OPTUM™

Employer Portal

Quick Start Guide

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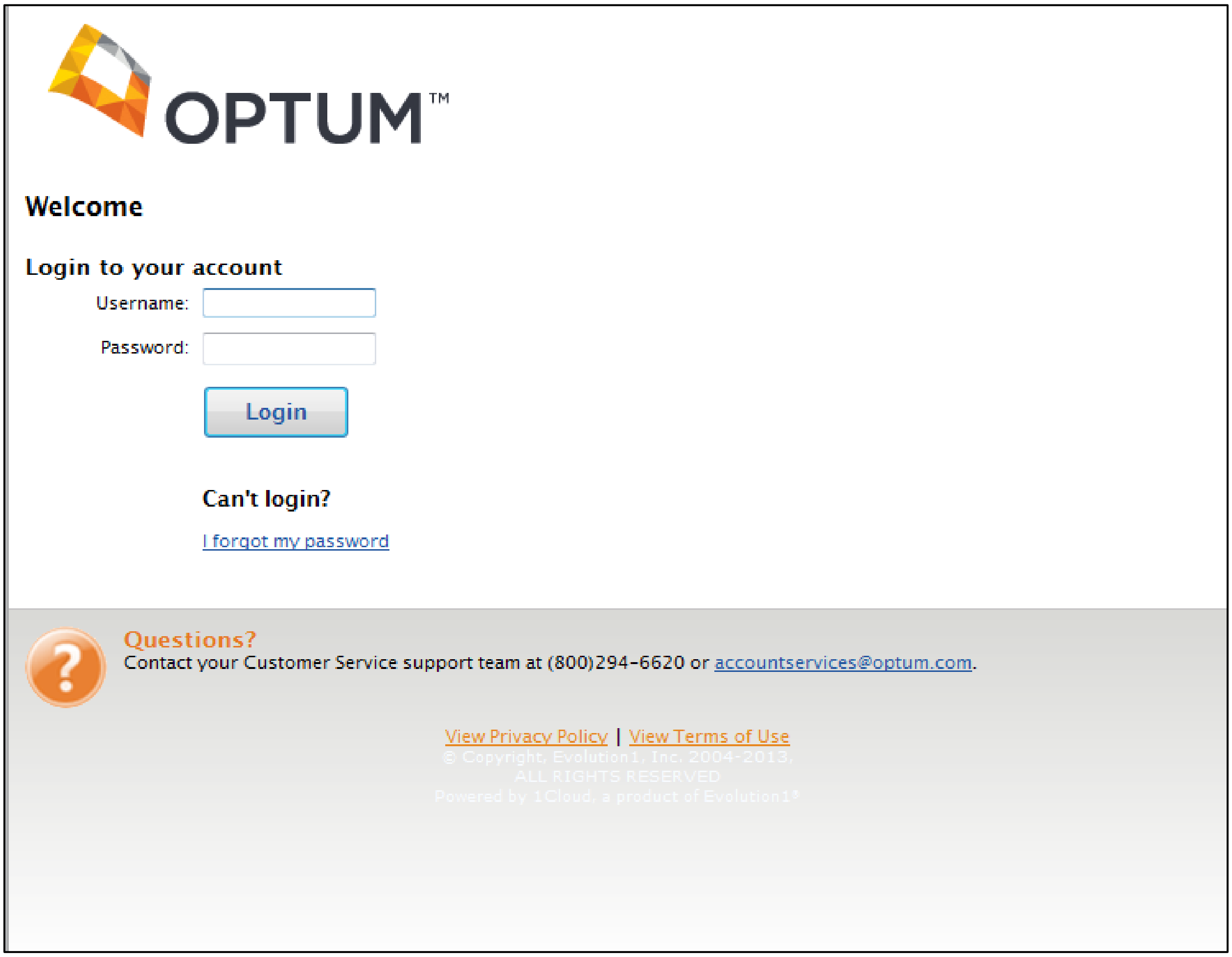
Logging into the Portal

Go to https://employers/optumhealthfinancial.com and enter the username and temporary password you received via email.

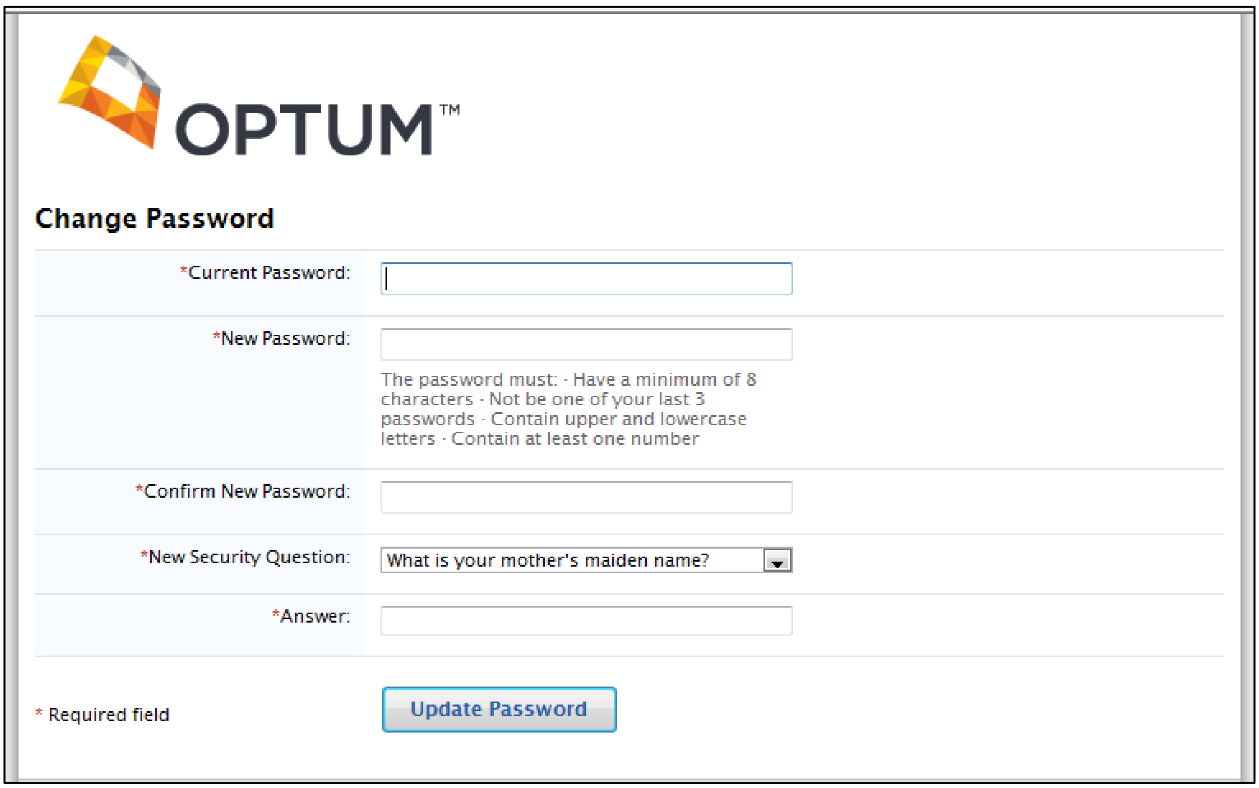


Resetting your password

Once you have entered your username and temporary password, the system will bring you to the **Change Password** page to reset your password. Your new password must meet the below requirements.

