

Online Enrollment Instructions



Open Enrollment Period: You may enroll in these benefits online during your open enrollment period. Please refer to your pin letter to review your open enrollment period.

It is important to know that once you start the enrollment process online you will need to complete each step. If you need to stop mid-way through the enrollment process you will be required to start from the beginning.

STEP 1 – Log In

- Locate the "Account Log In" option
- Click on the "FSA, HRA, Transportation, Pilot Log In" Button on the next screen

STEP 2 – Enter your log in information

Review the provided username and password information or call Participant Services for more information – 1-866-451-3399, option 1.

STEP 3 – Change your password

You will be prompted immediately to create a new, unique password before entering the site (6 to 10 characters with at least one number)

(Please be sure to record/memorize your password as Discovery Benefits does not record your password. Your account login information is yours alone and should be kept in a secure location. If you learn that any unauthorized person has accessed your online account information, please call us promptly.)

The screenshot shows the Discovery Benefits website interface. At the top, there is a navigation bar with links for Home, About, News, Jobs, FAQ, Privacy, En Español, Contact Us, Demos, and Log In. The 'Log In' link is circled in red. Below the navigation bar, the main content area features a header with the Discovery Benefits logo and a navigation menu (FSA, HSA, HRA, COBRA, Transportation). A central banner highlights the company's mission: 'We make employee benefits administration easy by providing extraordinary customer service, unique product solutions and smarter technologies. Simply put, we work hard to make it easy to do business with us.' Below this, there are promotional tiles for 'Updated List of IIAS Merchants' and 'Enroll Now in FREE Direct Deposit!'. A 'News' section follows, with a 'More news' link. The main navigation area is divided into three columns: Participants, Employers, and Consultants. Each column has sub-links for 'Account Log In', 'Printable Forms', and 'Health Savings Account (HSA)'. The 'Log In' section is located below the main navigation, with a red circle around the 'FSA, HRA, Transportation, HSA Log In' button. At the bottom, there is a search bar and a copyright notice: 'Copyright © 2008 Discovery Benefits, Inc. Simplify® is a registered trademark of Discovery Benefits, Inc.'

STEP 4 – Starting online enrollment

Click **Enroll** on the enrollment site to see a list of the plans offered by your employer.

Home | File Claims | My Account | Plans | Forms

Welcome to Online Administration, Janet Johnson

ANNUAL ENROLLMENT: 5/1/2007 - 6/30/2007 **Enroll**

HSA ENROLLMENT 7/1/2007 - 12/31/2007 (Demo Plan Year - 2) - HSA

What would you like to do?

- FILE CLAIMS**
Allows you to submit claims for those plans you are currently enrolled in.
- MY ACCOUNT**
Where you go to view:
 - Profile
 - Account Balance
 - Payment History
- PLANS**
Where you go to see plan descriptions and related documents.
- FORMS**
Where you go to download forms.

STEP 5 - Click Begin Your Enrollment Now.

You will be guided step-by-step through the enrollment process, so just follow along, enter the required information and click on "Continue" after each screen.

STEP 6 - Verify/update your Demographic Information in the "Profile" Section

STEP 7 - Add Dependents to the system.

- Enter your dependent's information, and click **Add** to include this dependent. Repeat this step for each eligible dependent you would like to add. You can edit your dependent information in the "My Dependents" Section by clicking "Update" or "Remove".

STEP 8 – Review Eligibility Information.

- The eligibility section asks a series of questions which determines if you are eligible to have an HSA and if so, what the maximum dollar amount you can contribute.
- If you are not eligible, a Summary Screen will explain the reasons for this. You may edit the information you have entered on the Summary Screen.

STEP 9 - Make Plan Elections.

- Enter either your Annual Election or Pay Period Election in the "My Election" Row.
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Discovery Benefits simplify.®

- If the annual election amount is entered, the pay period election amount is automatically calculated. The same is true if you enter the pay period election, then the annual election amount is automatically calculated.

STEP 10 - Select the payment method for disbursements.

- Enter your bank's routing number and click "Find Your Bank".
- If the system is unable to find your bank, simply enter the requested information. Otherwise your information should be populated with the bank's information you chose.

Profile Dependents Eligibility Election Disbursements Beneficiaries T & C Summary

Bank Account

Routing Number:* [Change Your Bank](#)

Account Number:*

Account Type:*

Account Nickname:*

Bank Name:*


Address Line 1:*

City:*

State:*

Zip Code:*

* = required field



STEP 11 – Add Beneficiaries.

- This is where you may designate who you want as your beneficiaries by percentage. The percentage may not be greater than 100 or less than 0.
- If you choose dependents from the box on the right side of the page, their information will be populated automatically.
- A contingent beneficiary is the person or persons who will receive the money if all of the primary beneficiaries are deceased.

STEP 12 – Terms and Conditions

- Read over the terms and conditions of the plan. Check that you have read and agree with both the Designated Representative Agreement and the Custodial Agreement.

Step 13 - Summary

- Read over the Summary to verify all the information is correct. Once the information is correct, click the "Submit" button.
- You will then reach the "Enrollment End" page. If you agree with the statements listed, click "Yes" and your enrollment is finished!
- You will receive a confirmation that you have successfully completed the enrollment process.