THE HARRISON GROUP, INC.

EMPLOYER PORTAL GUIDE

WELCOME TO THE HARRISON GROUP'S EMPLOYER PORTAL

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

The Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Add, update and enroll employees
- Add and manage recurring contributions
- Retrieve over 50 scheduled reports or notifications
- Access history of reports and notifications
- View current and prior year plan information
- Access forms and documents
- Load data import files
- Submit service requests

THE HARRISON GROUP, INC.

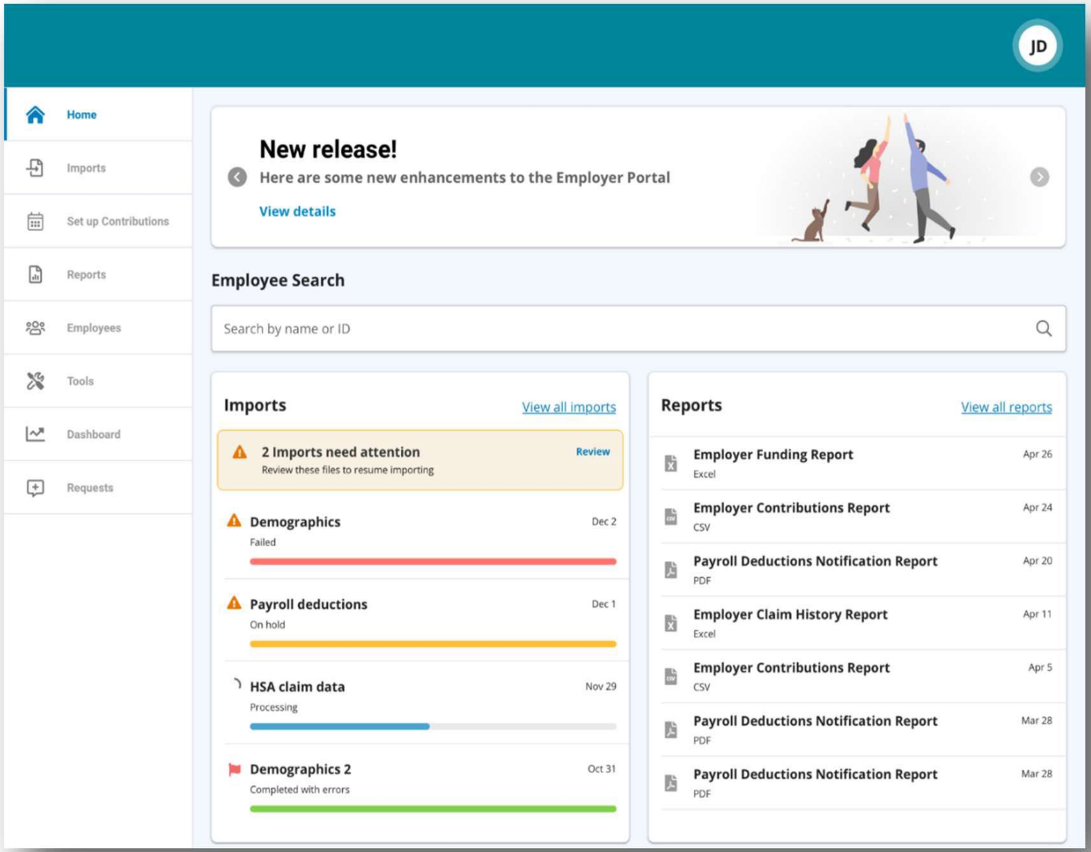
THE HARRISON GROUP, INC.

EMPLOYER PORTAL GUIDE

ACCESSING THE EMPLOYER PORTAL

HOW DO I GET ACCESS TO THIS PORTAL?

1. You and your assigned contacts will be sent a username and a temporary password.
2. Upon first login, you will be prompted to change the password.
3. Once password is updated and confirmed, click Login



The Home Page is easy to navigate:

Once logged in, everything you need to efficiently and effectively manage your Consumer Driven Healthcare (CDH) Accounts is found on the home page. From the home page, you can:

