

Employer Web Portal Tools

NBS Web Portal

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► Features of the portal

- Interact with balances, summaries, and highlights of all your benefit accounts
- Get transaction history showing all deposits and payments of each account
- Stay up-to-date with announcements and communication from both NBS and your plan sponsor
- View and download reports for each benefit with NBS

► Get to the website

- Using your Internet browser, navigate to: <http://employer.nbsbenefits.com>
- Use the User ID and Password provided to you by NBS. Should you need new login information please contact your NBS Account Manager.

Self-Service Login

Please enter your User ID & Password below to access your secure account.

User ID:

Password:

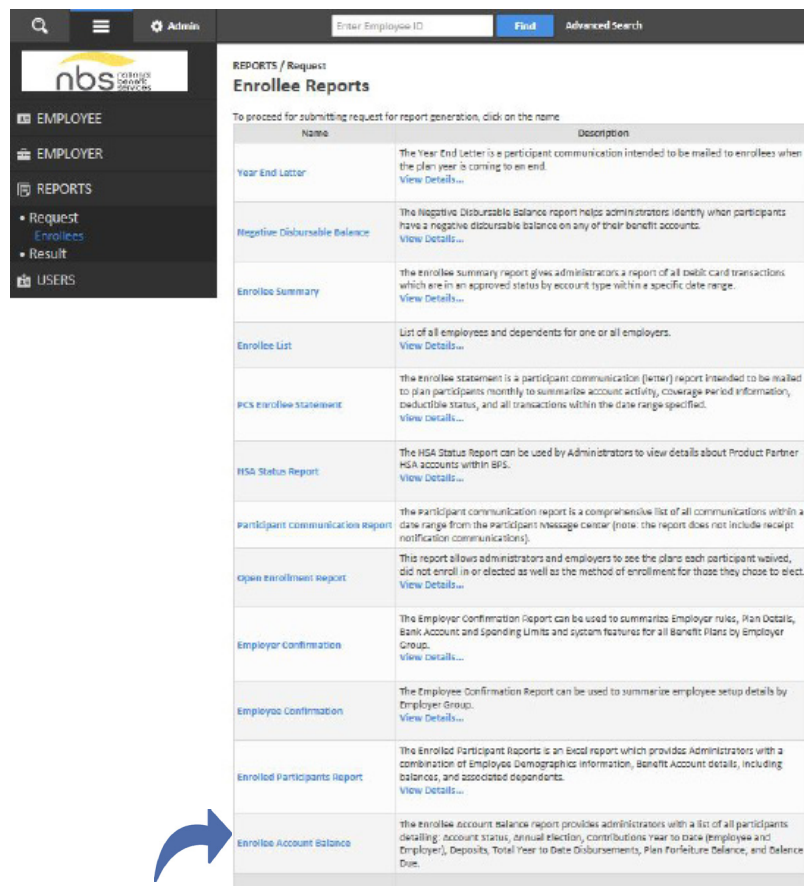
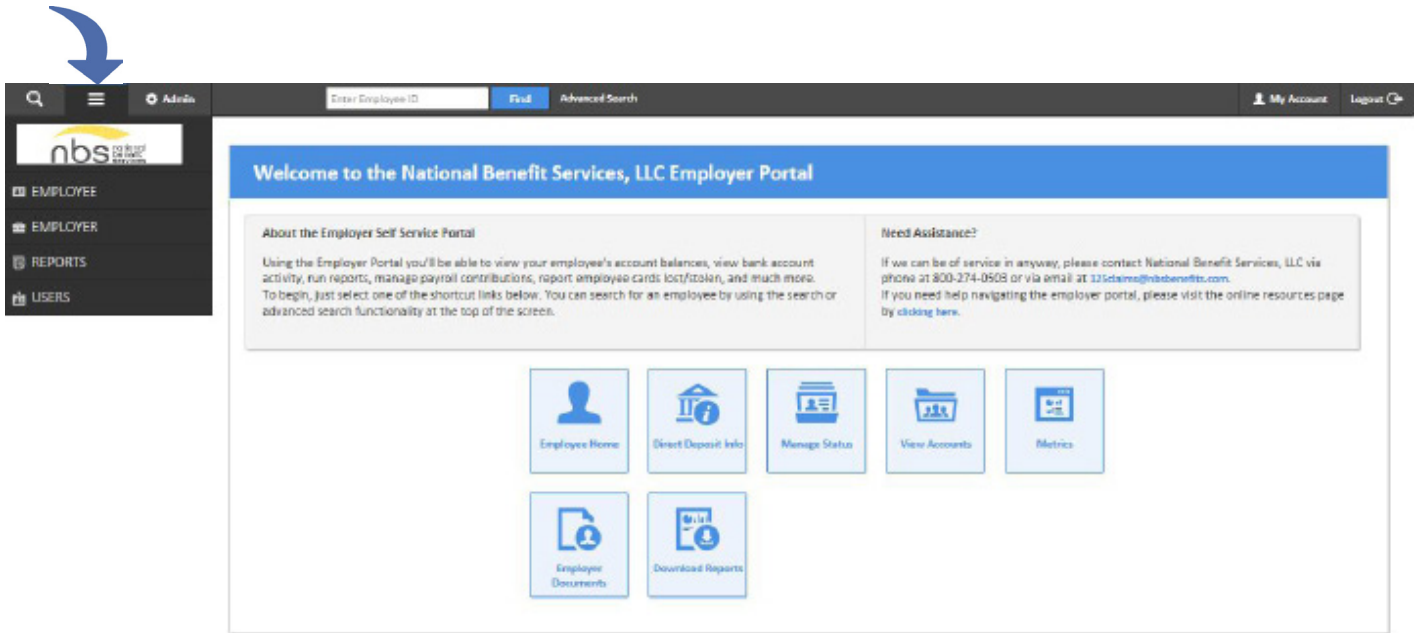
Login

Please note the following:

- Your administrator must create an account for you prior to your first login.
- If you've forgotten your password, please contact your designated Administrator to have your account password reset.
- The application is best viewed at 1280x800 resolution or greater.
- If you have popup blockers installed, you will need to disable them to use the Self-Service Portal.

