PROFICIENT®
BENEFIT SOLUTIONS

Navigating your *NEW* Employer Portal

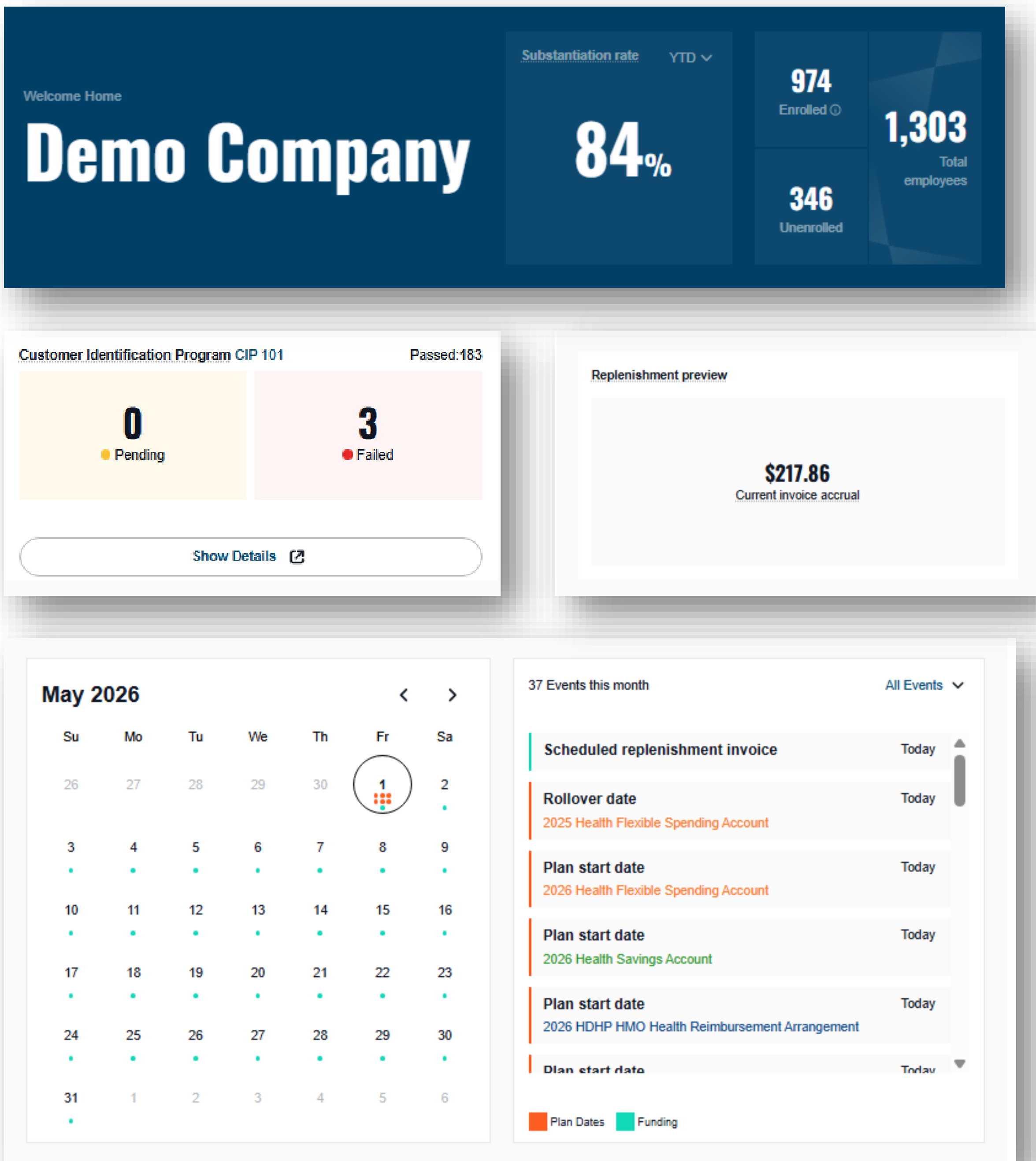
employers.proficientbenefits.com

5.2026

Employer Dashboard

Log into your Employer portal at https://employers.proficientbenefits.com/

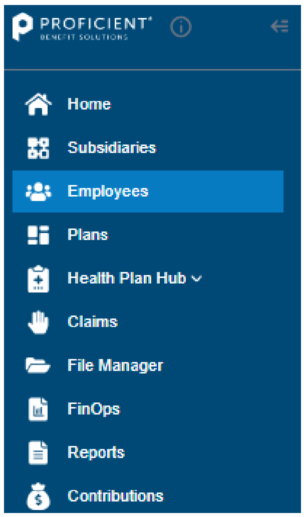
Your first stop is the Employer Dashboard, providing an at-a-glance view of key plan metrics, including FSA auto-substantiation rates, enrollment counts, and CIP status for HSA participants. You'll also have quick access to the CIP report to review details for participants who have not passed CIP, along with visibility into important dates such as plan funding and plan start dates.