- minimum of 8 characters
- cannot match one of your last 3 passwords
- contain upper and lowercase letters
- contain at least one number

You will also need to select a security question and answer. Once completed, you can click **Update Password**.



User Access

You are assigned one or more roles that determine what features you have access to. If you require access to one of the features in the below sections of the manual that you do not currently have, please submit a request to your administrator or see the Contact Us section below.

- **Benefits Administrator**
  - View plans, access resources, and submit requests for your administrator.
- **Employee Administrator**
  - Manage individual employee data via an online form. May include adding new employees, adding dependents, updating employee profiles, updating dependents, enrolling employees, adding and updating employee enrollments.
- **Import Administrator**
  - Import new files, view the import queue, take action on files in the import queue and access the exception log to view errors within import files or updated errors and resubmit new files. Schedule recurring contributions.
- **Import Monitor**
  - View the import queue and access the exception log to view errors within import files.
- **Report Manager**
  - Request, view and remove reports.

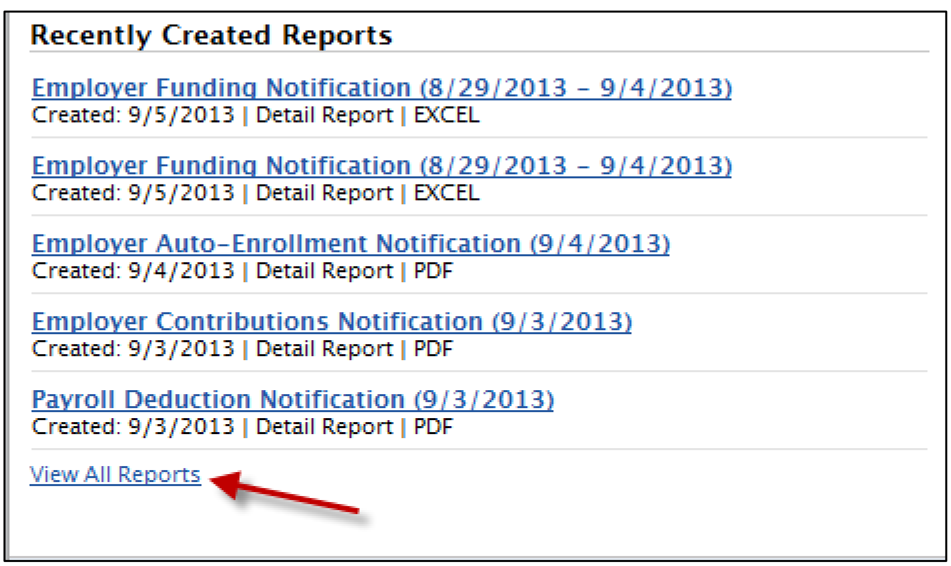
Navigating the Portal

Navigating the Home Page

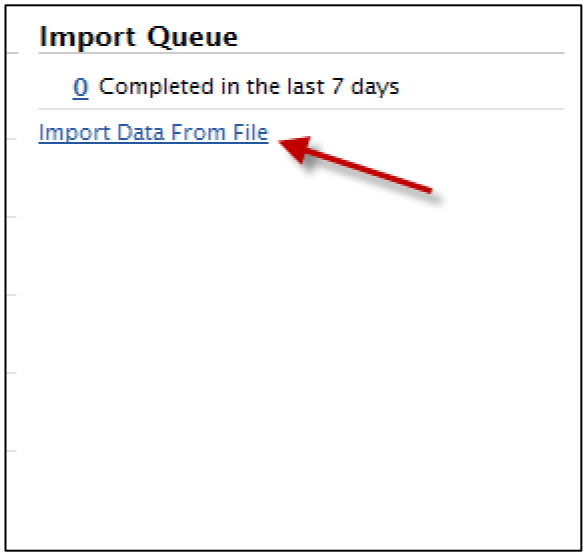
Once logged in, the first visible page will be the **Home** page. Some or all of the items shown on the below **Home** page may not be visible depending on your user access.

From the **Home** page, you are able to access your **Recently Created Reports** by clicking on the blue hyperlinked name of each visible report. The reports are created in either PDF or EXCEL; this is indicated below each report name.

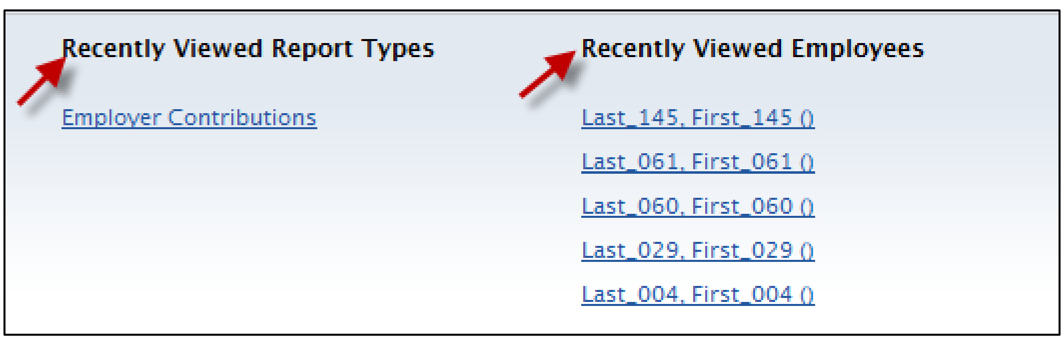
You can go to the **Reports** page by clicking on **View All Reports** which appears below the list of reports (see section **Navigating the Reports Page** for more information).



You can also view the **Import Queue** from the **Home** page. You can see the number of files imported in the last 7 days and access the **Import** page by clicking the link **Import Data From File** (see **Navigating the Imports Page** for more information).



