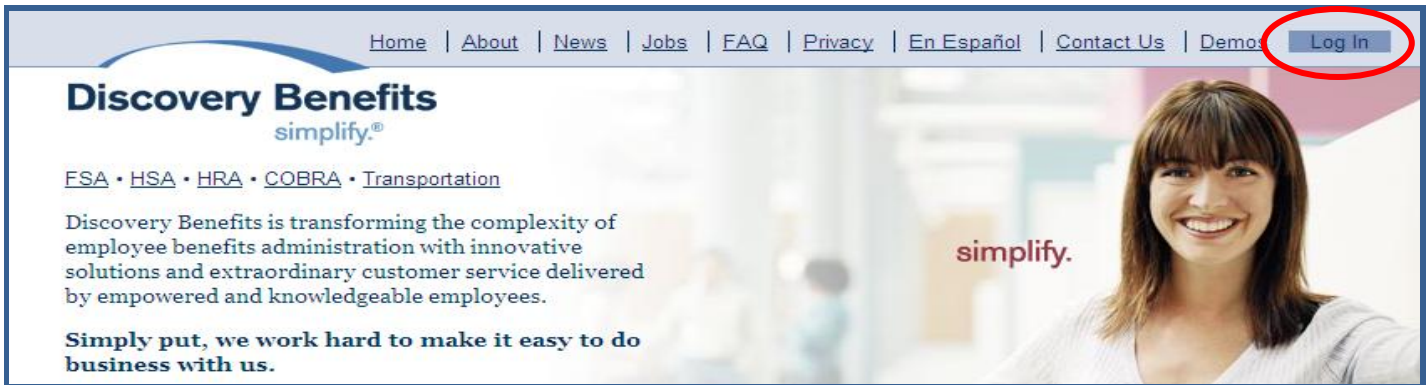




Employer Portal Guide

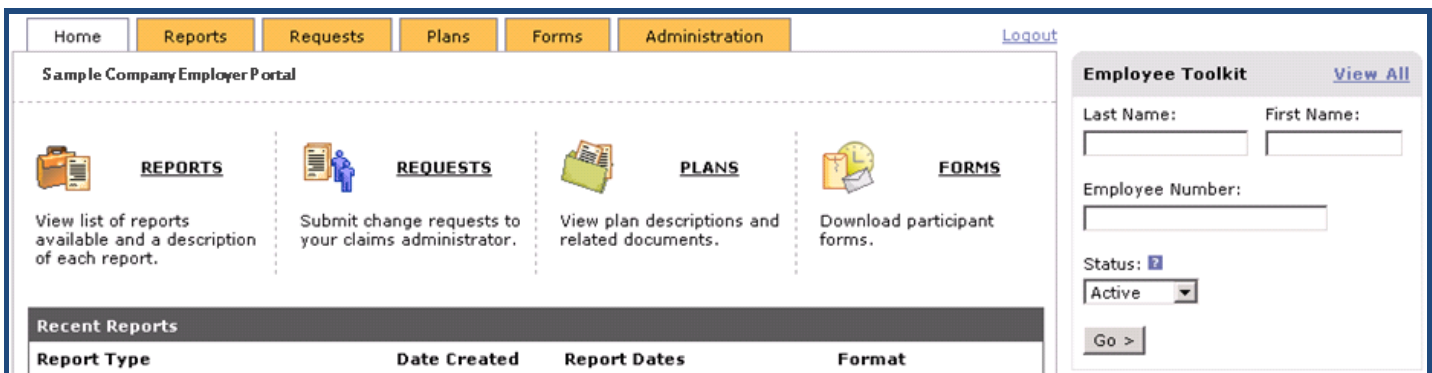
To access the Employer Portal, log on to our website at www.discoverybenefits.com. Click the blue Log In button in the upper right-hand corner of the screen.



