Flores HR



Participant Portal User Guide

https://accounts.floreshr.com

Convenient, online access to your benefit account

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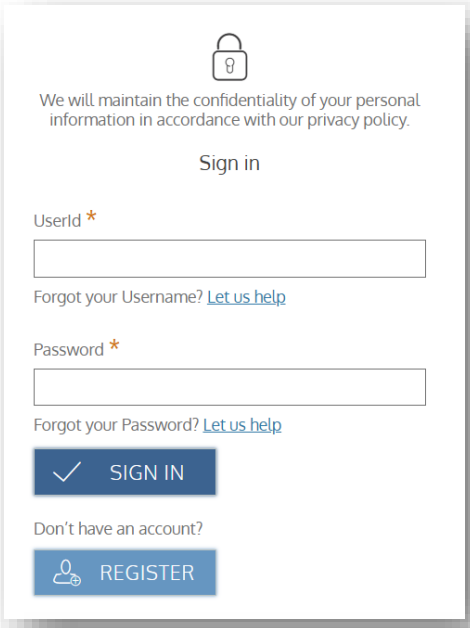
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Getting started

Visit https://accounts.floreshr.com to access the FloresHR Participant Portal.

Registration

Step 1: Click **register** to create an account.



Step 2: Complete your registration in a few easy steps.

1. Enter your **name** and **zip code**. If you have received a benefit debit card, check the box to **enter the card number** and expedite the registration process.
2. We'll send you a special code for verification. Check your email or text messages and **enter the code** provided.
3. **Create** a username and password for your account.
4. **Select** four security questions and **provide** your answers. For your security, these questions may be randomly asked during subsequent logins.
5. **Confirm** your email address.
6. Review your answers and **submit** your registration.



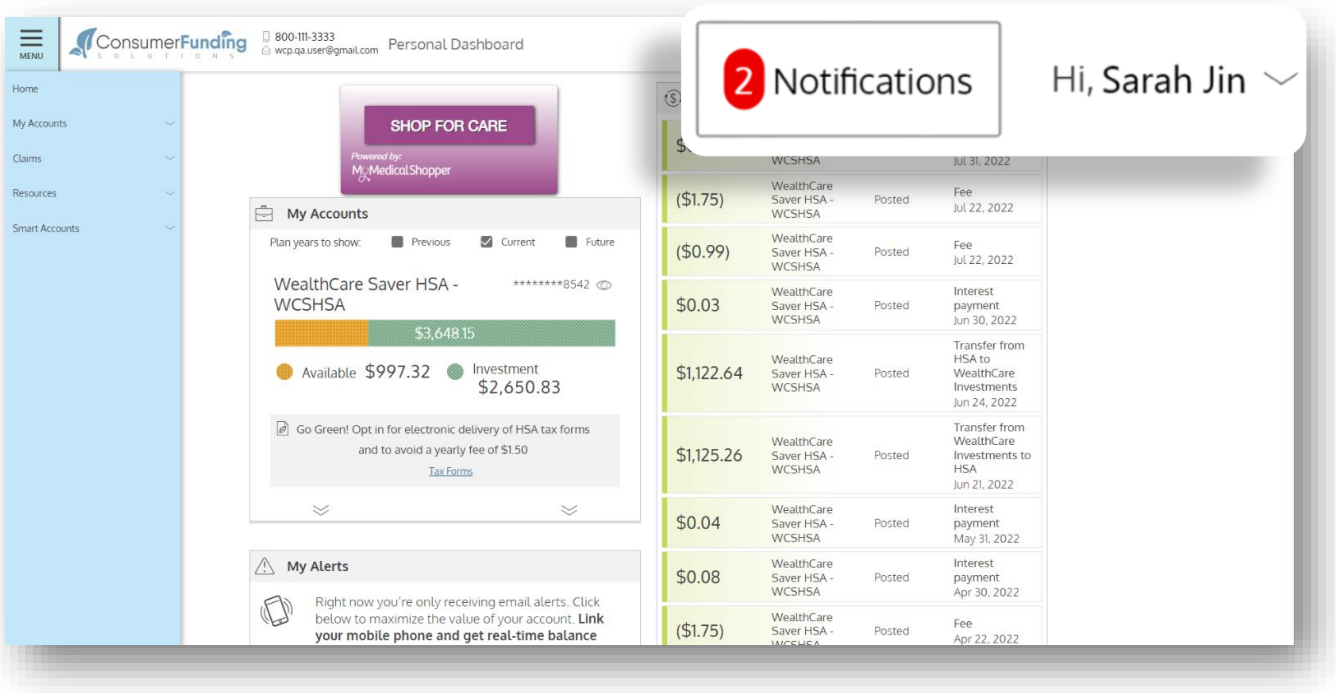
Step 3: Once you've successfully registered, click **done** to sign in.