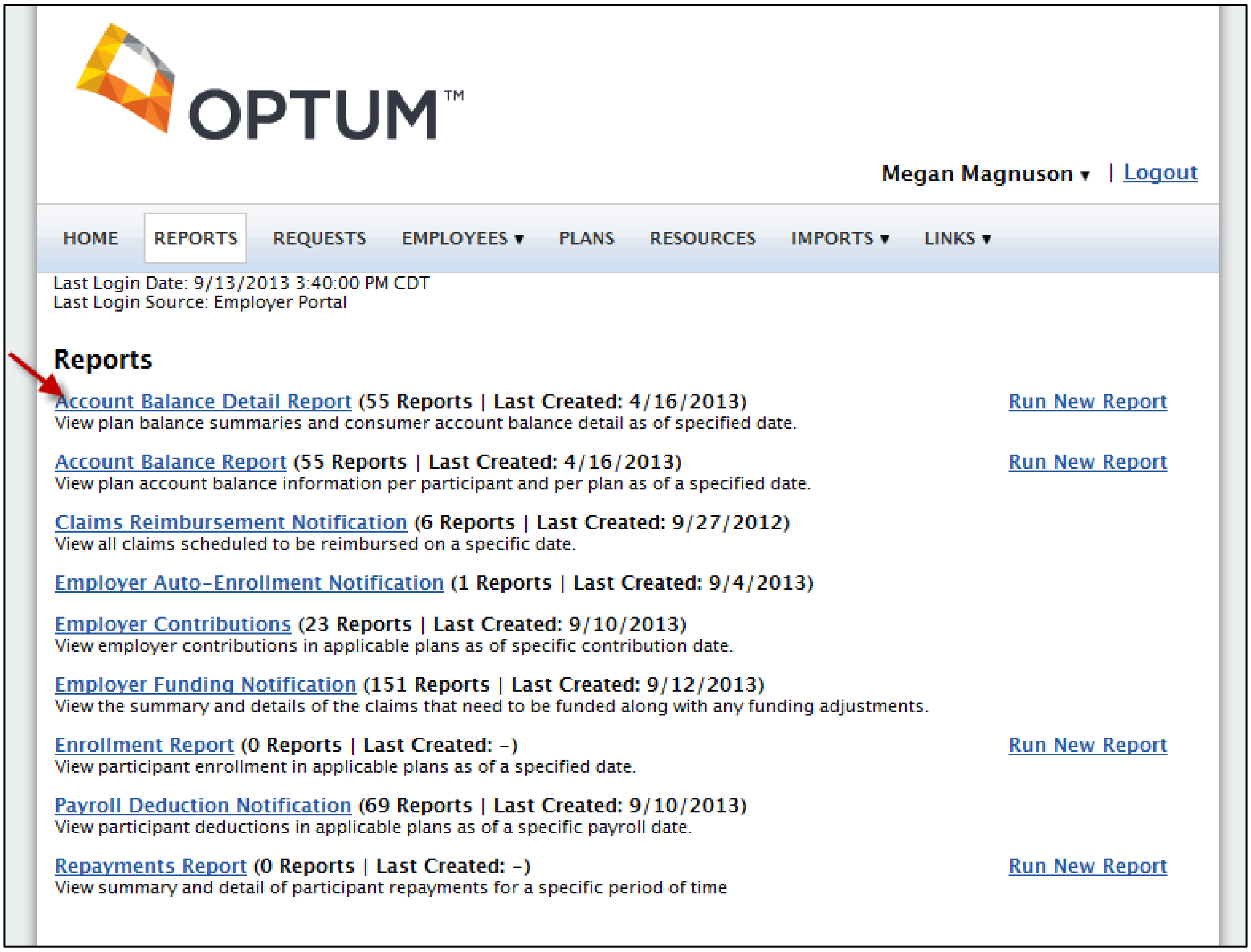
From the **Home** page, at the bottom of the screen, you can also view your **Recently Viewed Report Types** and **Recently Viewed Employees**



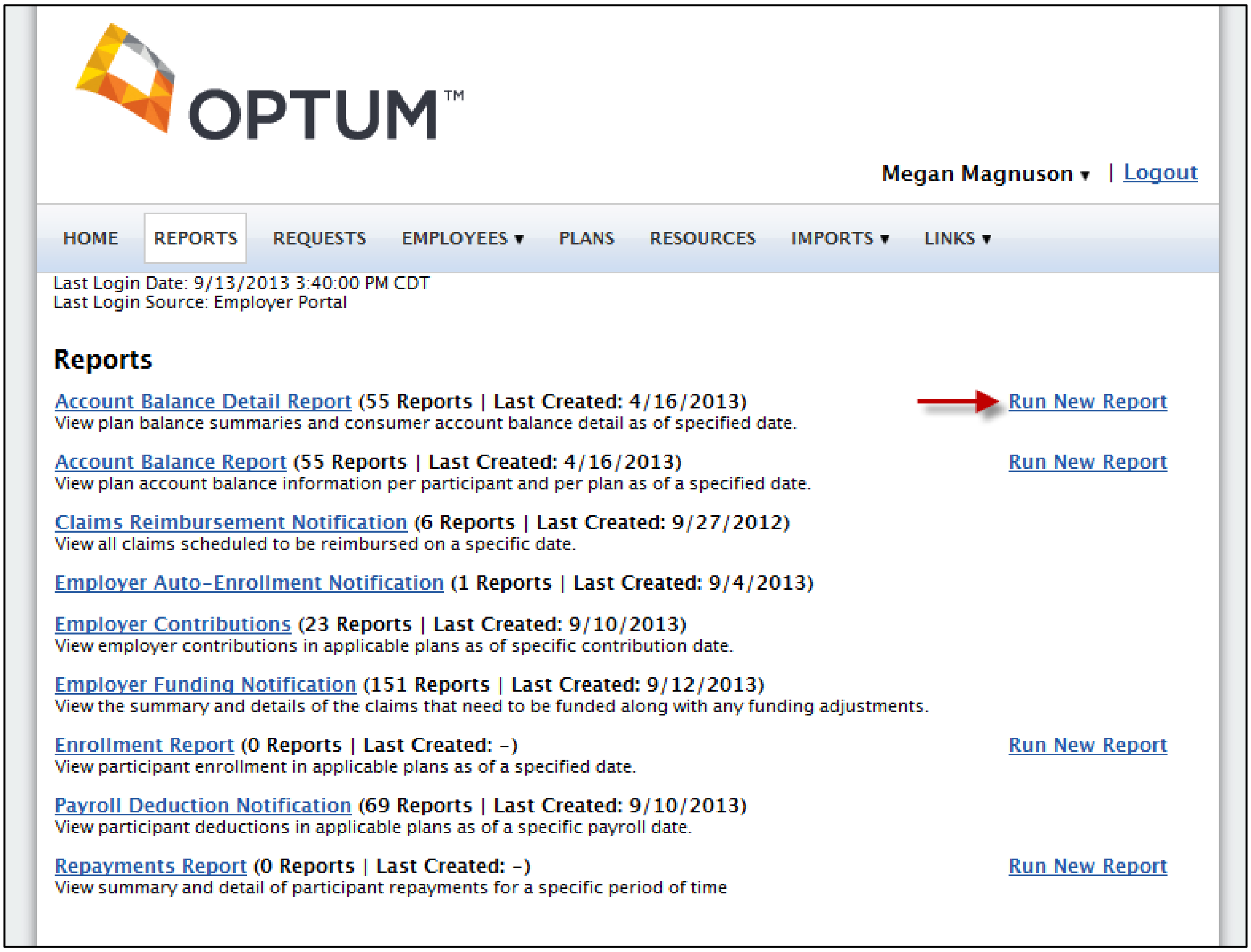
From this view, there are two ways to access the other pages. You can use the navigation panel that appears across the top of the **Home** page or by clicking the links on the bottom left of the screen. These will appear in the same location of each page.

Navigating the Reports Page

From the **Reports** page, you can view all available reports. You can access these reports by clicking on the blue hyperlinked name of each report. Some or all of the items shown on the below **Reports** page may not be visible depending on your user access.



