/1/2018	Pharmacy	Tony Stark	Osco	\$15.00	Pay
4/1/2018	Unspecified	Tony Stark	Dr. Strange	\$45.00	Pay
2/28/2018	Unspecified	Tony Stark	Dr. Strange	\$153.50	Pay

Add an Expense to the Dashboard

1. Navigate to the **Dashboard** tab
2. Select **Add Expense** in the upper left side of the page
3. Complete the expense information fields. You can also upload a copy of the receipt and add notes for your records
4. Once the expense has been added to the **Dashboard**, you will have the option to pay the expense

NOTE: Adding an expense to the **Dashboard** will not generate a reimbursement until you opt to pay it. See **Pay an Expense from the Dashboard** for further details.



The screenshot displays the Paylocity benefit account dashboard. At the top, the Paylocity logo and 'benefit account' text are visible. Below the header, the user's name 'Tony Baloney' and a 'Logout' link are shown. The main navigation bar includes 'Home', 'Dashboard', 'Accounts', 'Tools & Support', 'Profile', and 'Message Center'. The 'Dashboard' tab is selected, and the 'Add Expense' form is displayed. The form contains the following fields:

- Expense Information** (Required):
 - Expense Description* (text input)
 - Date of Service* (calendar icon, format mm/dd/yyyy)
 - Total Billed Amount (text input, \$)
 - Expense Amount* (text input, \$)
 - Provider (text input, with 'Add Provider Address' link)
 - Expense (dropdown menu, currently 'Other')
 - Recipient/Patient (checkboxes for Tony Baloney and Loretta Baloney)
 - Receipt (text input, with 'Upload Receipt' link)
 - Source (text input, currently 'Online')
 - Date Received (text input, currently '7/9/2018')
 - Notes (text area)

At the bottom of the form, there are 'Cancel' and 'Add' buttons.

Pay an Expense from the Dashboard

Process payments and reimbursements for unpaid expenses directly from the Dashboard page.

1. Navigate to the **Dashboard** tab
2. Expenses will be categorized and payments can be initiated for unpaid expenses by selecting the **Pay** button to the right of the expense details
3. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment
4. When you click **Pay**, the claim details from the Dashboard will be pre-populated within the claim form
5. Review and edit the claim details as needed and then **Submit** for processing



Last Login: 7/6/2018 - Online

Tony Baloney (0) Logout

Home Dashboard Accounts Tools & Support Profile Message Center I Want to...

Add Expense

Export Expenses

Expenses Reset Filters

Category

All Categories

Pharmacy

Medical

More Options

Status

All Statuses

Unpaid

Ineligible

Pending

Year

All Years

2018

Recipient

All Recipients

Tony Baloney

Tony Stark

More Options

Merchant/Provider

All Merchants/Providers

Osco

Dr. Strange

More Options

Search

Description

Clear Search

Search

Dashboard

Expense Summary	Total Expenses	Total Paid Expenses	Total Unpaid Expenses
	\$368.50	\$0.00	\$368.50

Total Eligible to Submit: \$50.00

Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status
6/8/2018	Other	Undefined	Osco	\$10.00	Pay
6/7/2018	Medical	Tony Stark	Dr Strange	\$15.00	
6/6/2018	Pharmacy	Tony Baloney	-	\$10.00	Pay
6/5/2018	Pharmacy	Tony Stark	Osco	\$20.00	
6/5/2018	Pharmacy	Tony Stark	Osco	\$20.00	
6/5/2018	Pharmacy	Tony Stark	Osco	\$30.00	
6/4/2018	Medical	Tony Baloney	-	\$30.00	Pay
6/4/2018	Pharmacy	Tony Stark	Osco	\$10.00	
6/1/2018	Pharmacy	Tony Stark	Osco	\$15.00	
4/1/2018	Unspecified	Tony Stark	Dr. Strange	\$45.00	
2/28/2018	Unspecified	Tony Stark	Dr. Strange	\$153.50	

View Payment History

View reimbursement payments made to date, including debit card transactions.

1. Navigate to the **Accounts** tab
2. Select **Payments** from the left hand side of the screen and reimbursement payments made to date including debit card transactions will display. Apply filters from the left-hand side of the screen to filter by **Method, Status** and **Date**
3. Click on the line of the claim payment to expand the data to display additional details about the transaction

The screenshot shows the Paylocity benefit account interface. At the top, the Paylocity logo and "benefit account" are displayed. Below the header, the user's name "Tony Baloney" and a shopping cart icon with "(0)" are visible, along with a "Logout" button. The navigation menu includes "Home", "Dashboard", "Accounts" (selected), "Tools & Support", "Profile", "Message Center" (with a notification icon), and "I Want to...".

The main content area is titled "Accounts / Payments". On the left, there is a sidebar with "Account Summary", "Account Activity", "Claims", "Payments" (selected), and "Statements". Under "Payments", there are filter options for "Method" (All Methods, Direct Deposit, Check), "Status" (All Statuses, Paid), and "Date" (All Dates, 2018). A "Reset Filters" button is also present.

The main table displays the following payment history:

Date	Number	Method	Status	Amount
06/11/2018	0000000007	Direct Deposit	Paid	\$15.00
05/18/2018	0002139049	Check	Paid	\$45.00



Access Plan Information

1. Navigate to the **Accounts** tab
 - Click on the **Account Summary** tab from the left side navigation pane
2. Select the applicable **Account** name to open the **Plan Rules**, including Filing Rules, Debit Card Rules and Claim Summary if applicable
3. **OR** from the **Home** page, under the **Tools & Support** tab, you may view **Plan Summaries** for basic information.
4. Select each applicable plan to see plan details

The screenshot shows the Paylocity benefit account interface. At the top, there are logos for 'paylocity' and 'benefit account'. Below the logos, the user's name 'Tony Baloney' and a shopping cart icon with '(0)' are visible, along with a 'Logout' button. A navigation bar contains links for 'Home', 'Dashboard', 'Accounts', 'Tools & Support', 'Profile', and 'Message Center'. The 'Accounts' tab is selected, and the 'Account Summary' sub-tab is active. The main content area displays 'Accounts / Account Summary' and a table for '2018 FSA' with columns for 'Account', 'Eligible Amount', 'Submitted Claims', 'Paid', 'Pending', 'Denied', and 'Available Balance'. A 'Medical FSA' row is shown with values: \$1,000.00, \$308.50, \$0.00, \$248.50, \$60.00, and \$751.50. An 'Estimated Per Pay Period Deduction: \$50.00' is also noted.

2018 FSA							Estimated Per Pay Period Deduction: \$50.00
Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance	
Medical FSA	\$1,000.00	\$308.50	\$0.00	\$248.50	\$60.00	\$751.50	

Mobile

Manage your benefits anywhere, 24/7 with our mobile app. Convenient, real-time access to all your benefit accounts makes it easy to view recent account activity along with the ability to:

- Submit Claims
- Check Account Balances
- Track Healthcare Expenses
- Upload Pictures of Receipts
- Receive Text Alerts
- View Message Center
- Access Eligible Expense Scanner
- Accept HSA Custodial Agreements
- Complete HSA Transactions
- View HSA Investments

Available for all iPhones, iPads, and Android devices. Download at iTunes or Google Play.