Signing in

Enter the **username** and **password** you created. You may be asked to **answer** your security questions or enter a one-time passcode, sent to you via email or SMS text.

Menus

With the FloresHR Participant Portal you can manage your healthcare spending accounts, claims and transactions in one easy place.



Use the icons in the upper right of the screen to view notifications or edit your profile.



Notifications

Click **notifications** to view your news and alerts. The number in red tells you how many unread notifications you have.



Drop-down menu

Click the **drop-down menu** to access your:

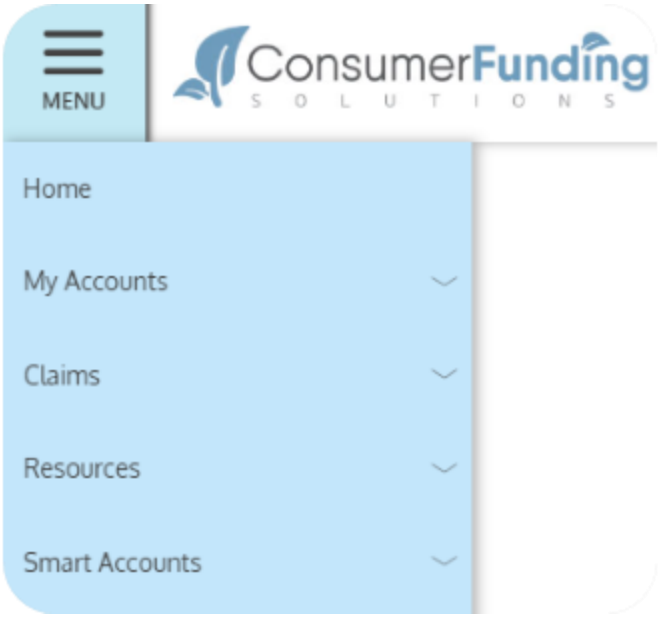
- Profile
- Debit card information
- Communication settings
- Contact us
- Log out

Main menu

Expand the hamburger **menu** on the upper left of your personal dashboard to navigate to your accounts, claims and other resources.

Click  to expand the menu.

Use the **home** button to return to the main screen of your personal dashboard from any other screen within the portal.

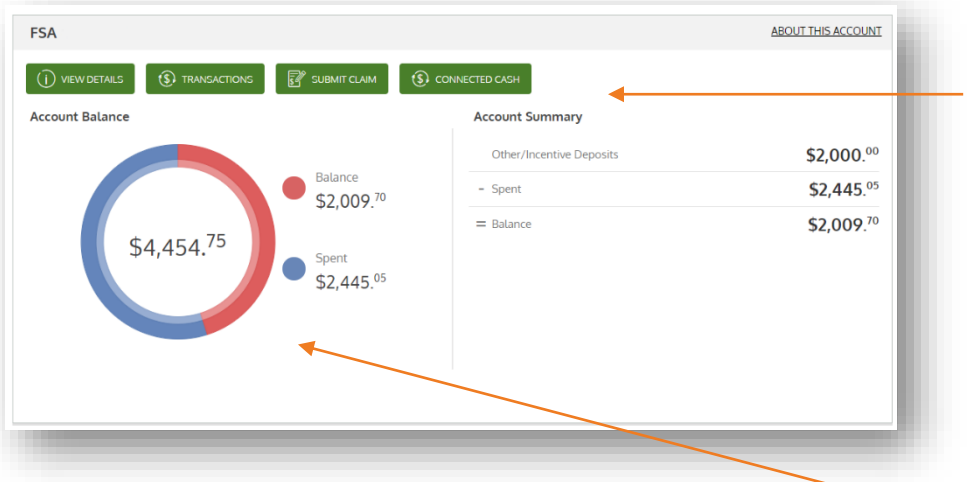


Checking your account balance(s)

The benefit account summary page provides a quick view of your account balance(s).