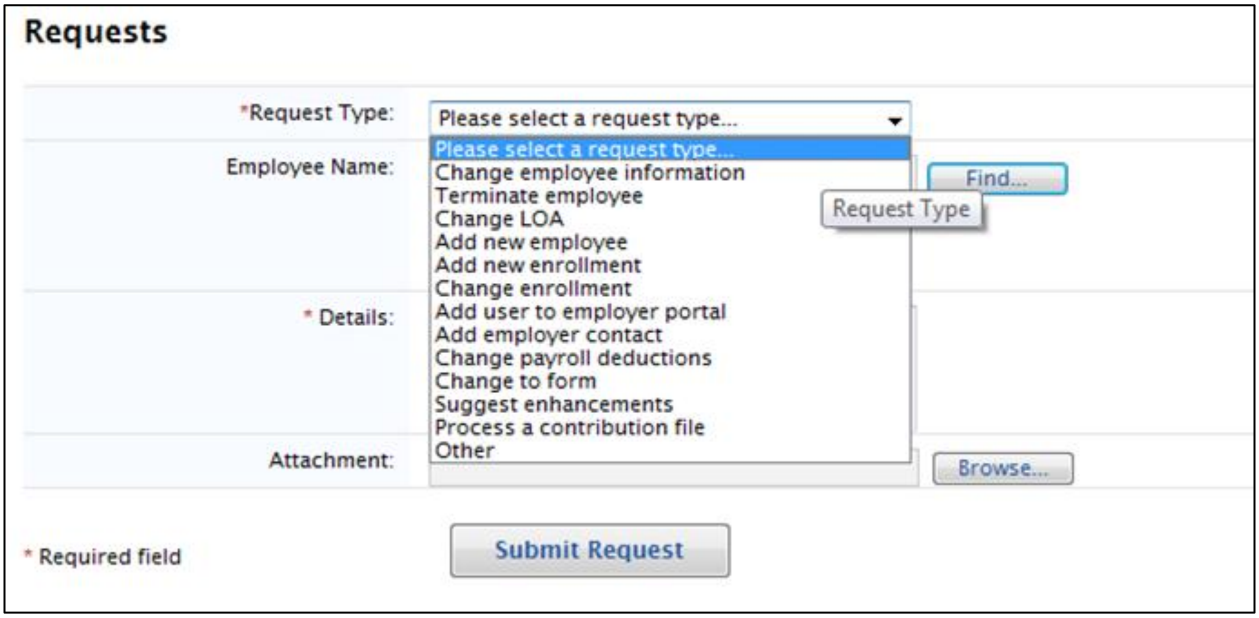
If available, you can also run a new report by clicking **Run New Report** to the right of the report name.



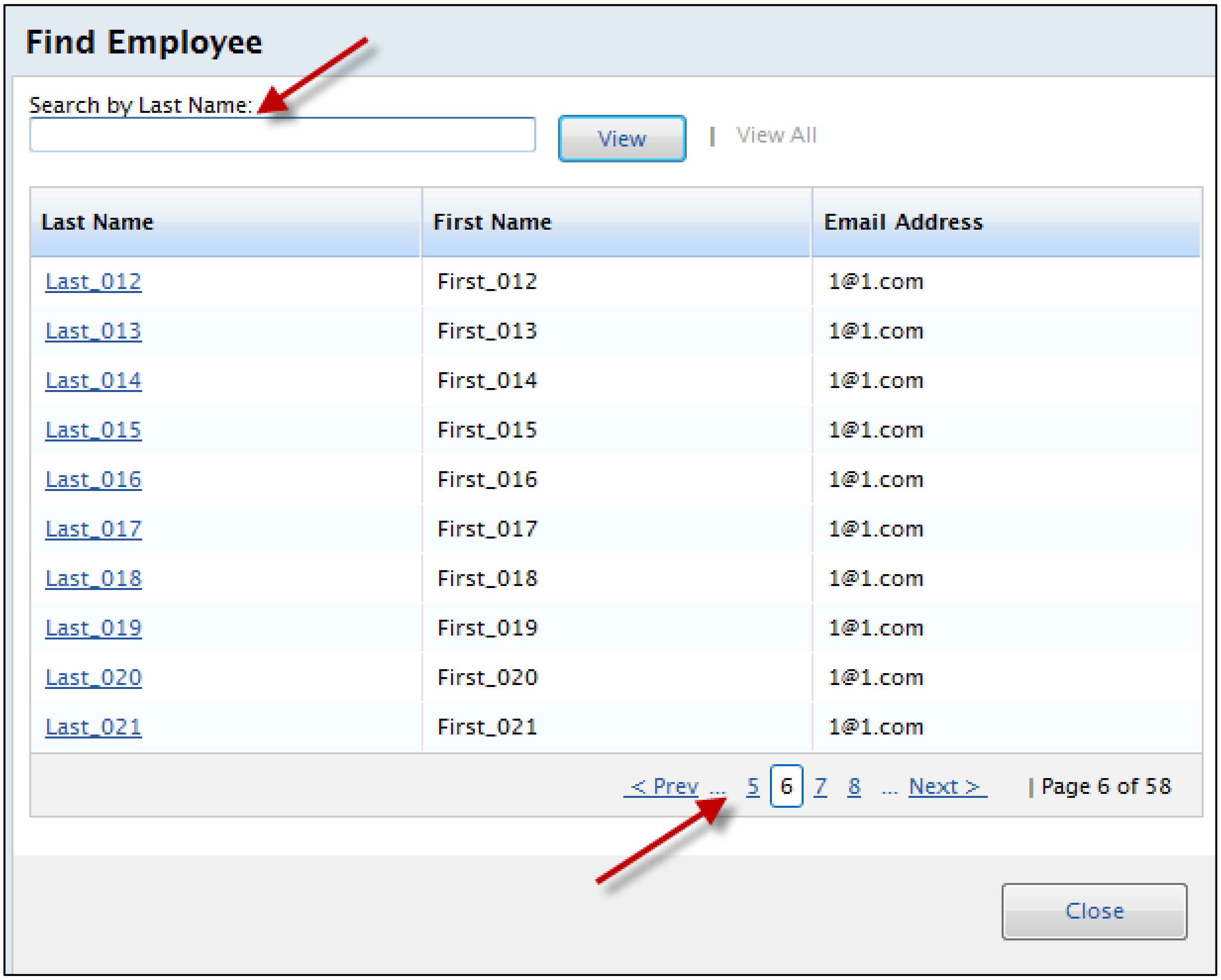
Navigating the Requests Page

You can utilize the **Requests** page to submit a request for such actions as adding a new employee, changing an employee's enrollment and so on. Some or all of the items shown on the below **Requests** page may not be visible depending on your user access.

You will first select the request type from the drop down list.