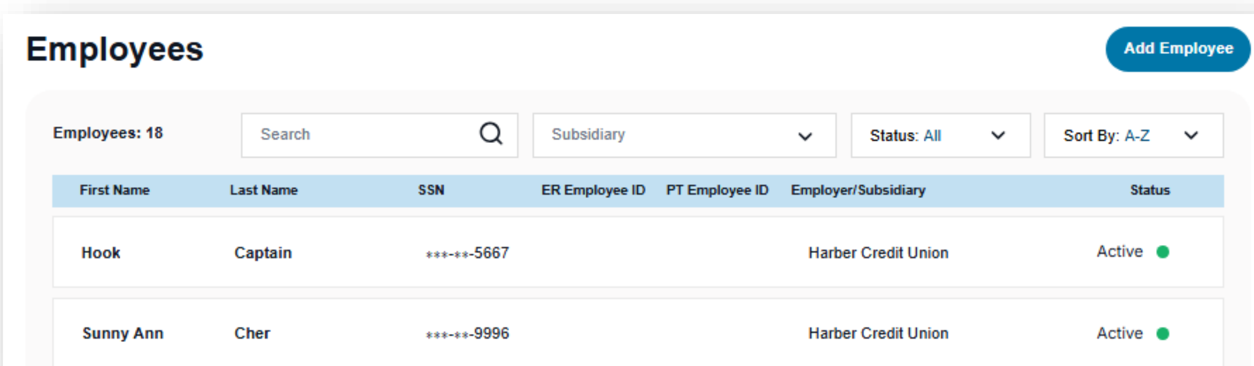
Find an Employee

The Employer Portal gives you the ability to manage employee enrollments, demographics, debit cards, and more. With the exception of claim provider details, you have full transparency into participant profiles and enrollment data.

1 Select **Employees** from Main Menu



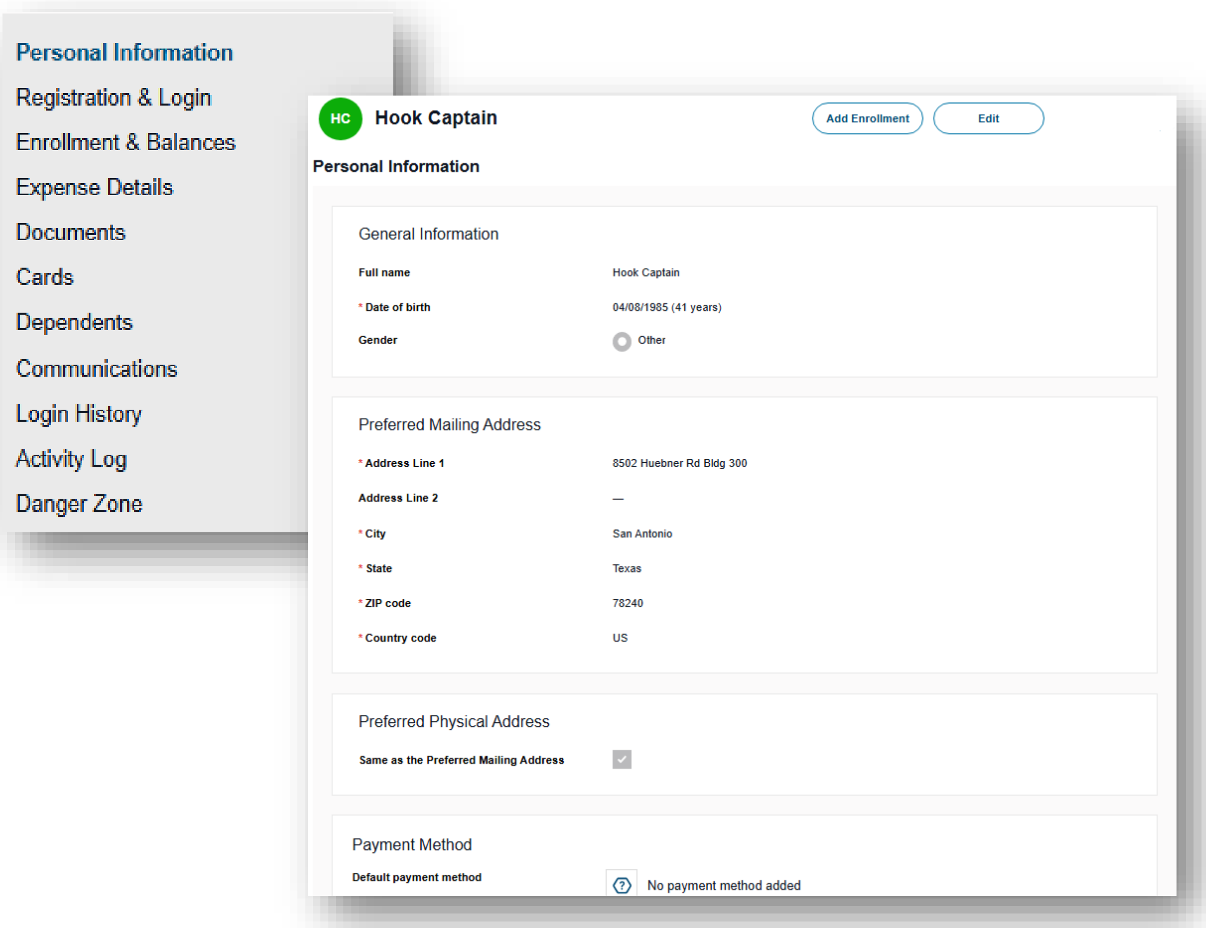
2 Use the Search box to look for an employee. You can use 3 or more letters or numbers. Click on the first or last name to open their profile