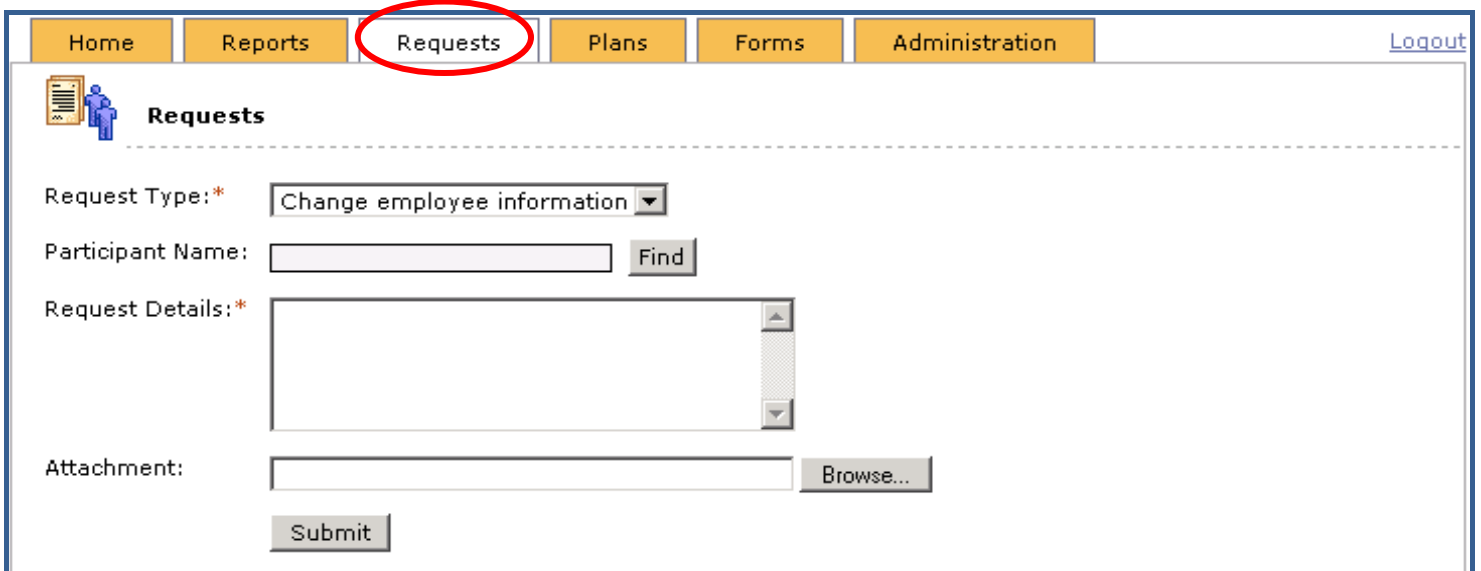
Select the [Employer Login – Reimbursement Account](#). Input your username and password.



Below is the screen you will see once you have successfully logged in:



Notice the third yellow tab called Requests:



Use the Requests tab for the following:

Uploading an Enrollment/Changes File

Most efficient method for communicating changes

Request Type – select “Other.”

Participant Name – please skip this field.

Request Details – insert the effective date(s) of the changes and/or updates.

Attachment – select the Browse to locate the enrollment/changes file on your desktop.

Select Submit.

Uploading a Payroll File *(Please disregard if the plan design you have chosen does not require a payroll file)*

Request Type – select “Other.”

Participant Name – please skip this field.

Request Details – insert the benefit deduction date.

Attachment – select the Browse to locate the payroll file on your desktop.

Select Submit.

- Providing and sending payroll files to Discovery Benefits is the employer’s responsibility. It is important that Discovery Benefits receives these files 2-4 days prior to every pay date. If we do not receive the files, we cannot post deductions to participants accounts, which can negatively effect reimbursement for participants.

Communicating Changes/Updates

Missing information will delay processing

Request Type – please select the choice that relates the most to your change/update.

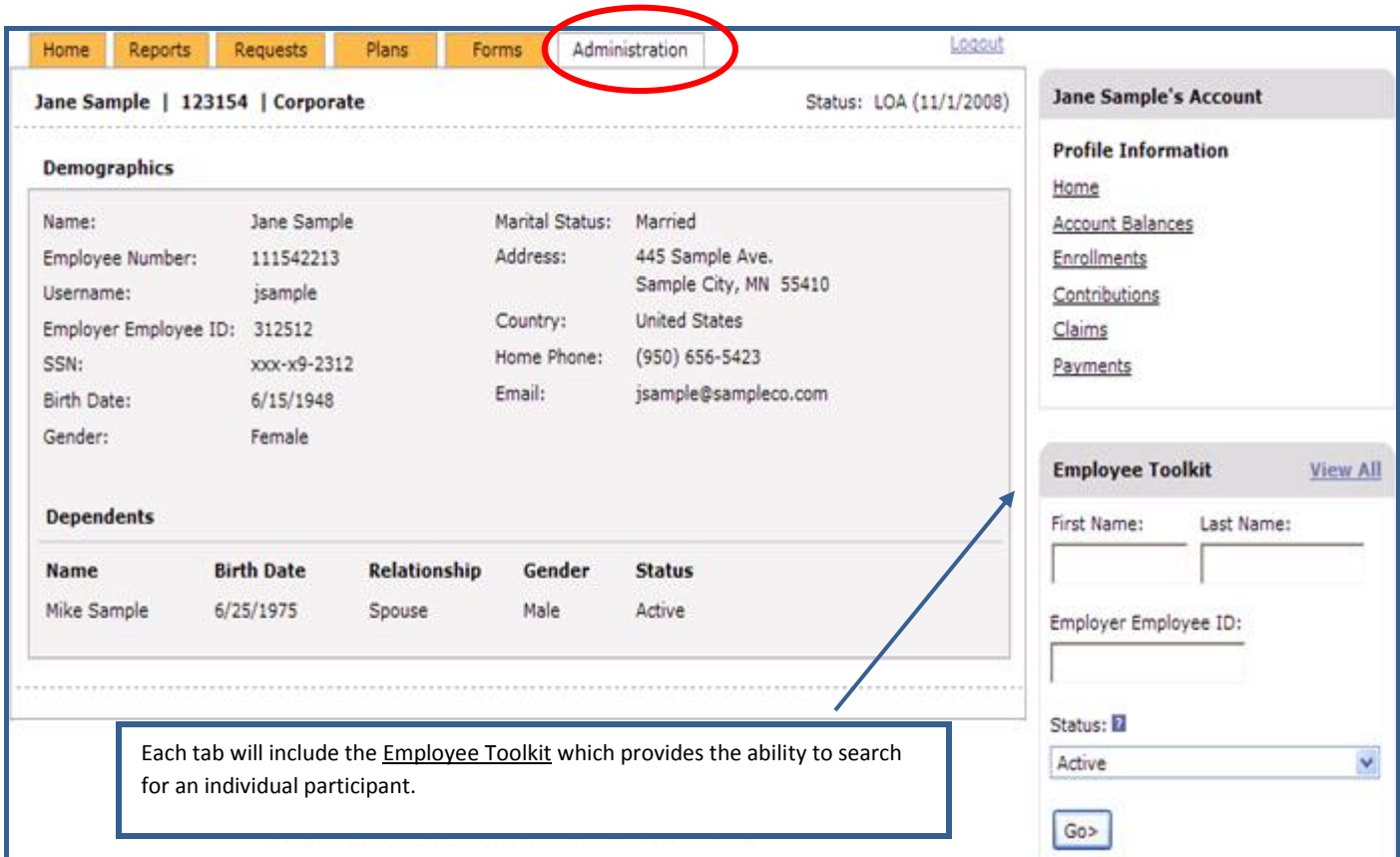
Participant Name – please skip this field or select the participant you are requesting the change for.