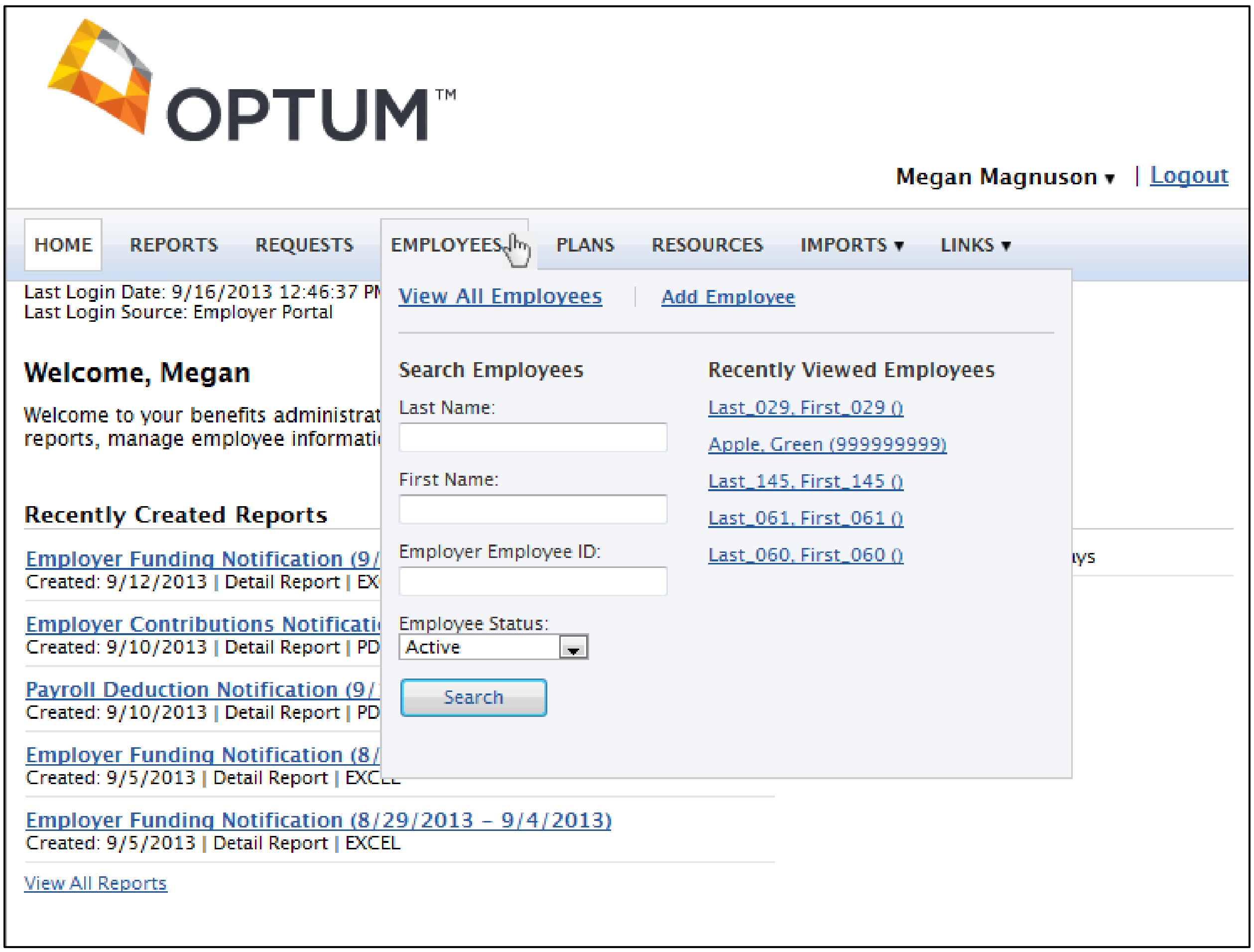
To enter the Employee Name, select the **Find** button. You can then either search by the employee's last name or browse through the pages of all employees. Once the employee is selected, you will add the specifics of your request to the **Details** section and attach any applicable files.



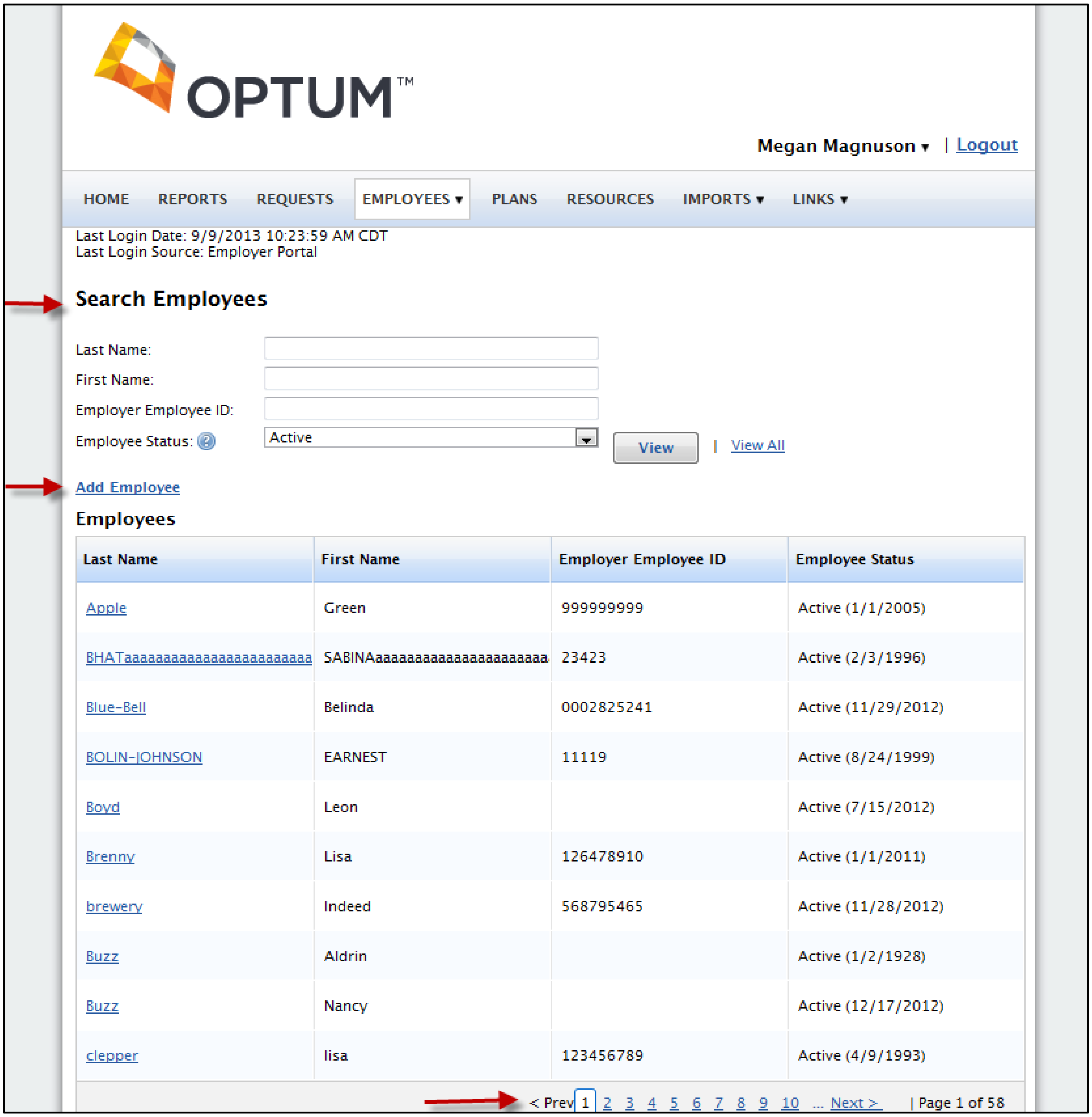
Navigating the Employees Page

When you scroll over the **Employees** tab in the navigation panel you will see several shortcuts to the available actions in the **Employees** page. Some or all of the items shown on the below **Employees** page may not be visible depending on your user access.