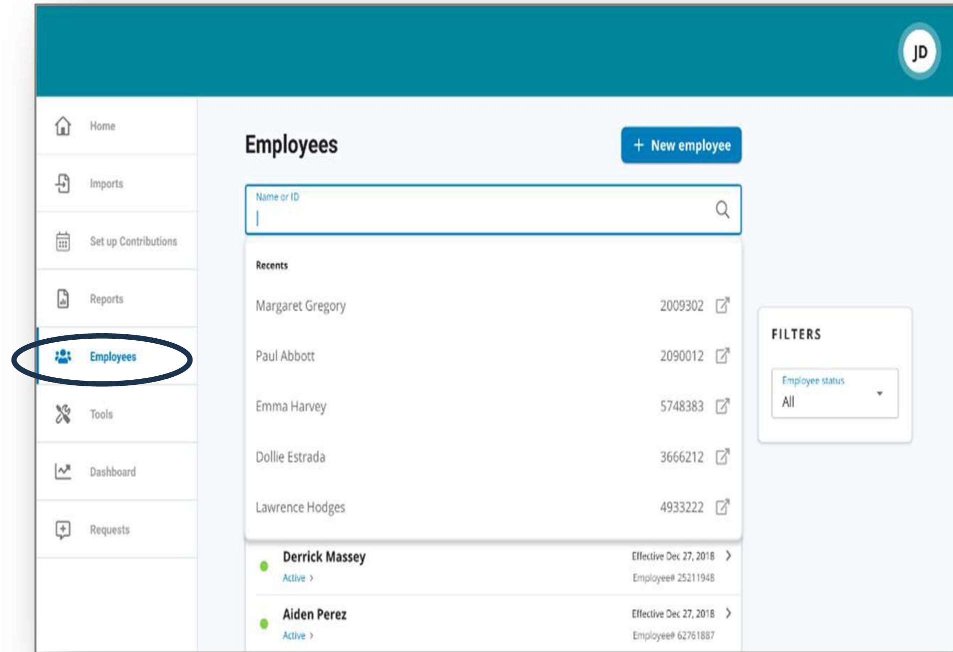
- Check on status of data import files
- Set up recurring contributions
- View employee-level data
- Review recent reports
- Log service requests

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

VIEWING EMPLOYEE DATA

WHAT KIND OF EMPLOYEE-LEVEL DATA CAN I ACCESS?

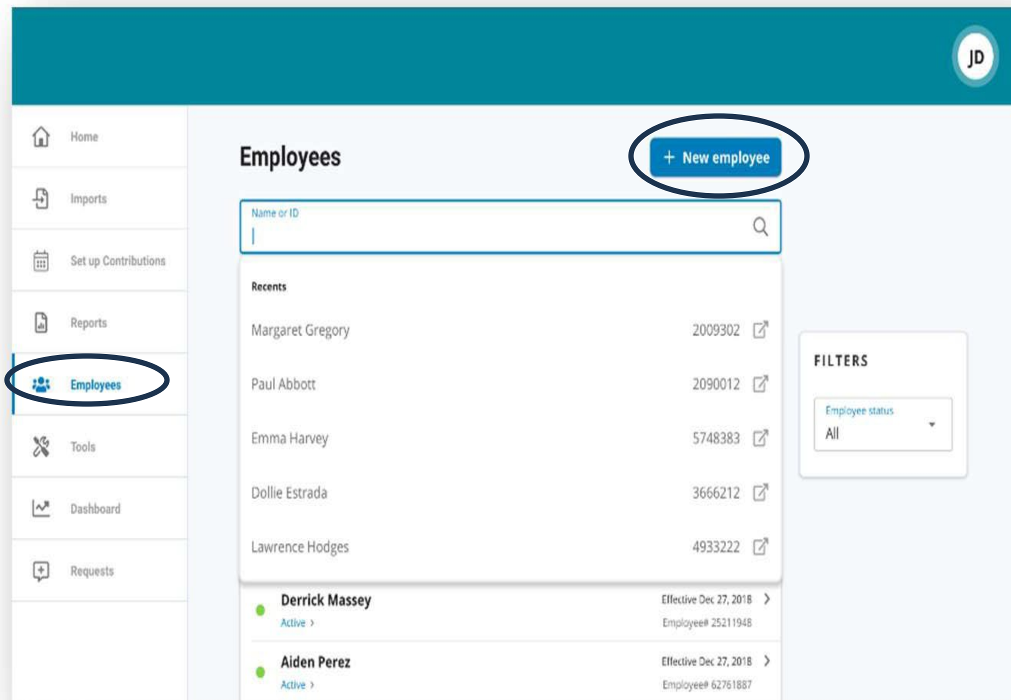
1. Select the **Employees** tab, you can get real-time data on all employees.
2. You can search for employees using their first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access the following information:
   a. Summary
   b. Enrollments
   d. Activity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



