



KNOWLEDGEABLE INNOVATIVE ESTABLISHED

## Online Account Access

Flex-Plan Services provides online account access for both participants and employer contacts as a standard service. Our online account access is not just a read-only access, but gives employer contacts and participants the ability to empower themselves by managing their accounts online.

Online account access is set up for employer contacts and participants as part of the plan implementation and enrollment processes. Individuals choose the appropriate portal through the flex-plan.com Web site and complete a verification process to verify their enrollment. Once verified, individuals have easy access to plan information, documents and online functionalities.

### The Employer Portal

Employer contacts have access to plan information through a special employer portal. Once logged in, personnel have access to all the pertinent plan information and the tools to actively administer the plan online. The following screenshots show the functionality contained within the employer portal.

#### Access participant data



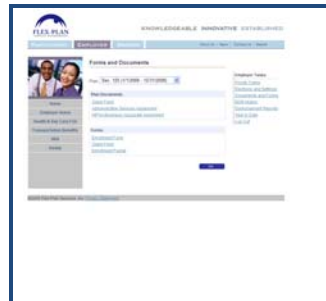
Click thumbnail for larger image

#### Add new participants



Click thumbnail for larger image

#### Access forms and documents



Click thumbnail for larger image

### Demo Access

Want to access the employer portal for yourself? The following credentials can be used by your staff to access the employer portal and see the functionality first-hand. Feel free to make changes to the participant accounts, run reports and access forms. Use the following link to access the employer portal logon screen.

[Access Employer Portal](#)

**Employer Portal Credentials**

<u>Username</u>	<u>Password</u>
joeblow	joeblow
janedoe	janedoe
john DOE	john DOE

## The Participant Portal

Plan participants have access to their online account through the participant portal where they can update their personal information, view claims history, balances and access plan forms and documents. During open enrollment, participants can enroll for the new plan year through their online account.

### Update personal information



*Click thumbnail for larger image*

### View claims and account balance



*Click thumbnail for larger image*

### Online enrollment



*Click thumbnail for larger image*

## Demo Access

Want to access the participant portal for yourself? Use the following credentials to get the online participant experience. Feel free to make changes to the participant's address or test-drive the online enrollment system. Use the following link to access the employer portal logon screen.

[Access Participant Portal](#)

### Participant Portal Credentials

<u>Username</u>	<u>Password</u>
brucebanner	brucebanner
clarkkent	clarkkent
brucewayne	brucewayne
peterparker	peterparker

## General Web Site Tools

Visitors to the Flex-Plan Web site can still have access to valuable tools and content without being a plan participant or client. Some of the features available to general visitors include:

- TAX SAVINGS CALCULATOR
- LIST OF ELIGIBLE EXPENSES
- FSA EXPENSE WORKSHEETS
- ONLINE QUOTING
- BENEFIT EXPLANATIONS
- LIBRARY OF IRS REGULATIONS
- IRS PUBLICATION AND FORMS
- REGULATION ANNOUNCEMENTS

For more information regarding our services or to schedule a demo of our Web site, please contact the sales department at (800) 669-3539 or email us at [sales@flex-plan.com](mailto:sales@flex-plan.com).

VISIT US ON THE WEB  
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