From this shortcut you can click links to **View All Employees**, **Add Employee, Search Employees,** and select any **Recently View Employees**.



You can also access the same actions mentioned above by clicking on the tab.



To add a new employee, click **Add Employee** and fill in the Employee profile shown below. To submit the new employee's profile click the **Add Employee** button at the bottom of the screen.

When viewing an individual employee's record you can see the employee's Profile, **Account Summary**, **Enrollments**, **Contributions**, **Claims**, **Payments**, and **Status**.

Navigating the Plans Page

Navigating to the **Plans** page will allow you to view any active plans including the effective dates and a basic description. To open one plan specifically, you can click on the blue hyperlinked plan name. Some or all of the items shown on the below **Plans** page may not be visible depending on your user access.

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Megan Magnuson ▾ | Logout

HOME REPORTS REQUESTS EMPLOYEES ▾ PLANS RESOURCES IMPORTS ▾ LINKS ▾

Last Login Date: 9/13/2013 3:40:00 PM CDT
Last Login Source: Employer Portal

Plans

Active Plans

Medical Flex (5/4/2014 – 5/4/2015)

What is a health care flexible spending account (FSA)? How does a health care FSA work?

A health care flexible spending account (FSA) is an expense reimbursement account offered through an employer that allows employees to set aside part of their earnings, before income taxes are deducted, to pay for eligible health-related expenses. By setting aside pre-tax dollars in a health care FSA, you can reduce your taxable income and increase your after-tax income because every dollar contributed to a health care FSA reduces your earnings by the same amount. This money is then returned to you in the form of reimbursements for health care expenses that you have already paid out-of-pocket.

You can use the funds in a health care FSA to be reimbursed for out-of-pocket health care expenses that you incur personally or that are incurred by your spouse or dependent. After an eligible expense has been incurred, you submit a claim, along with supporting proof. If the claim is approved, a reimbursement check will be mailed to your home in approximately two weeks. If you prefer, your reimbursement can be deposited directly to your account. Health care FSA contributions do not rollover to the next Plan Year so you must use all health care FSA contributions made during a Plan Year by the end of the plan year, or the funds will be forfeited.

Dependent Care (5/4/2014 – 5/4/2015)

What is a Dependent Care Flexible Spending Account (DC FSA)? How does a dependent care spending account work?

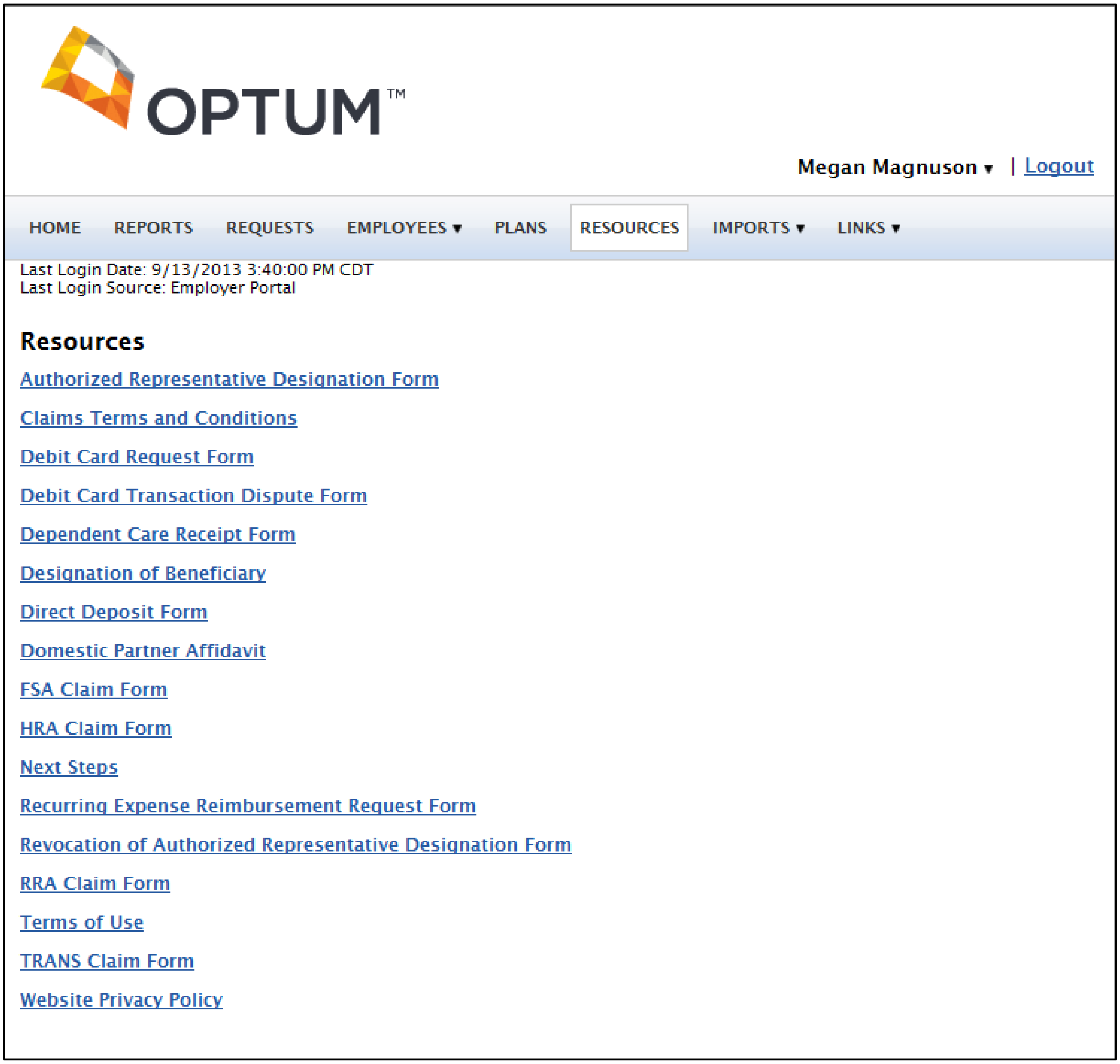
A Dependent Care Flexible Spending Account (DC FSA) is a specific type of expense reimbursement account offered by an employer that allows employees to set aside part of their earnings, before income taxes are deducted, to pay for eligible expenses related to caring for a dependent so the employee or his/her spouse can work. By setting aside pre-tax dollars in a DC FSA, you can reduce your taxable income and increase your after-tax income because every dollar that you contribute decreases your earnings. As a result, the amount of taxes that you pay is reduced by the same amount. This money is returned to you in the form of reimbursements for dependent care expenses that you have already paid out-of-pocket.

IRS regulations cap total DC FSA contributions at $5,000 per household per year. Most people think of a DC FSA in terms of reimbursement for childcare services. However, adult day care services for an adult dependent, such as an elderly relative, also are reimbursable. DC FSA contributions *do not* rollover to the next Plan Year so you must use all DC FSA contributions made during a Plan Year by the end of the Grace Period or the funds will be forfeited.

