

ALLEGIANCE ADVANTAGE

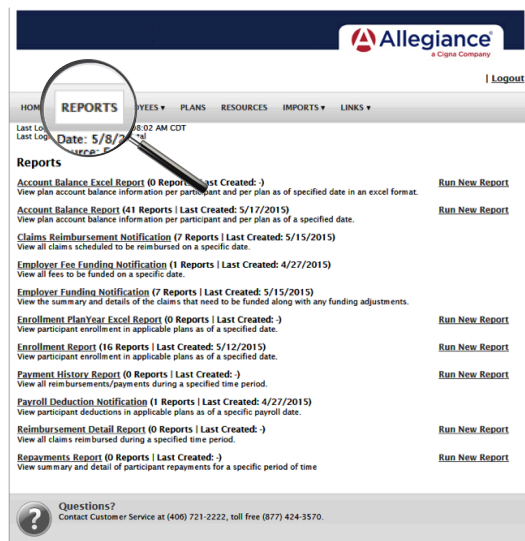
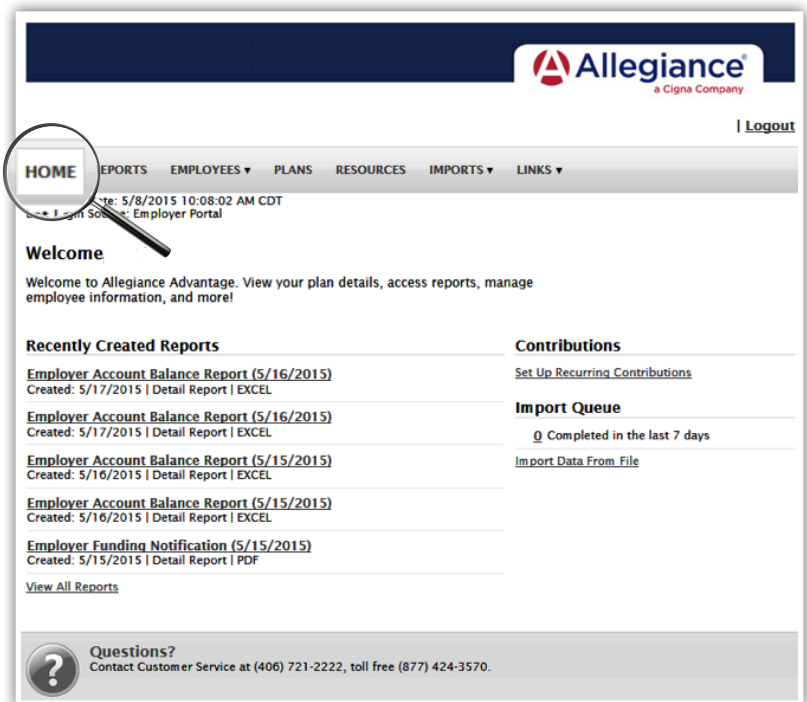
EMPLOYER QUICK START GUIDE

HOW DO I ACCESS THE HOME PAGE?

1. You and your assigned contacts will be sent a username and a temporary password. You may also decide the access rights for each assigned contact.
2. Upon first login, you will be prompted to change the password.
3. Once the password is updated and confirmed, click **Login**.

Everything you need is found on the home page. You will see a history of the reports and notifications with quick links to the latest versions. You can:

- View employee level data
- Check status of file imports
- Read plan documents
- Download forms

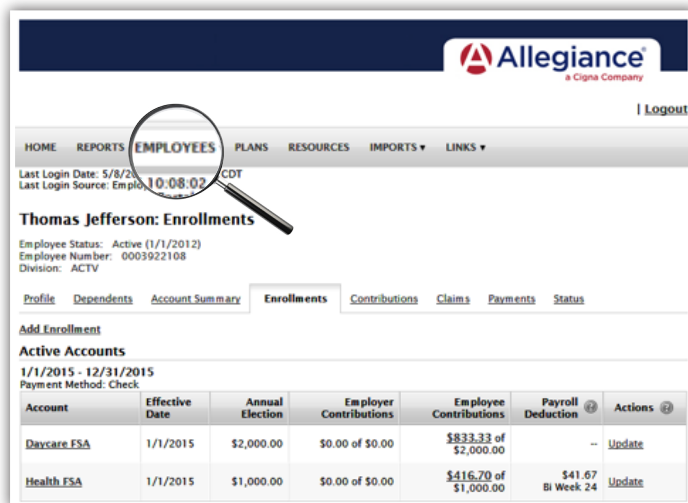


HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. Under the **Reports** tab is a list of all available reports that can be viewed.
2. Select the relevant enrollment, financial, contribution or plan information report you wish to view.
3. If there is a report you need, but do not see, please contact your Allegiance representative to request it.