3 Click on the section you want to visit OR just scroll down the profile to get to each section.

Highlights:

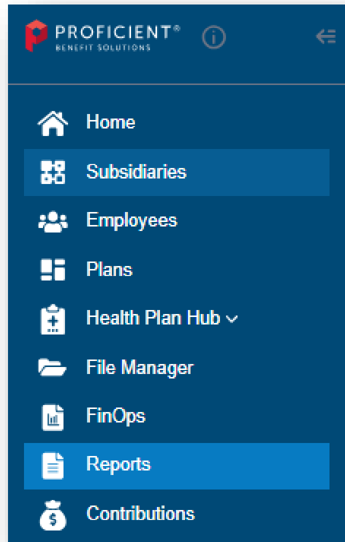
- Click **Edit** to update **Personal Information** such as Demographics, Status (Active, Terminated, Retired, COBRA) and Status Effective Date
- **Visit Enrollments** to view elections. You can click on the enrollment record, and you'll find another option to Edit Enrollment where you can update election amounts, per pay period amounts, and update the enrollment status (Active or Cancel)
- **Visit Cards** to manage a current card or order a new card
- Visit **Expense Details** to find transactions that Need Help (provider details are not available to Employer)
- Visit **Communications** to view emails sent to the participant



Reports

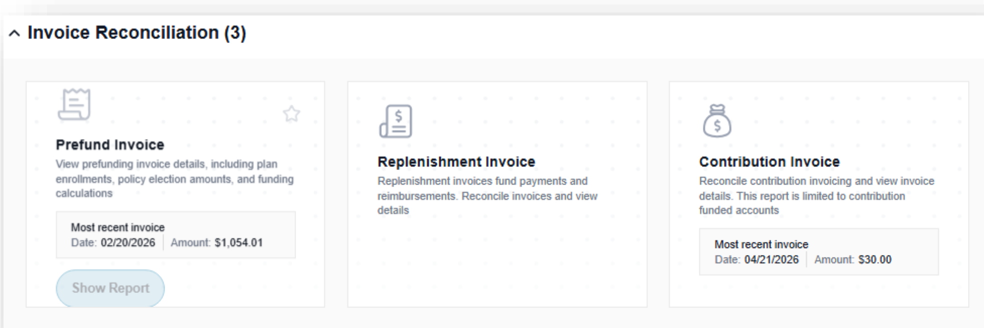
The Employer Portal provides access to comprehensive reporting, giving you full visibility into the financial data needed to reconcile ACH activity, participant reports to monitor plan utilization and spend, and other key participant insights.

1 Select **Reports** from Main Menu



2 Invoice Reconciliation Reports are the first available in the Reporting Dashboard. These reports allow you to reconcile your financial activity

- **Prefund Invoice** is where you will find reporting for any prefund required to protect your plan(s) from deficit spending.
- **Replenishment Invoice** is where you will find reporting for any daily, weekly, or monthly ACH activity that is initiated to fund claims paid in the prior day, week, or month. Primarily for FSA, HRA, Wellness, Commuter, and Lifestyle Accounts
- **Contribution Invoice** is where you will find reporting for any Contributions posted that triggers ACH activity to fund your plan, primarily for FSA and HSA.