After an eligible expense has been incurred, submit a reimbursement claim, along with supporting documentation, to your claims administrator by fax, email, online or mail. If the claim is approved, a reimbursement check will be mailed to your home in approximately two weeks. If you prefer, your reimbursement can be deposited directly to your bank account. <

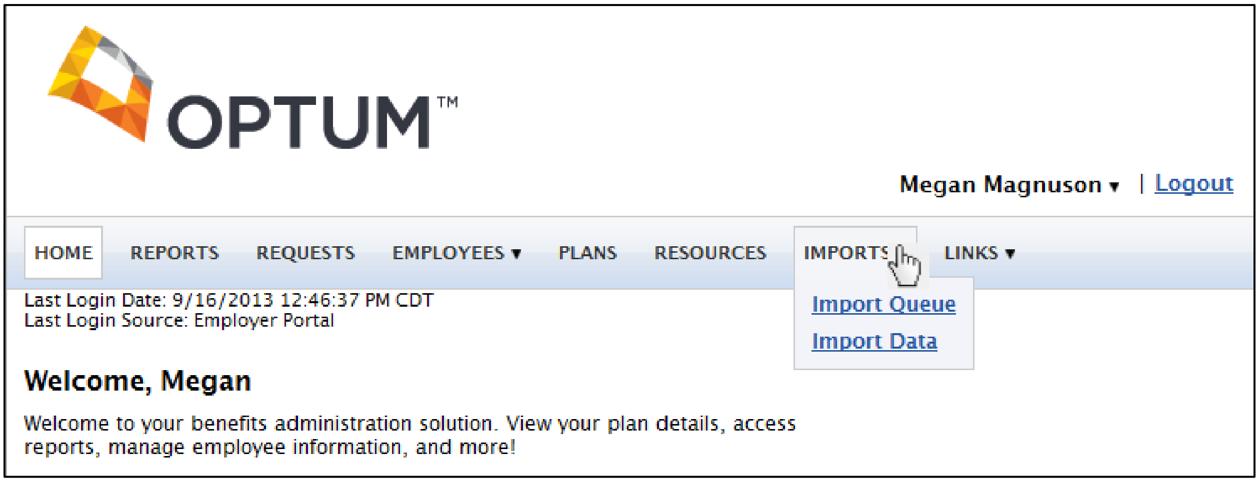
Navigating the Resources Page

On the **Resources** page you will see a list of forms that can be accessed by both the employer and the participant. Some or all of the items shown on the below **Resources** page may not be visible depending on your user access.

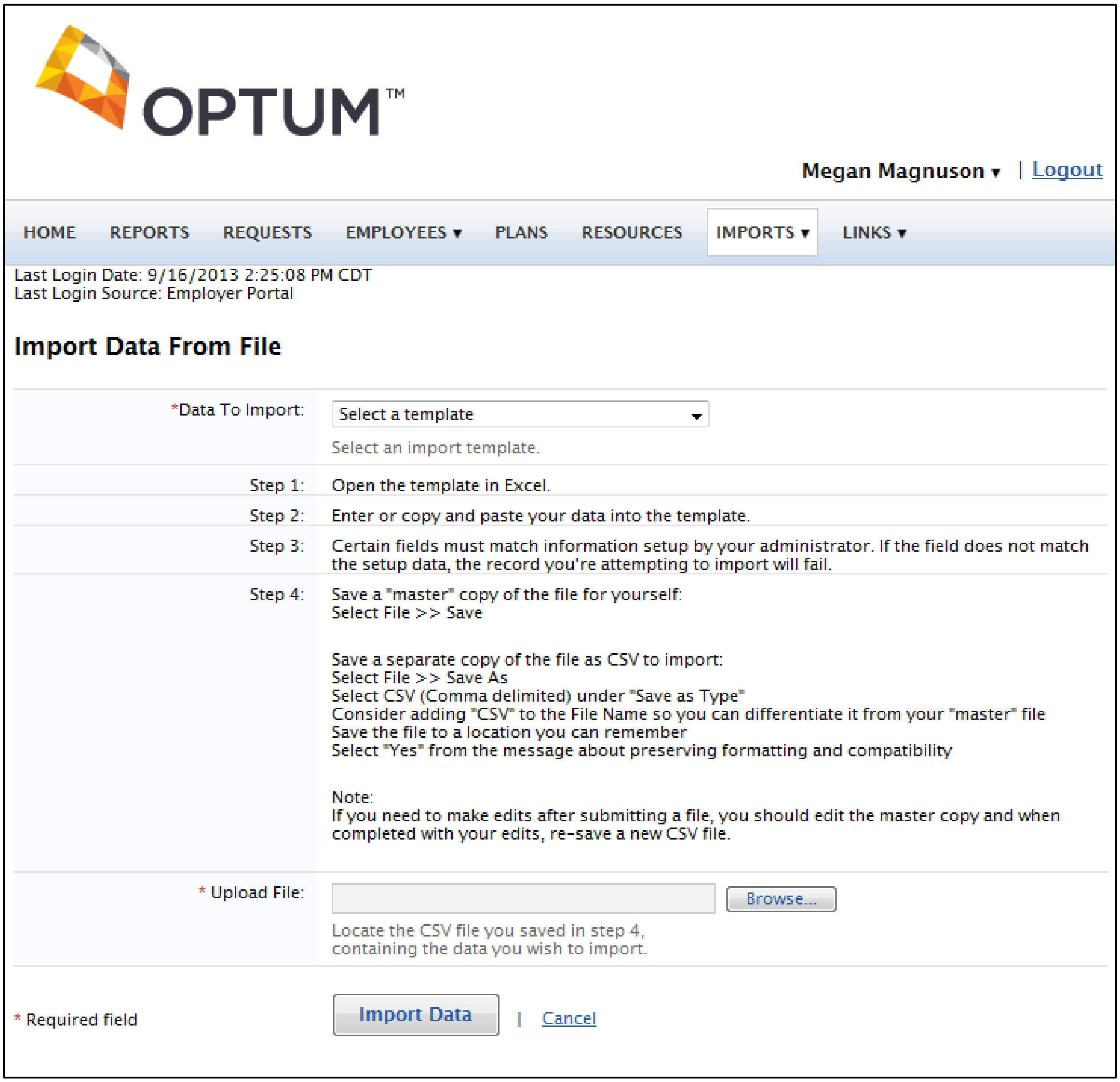


Navigating the Imports Page

By hovering over the **Imports** tab at the top of the screen, you will see shortcuts to access your **Import Queue** and **Import Data**. Some or all of the items shown on the below **Imports** page may not be visible depending on your user access.



If you select **Import Data** or **Import Data from File**, you can upload a file directly. You will first select a template for the type of file you want to upload then follow the steps listed to open the template, enter your relevant data, save a master copy of the file and save a copy as a Comma Separated Values (.csv) file. You will then browse to your file and select **Import Data**.