Get there by clicking **menu > my accounts > account summary**

Each of your accounts displays in its own box with the account type listed on top. A flexible spending account (FSA) is displayed in the image below.



Quick links to additional account details, a list of transactions, claim submission, and other tools!

Your **annual** election balance, split into how much has been spent and how much is still available to spend.

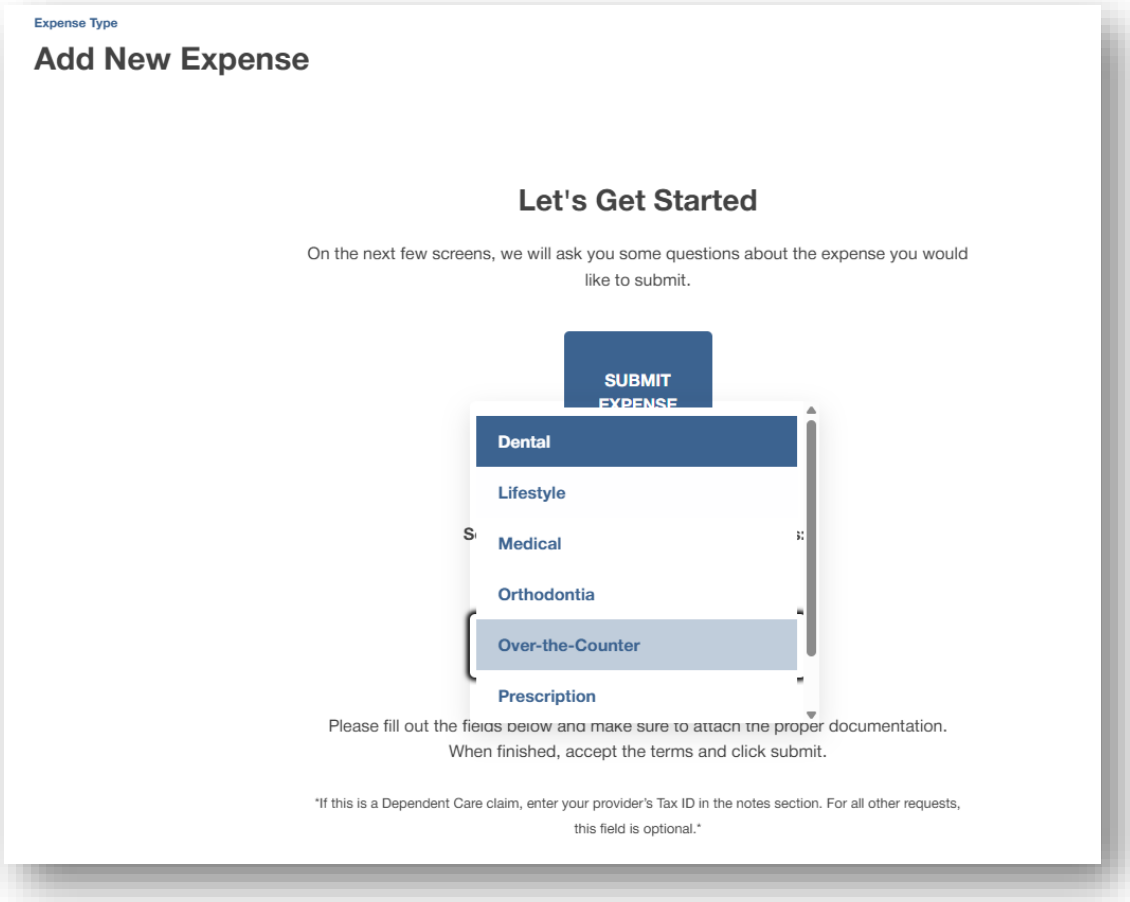
Submitting a claim or expense

The *Add Expense* wizard will walk you through a series of questions to help you submit your request correctly.

To use the expense wizard, click **Menu > Reimbursements > Issue Reimbursement.**

Answer the questions and upload documentation as needed.