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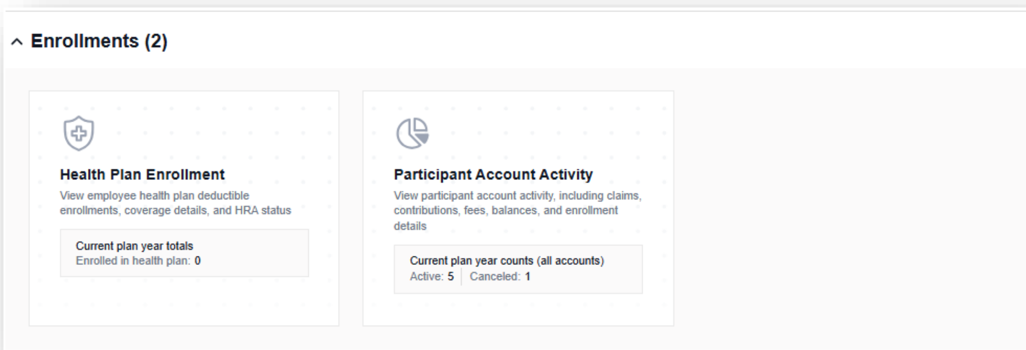
Enrollments Reports allow you to view your participant enrollments and monitor the health of your plan with details like claim spend, year to date contributions and more.

- **Health Plan Enrollment** is for Health Reimbursement Arrangement plans that have a deductible tracker.
- **Participant Account Activity** is for ALL plan types. You are able to filter enrollments by plan year and plan type(s). And download the report in CSV. View important details like elections, claim spend, contributions, and more!



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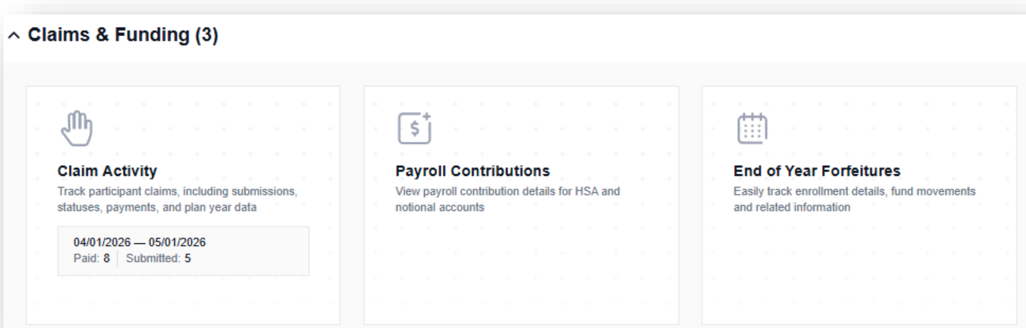
Claims & Funding reports allow you to view claim activity, payroll contributions posted, and End of Year Forfeitures (plan year closeouts).



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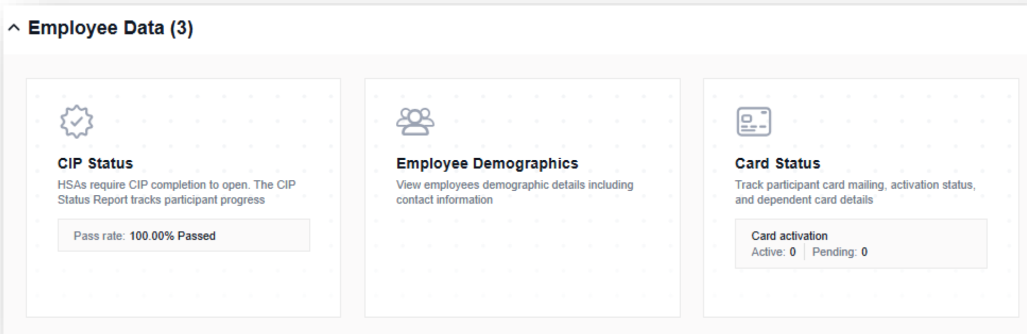
Employee Data reports allow you to view CIP Status, Employee Demographics, and Card Status for ALL employees! Easier than looking your employees up individually!



Contact Us

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Forms and other helpful participant resources are available at https://proficientbenefits.com/forms.