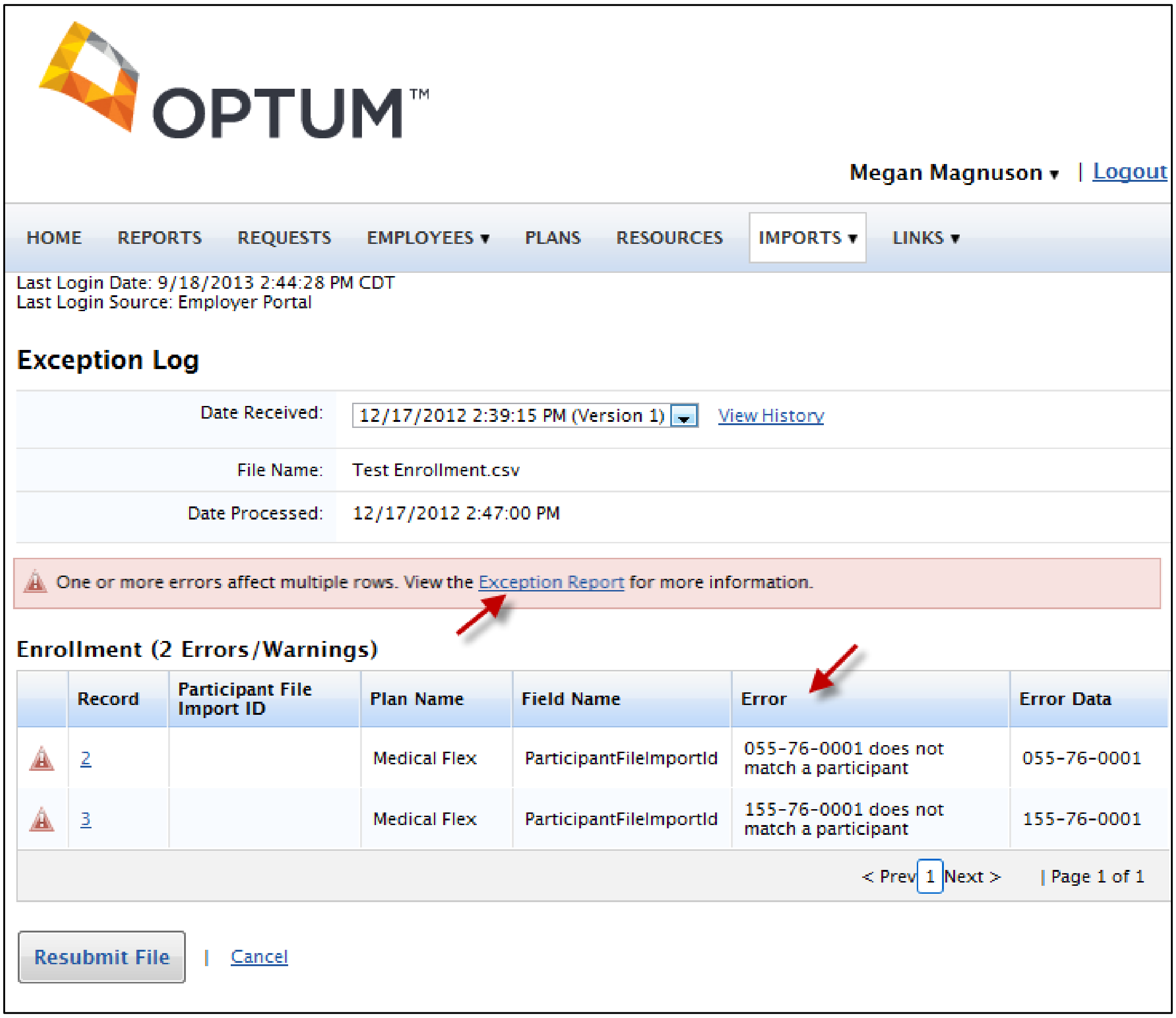
If you click on **Imports** or **Import Queue** you can search your imported file by date or file name and view your **Pending** imports, **Failed** imports, **In Process** imports, or **Completed/Canceled** imports.

You can also **View Errors**, if any, that are associated to a completed file.

Completed / Canceled (6 Files)

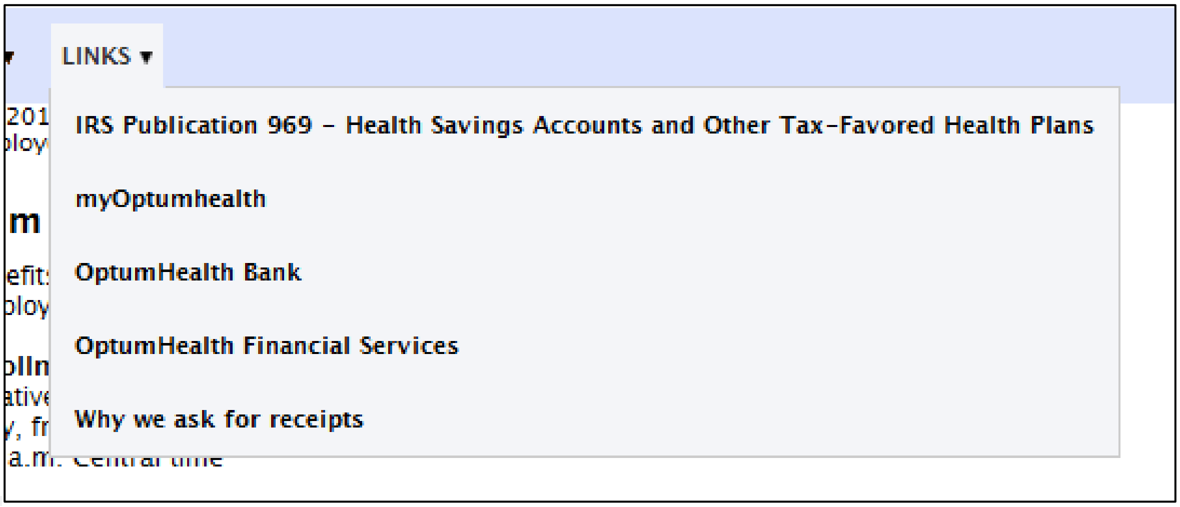
	Date Received	File Name	Status	Failed Records	Actions
	3/26/2013 2:08 PM	TEST Enrollment Template 26Mar2013.csv	Complete	0 of 1	
	3/26/2013 1:49 PM	TEST Demographic Template 26Mar2013.cs	Complete	1 of 1	View Errors
	3/26/2013 1:44 PM	TEST Contribution Template 26Mar2013.cs	Canceled	0 of 0	
	3/26/2013 9:50 AM	TEST Contribution Template 26Mar2013.cs	Complete	1 of 1	View Errors
	12/17/2012 2:39 PM	Test Enrollment.csv	Complete	2 of 2	View Errors
	12/17/2012 2:31 PM	Test ER file.csv	Complete	0 of 2	

This will allow you to review any errors that occurred when uploading the file. If you would like to view more details, you can select the **Exception Report** to export a excel file containing details of any errors that occurred during upload.



Navigating to Links

The **Links** tab provides a direct link to any websites which may be relevant to you or your employees (e.g., IRS Publication 969 and OptumHealth Financial Services website). You can access these links by scrolling over the Links tab at the top of the page and clicking on the individual links.



Contact Us

If you have any questions, please contact OptumHealth at (800)294-6620 or accountservices@optum.com