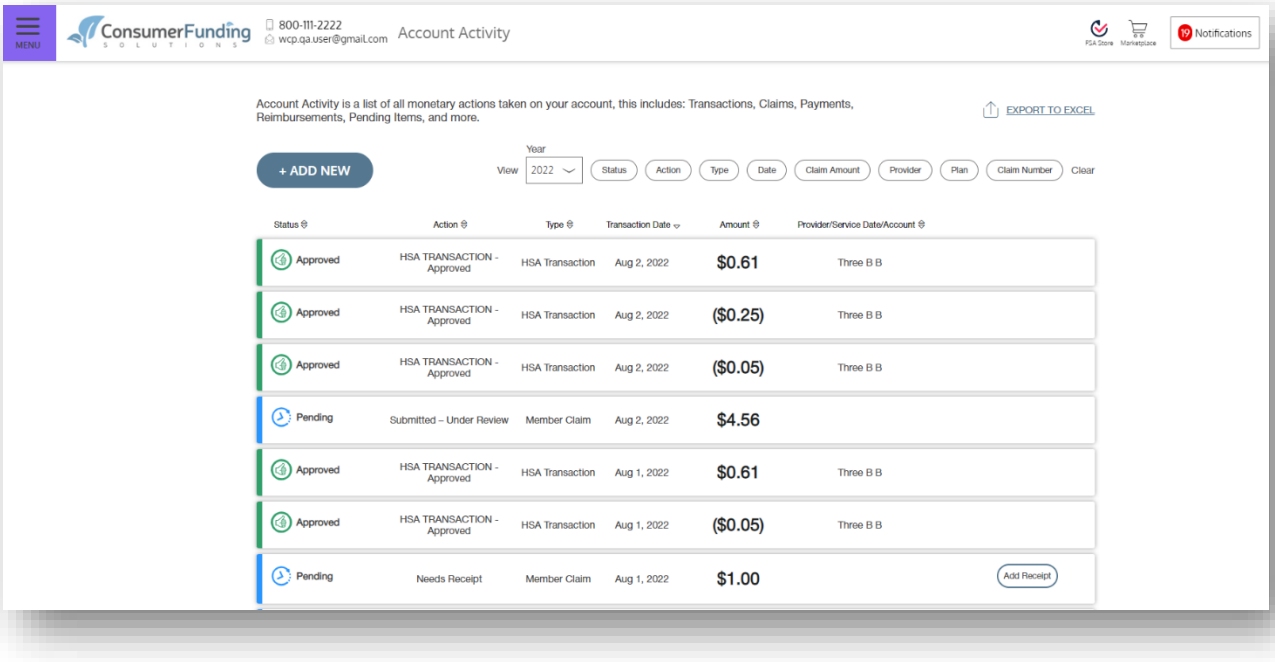
You may choose to receive reimbursement by check via mail or set up direct deposit to your bank account.



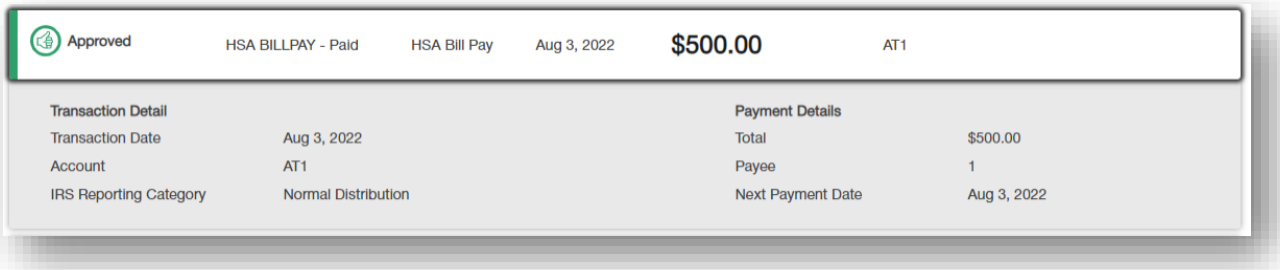
Viewing claims and expenses

View claims and transactions on the *Claim Activity* page. Use the buttons on top to filter transactions by year, plan, status and more!

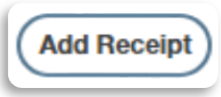
To view, click **Menu > Reimbursements > Claim Activity**



Click on an individual transaction to view its **details** and take action, as needed. Based on your policy and purchases, transactions may be marked as Approved, Pending, Action Required, or Denied.