▶ Generating Reports

- Click on Reports, then choose the report you wish to view. (*Enrollee Account Balance is the report used the most by Employers*)



▶ Reports Continued:

- Once you choose the report click "Generate". You will then click "Results" under reports

The screenshot shows the 'Enrollee Summary Report' generation interface. At the top, there is a search bar with 'Enter Employee ID' and a 'Find' button. Below this, the form is titled 'Enrollee Summary Report' and contains several fields: 'Admin' (National Benefit Services, LLC), 'Employer' (NBS Demo Employer Test), 'Account Type' (All), 'Start Date' (4/6/2016), 'End Date' (4/6/2016), 'Sort By' (EmployeeID), 'Template' (Enrollee Summary Standard Template), 'Format' (PDF), 'Alert Mode' (Email), and 'Mask Cardholder ID' (checked). Below the form are 'Report Delivery Options' including 'Email' and 'FTP' checkboxes, and fields for 'Email address of recipient*' and 'Email address of sender*'. A 'Generate' button is at the bottom, with a note '*Field is required.' below it.

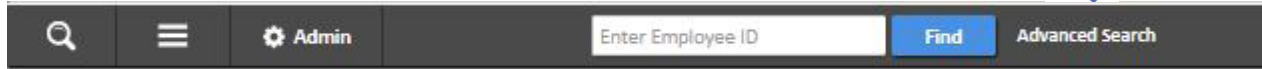
The screenshot shows the 'Requested Reports Status' page. On the left is a sidebar navigation menu with the NBS logo and options for 'EMPLOYEE', 'EMPLOYER', 'REPORTS', and 'USERS'. A blue arrow points to the 'REPORTS' section, which is expanded to show 'Request' and 'Result' options. The main content area is titled 'REPORTS / Result Requested Reports Status' and contains search filters for 'Admin', 'Employer', 'Report Category', 'Request From Date', 'Request To Date', 'Report Name', and 'Status'. Below the filters is a table with columns: Report Name, Status, Requested Date, Format, Admin ID, Employer Name, Next Type, ID, Report Dates, Viewed, and Delivery Method. The table contains one entry: 'Enrollee Summary' with status 'Processing', requested date '4/6/2016 12:09:17 PM', format 'PDF', admin ID 'T01224', employer name 'NBS Demo Employer Test', next type 'ALL', ID 'All', report dates '4/6/2016 - 4/6/2016', and delivery method 'Download'. A 'Delete' button is at the bottom.

Report Name	Status	Requested Date	Format	Admin ID	Employer Name	Next Type	ID	Report Dates	Viewed	Delivery Method
Enrollee Summary	Processing	4/6/2016 12:09:17 PM	PDF	T01224	NBS Demo Employer Test	ALL	All	4/6/2016 - 4/6/2016	N/A	Download

- When the report is generated it will show up in the results screen. Click on the report you would like to see, and it will appear in a separate window. (It may take a few minutes for the report to generate.)

▶ Searching for an Employee

- Click "Advanced Search" in the header



- In Advanced Search you can enter the employee's information or click "search"

Search Employees
Advanced Search:

Note: The maximum number of employees returned by the system is 2000. To find an employee, it is highly recommended to enter search criteria filters.

Admin:

Employer: List All [?](#)

Plan Year:

Benefit Plan:

Division:

Employee Status: New Active Permissive Tempinactive Terminated

First Name*:

Last Name*:

Employee ID:

Card Number:

SSN:

Product Partner Account Number:

*Please enter the complete full name OR ONLY the FIRST letter of the name. Search based upon partial names greater than one letter is not supported.

- Select the Employee you would like to view
- View Employee's information including balances, claims, dependents listed under the account, and who has a debit card under the account.

Employee

Admin: National Benefit Services, LLC	Employer: NBS Demo Employer	Employee ID: 00000001	Employee: Demonstration, John
Employee Status: New	Employee Status: Active	Eligibility Date:	Term. Date:
User ID: eedemo	SSO User ID: 0012242760804	Enter Claim	Enter Deposit
Marketplace User Id:			

Dependents

Accounts

Plan Year:

ACCOUNTS

Type	Plan Date	Plan Id	Annual Election	Contrib YTD	Other Deposits	Disb YTD	Avail Bal	Preauth	Disb. Bal	Balance Due	
FSA	Start: 1/1/2014 End: 12/31/2014	FSA	\$2,500.00	\$0.00	\$0.00	\$0.00	\$2,500.00	\$0.00	\$2,500.00	\$0.00	New
DCP	Start: 1/1/2014 End: 12/31/2014	DCAP	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	New
Balance Due Total										\$0.00	2 Acct

**For more information,
please call
(800) 274-0503**