ADDS, ENROLL, AND UPDATES

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

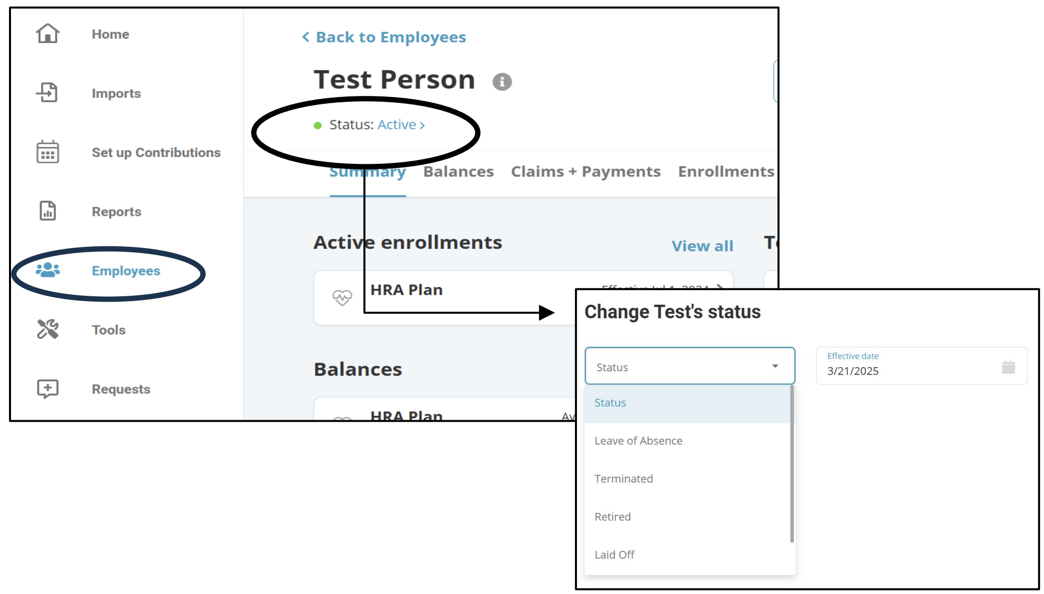
1. Under the **Employees** Tab.
2. Click the **New Employee** button.
3. Enter the Personal and Employment Information.
4. Click **Add New Employee**.
5. Select the **Enrollments** link.
6. Click **New Enrollment.**
7. Select the Plan Year and click **Next**.
8. Select one or more of the plans listed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



TERMING EMPLOYEES, ADDING PORTAL USERS, OTHER CHANGES

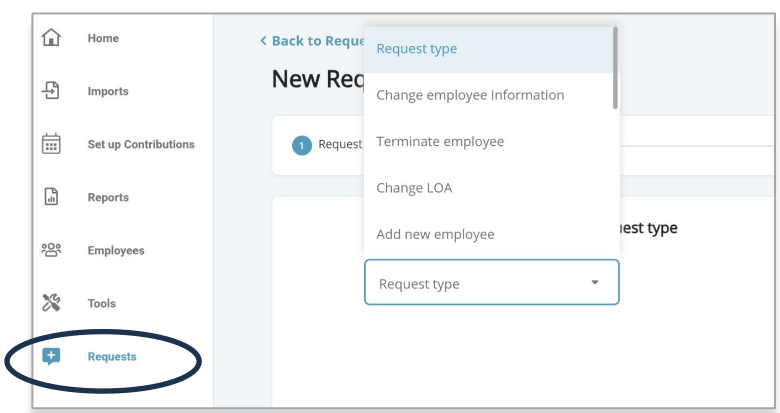
HOW DO I TERM, RETIRE OR STATUS AN EMPLOYEE ON A LOA?

1. Select the **Employees** tab.
2. Search and select the employee using first name, last name, or employee identifier (Employee ID or SSN).
3. Select your option from the **Status** field below the employee's name.
4. Enter the status **Effective Date.**
5. Click **Show Status History**.
6. Click **Add**.