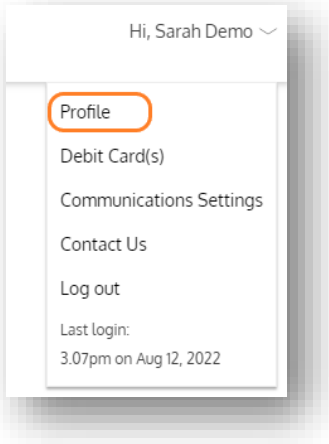
If a receipt is required, the option to attach one will show within the transaction. Adding a receipt may also help resolve pending transactions faster.



Click **add receipt** to attach your document for review.

Your user profile

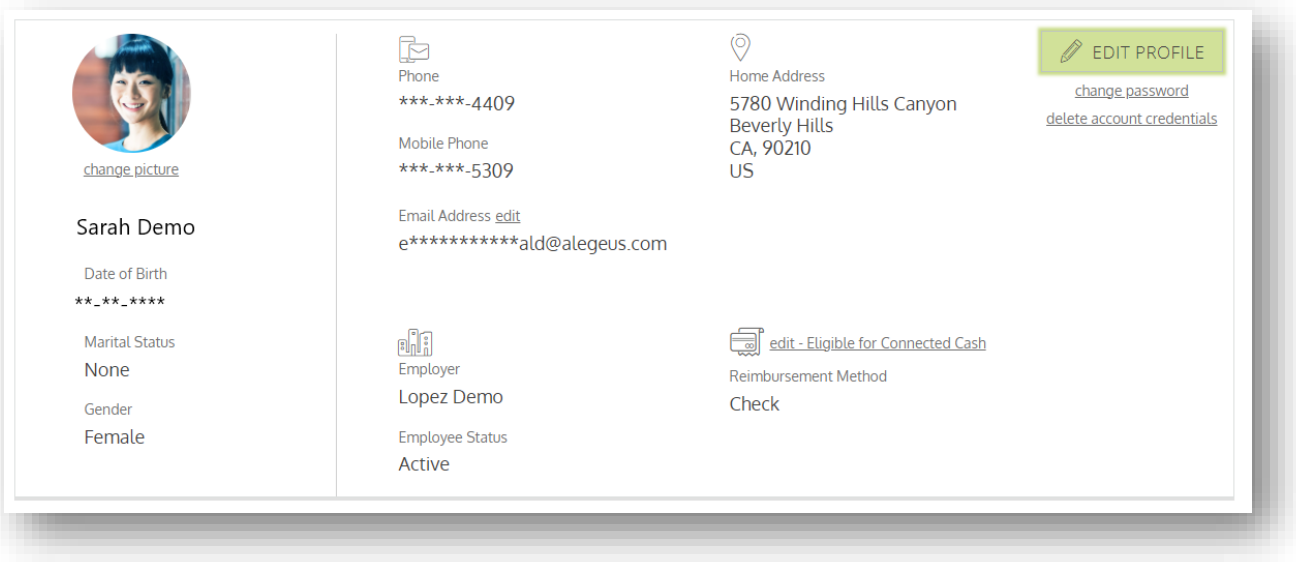
Click the drop-down next to your **username** and select **profile** to view your personal information.



From this page, you can see your:

- Phone number and address
- Reimbursement method
- Dependent information
- And more!

To change your personal information, click **edit profile** from within your profile page, or **edit dependent** from your list of dependents below.

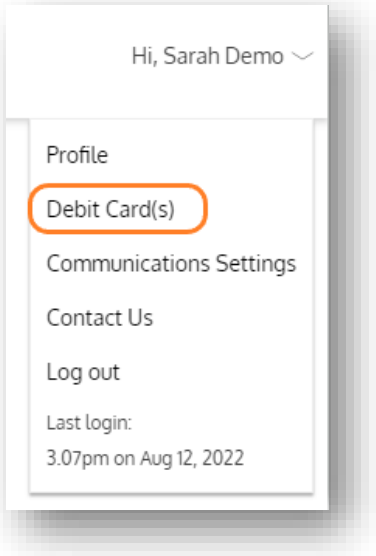


Note: You can update your **mobile phone number** from within your profile, however, you may still need to update your SMS notifications within the **communication settings** page to change your alert preferences.

Debit cards

You can view the benefit account debit cards that have been issued to you and your dependents from within the portal.