HOW DO I ADD/ENROLL/UPDATE EMPLOYEES?

1. Locate the **Employees** Tab.
2. Select **Add Employee**.
3. Enter the personal and employment information.
4. Click **Add Employee**.
5. In the confirmation section, click **Add Enrollment**.
6. Select the plan and click **Enroll**.
7. Enter the effective date and election/employer contribution.
8. Click **Add Enrollment(s)**.



Allegiance
a Cigna Company

HOME REPORTS **EMPLOYEES** PLANS RESOURCES IMPORTS LINKS

Last Login Date: 5/8/2017 10:08:02 CDT
Last Login Source: Employer Portal

Thomas Jefferson: Enrollments

Employee Status: Active (1/1/2012)
Employee Number: 0003922108
Division: ACTV

Profile Dependents Account Summary **Enrollments** Contributions Claims Payments Status

Add Enrollment

Active Accounts
1/1/2015 - 12/31/2015
Payment Method: Check

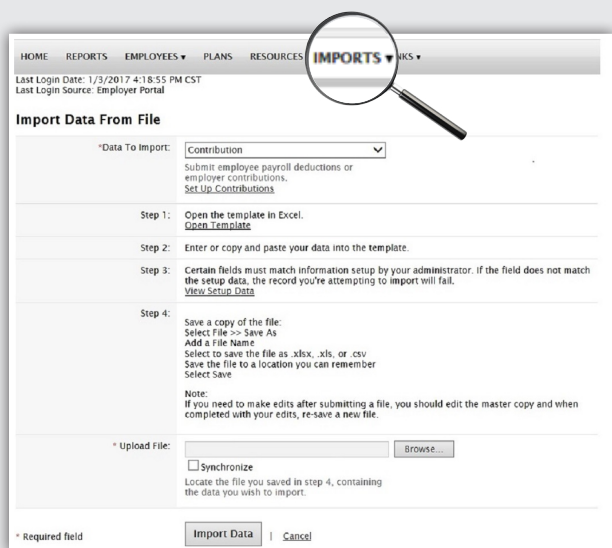
Account	Effective Date	Annual Election	Employer Contributions	Employee Contributions	Payroll Deduction	Actions
Daycare FSA	1/1/2015	\$2,000.00	\$0.00 of \$0.00	\$833.33 of \$2,000.00	--	Update
Health FSA	1/1/2015	\$1,000.00	\$0.00 of \$0.00	\$416.70 of \$1,000.00	\$41.67 Bi Week 24	Update

HOW DO I ACCESS MY PLAN INFORMATION?

1. Under the **Plans** tab, you will find options to view the same information as the employees for all active and inactive plans.
2. Information available includes:
 - Plan summaries
 - Plan details and rules
 - Documents

HOW DO I ACCESS FORMS?

1. Under the **Resources** tab, you can download and print forms and access any other documents or custom materials.



HOME REPORTS EMPLOYEES PLANS RESOURCES **IMPORTS** LINKS

Last Login Date: 1/3/2017 4:18:55 PM CST
Last Login Source: Employer Portal

Import Data From File

*Data To Import: Contribution
Submit employee payroll deductions or employer contributions.
Set Up Contributions

Step 1: Open the template in Excel.
Open Template

Step 2: Enter or copy and paste your data into the template.

Step 3: Certain fields must match information setup by your administrator. If the field does not match the setup data, the record you're attempting to import will fail.
View Setup Data

Step 4: Save a copy of the file:
Select File >> Save As
Add a file name
Select to save the file as .xlsx, .xls, or .csv
Save the file to a location you can remember
Select Save

Note:
If you need to make edits after submitting a file, you should edit the master copy and when completed with your edits, re-save a new file.

* upload File:

Synchronize
Locate the file you saved in step 4, containing the data you wish to import.

* Required field

ONE OF THE FEATURES OF THE PORTAL IS THE ABILITY TO IMPORT DATA.

HOW DOES THAT WORK?

1. Under the **Imports** tab, you can import contribution files directly into the portal using standard CSV formatted files.
2. Once in the Imports home page, select the type of data to be imported.
3. Open the template in excel.
4. Enter or paste your data into the template.
5. Check for field matches by viewing setup data. Contribution date must be your actual payroll date
6. Save as a CSV to a location you will remember.
7. Upload the file.

Of course, you can call us at 1-877-424-3570 and ask to speak to your account specialist with any questions.

Once imported, any errors will be displayed and can easily be updated from the **View Errors** button. Clicking on the record number allows you to correct the error. Then, click **Queue Record** and the correction is made. You can then resubmit the file to import the corrected records.