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

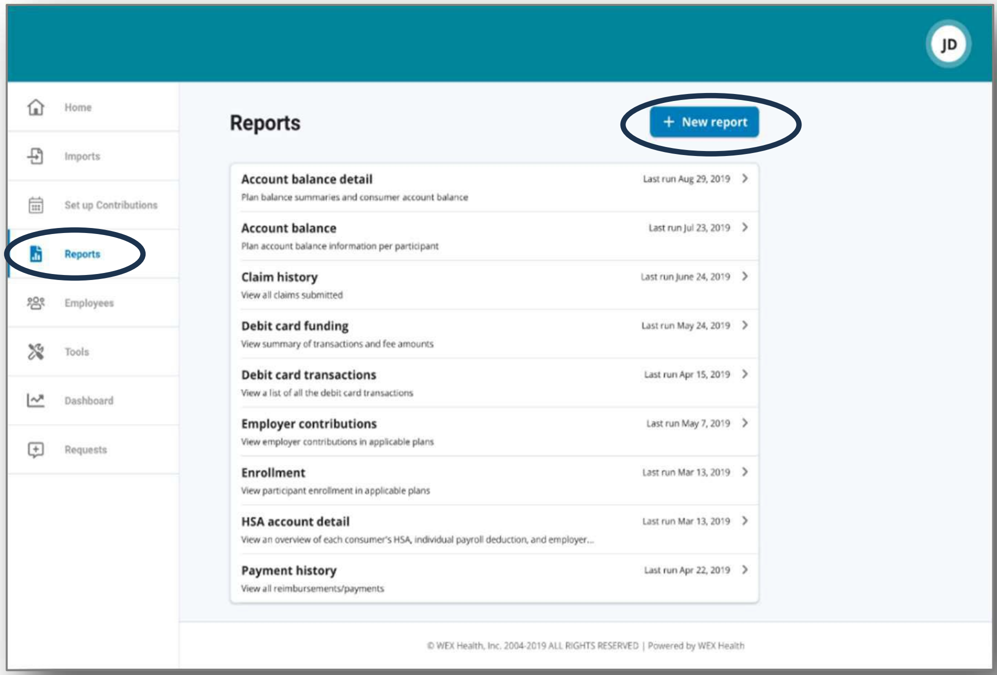
1. Select the **Requests** tab.
2. Under Request Type, there is a drop-down menu with over 10 options to choose from.
3. Choose the request type, i.e. add a new employee, add employer contact or change payroll deductions, then select a consumer from a list of employees, enter the request details and/or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



VIEWING AND RUNNING REPORTS

HOW DO I VIEW REPORTS AND NOTIFICATIONS?

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



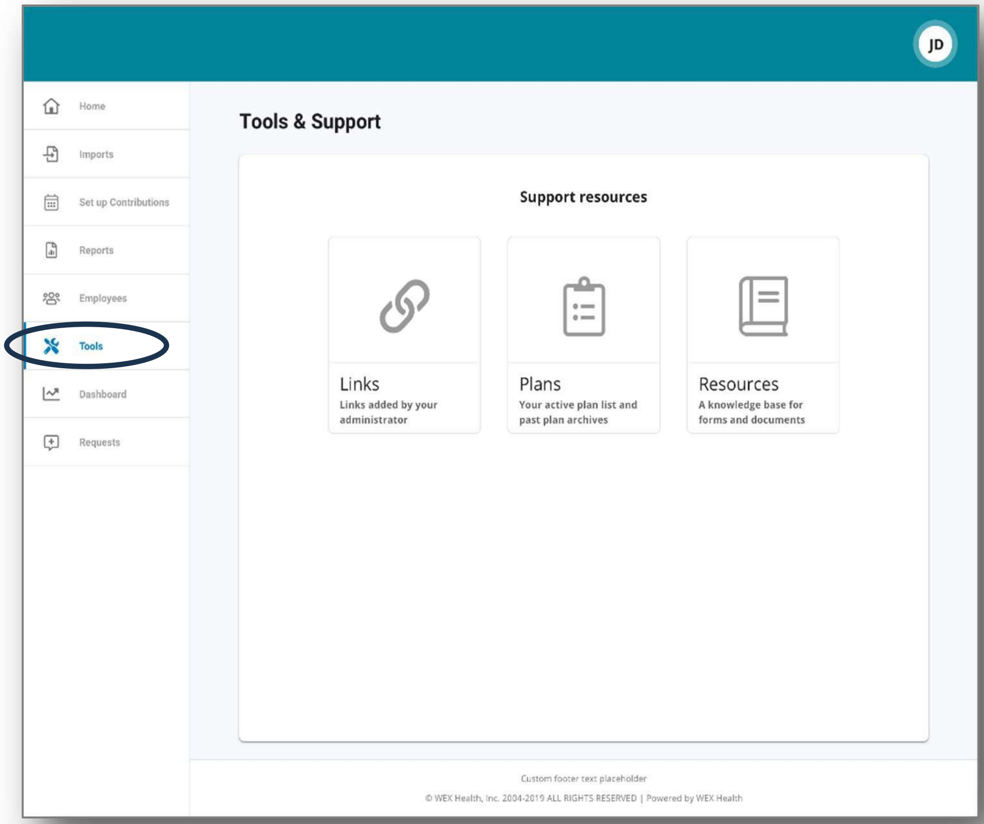
WILL I BE ABLE TO RUN MY OWN REPORTS IF NEEDED?

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

ACCESSING PLAN INFORMATION AND FORMS

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

1. Under the **Tools** tab, click on the **Plans** tile and you will find options to view plan info as the employees for all active and inactive plans.
2. You will also find additional support resources available including:
   - Links – Links to participant educational resources, eligible expense listing, privacy notices
   - Plans – Details on current and previous plan summaries and rules
   - Resources – Relevant forms including HIPAA Authorization and other resource information



WHERE WOULD I ACCESS REQUIRED FORMS?

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