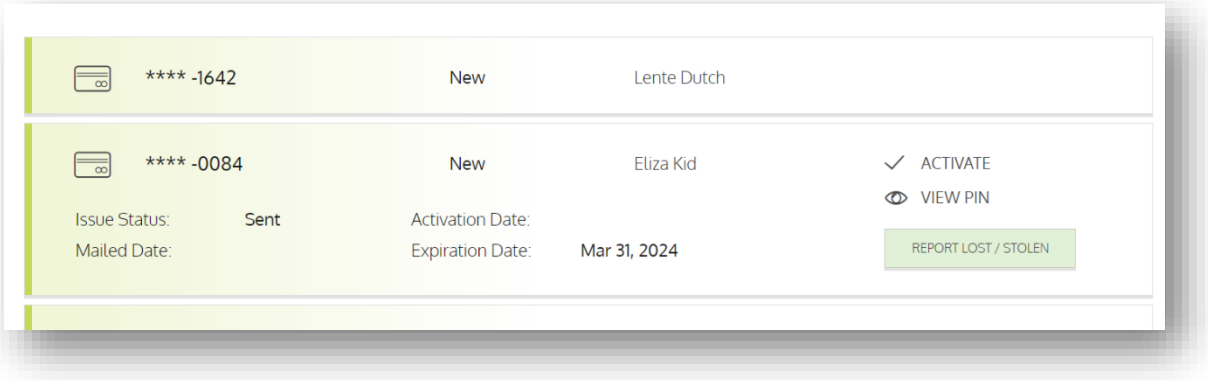
To view your benefit account debit cards, click the drop-down by your **username** and select **debit cards.**



Click on an individual card to view more information. From here you can:

- Activate a new card
- View the card pin
- Report the card lost or stolen

You can also request cards for your dependents, if they haven't received one, by clicking **issue debit card** next to their name at the bottom of the page



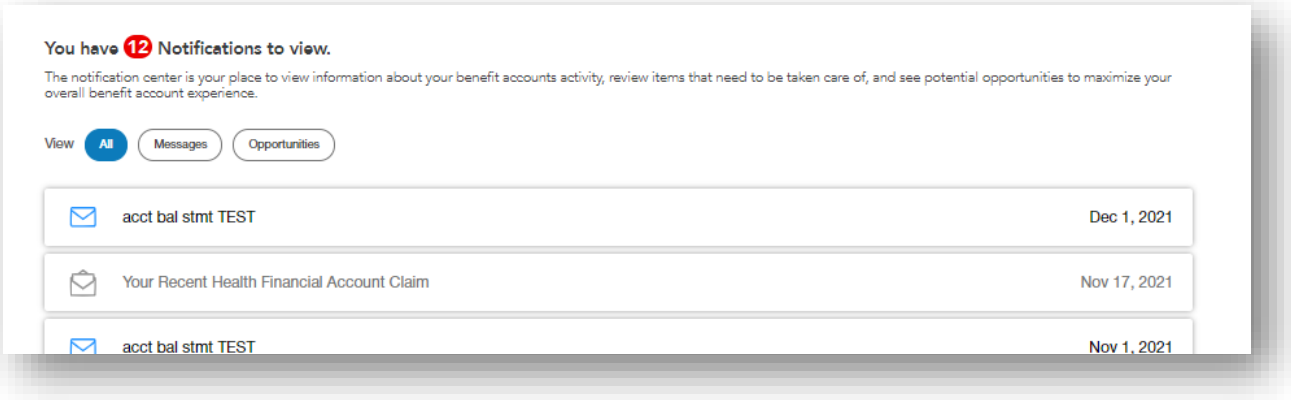
Managing alerts & messages

The notification center is your place to view account messages, items awaiting action, and potential opportunities.



To view, click **notifications** on your **personal dashboard**. The number in red alerts you of unread notifications.

Click on an **individual message** to see the full text.



Messages provide important information about your account(s). Be sure to check your notifications for crucial messages.

Opportunities are tips and tricks that can help you maximize your benefit accounts, such as suggesting to switch to direct deposit reimbursements or electronic-only statement delivery. You may also be presented with opportunities to invest your HSA dollars, or save money on prescription drugs.

Changing your alert preferences

Change your alert preferences from the communication settings page. Click the drop-down next to your **username** and select **communication settings.**

For each alert, choose whether you receive mobile, email, both, or no notifications.

Click **save** when you are done editing your preferences.

You can also update your email address and register your mobile phone for SMS text alerts.