Request Details – insert the general information you are requesting and include the effective date of this change/update.

Attachment – select the Browse to locate the necessary form on your desktop.

Select Submit.

Notice the last yellow tab called Administration. This option offers enhanced viewing to navigate through a specific participant's account.



Home Reports Requests Plans Forms **Administration** Logout

Jane Sample | 123154 | Corporate Status: LOA (11/1/2008)

Jane Sample's Account

Demographics

Name:	Jane Sample	Marital Status:	Married
Employee Number:	111542213	Address:	445 Sample Ave. Sample City, MN 55410
Username:	jsample	Country:	United States
Employer Employee ID:	312512	Home Phone:	(950) 656-5423
SSN:	xxx-x9-2312	Email:	jsample@sampleco.com
Birth Date:	6/15/1948		
Gender:	Female		

Dependents

Name	Birth Date	Relationship	Gender	Status
Mike Sample	6/25/1975	Spouse	Male	Active

Employee Toolkit [View All](#)

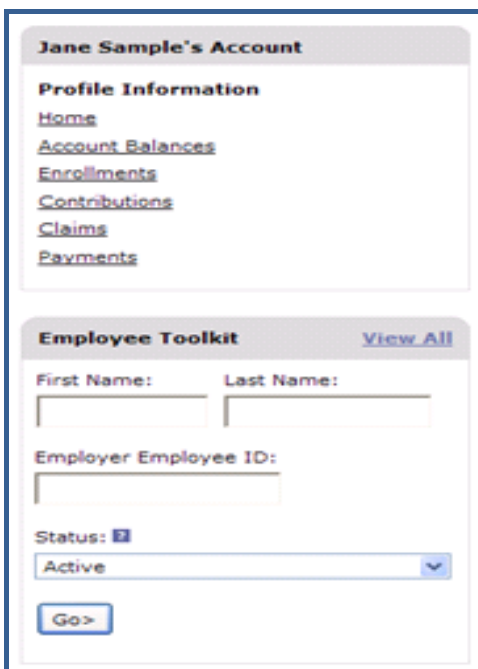
First Name: Last Name:

Employer Employee ID:

Status: Active

Each tab will include the Employee Toolkit which provides the ability to search for an individual participant.

Options under Profile Information:



Jane Sample's Account

Profile Information

- [Home](#)
- [Account Balances](#)
- [Enrollments](#)
- [Contributions](#)
- [Claims](#)
- [Payments](#)

Employee Toolkit [View All](#)

First Name: Last Name:

Employer Employee ID:

Status: Active

- Home – provides the participant's plan(s) and demographics.
- Account Balances – provides the participant view of account balance and plan rules.
- Enrollments – provides the participant view of enrollment(s) along with the payroll frequency.
- Contributions – provides scheduled payroll deductions and employer contributions. Allows functionality to filter by plan, type and status (posted, scheduled).
- Claims – provides participant claim detail and history.
- Payments – provides participant payment history. Allows functionality to view extended details for repayments.