



Upcoming FSA Online Open Enrollment

The Open Enrollment period for your FSA is November 1st – November 16th

Open enrollment will end at 9:00 PM PST on the date shown.

To begin your enrollment, you will need to navigate to the PacificSource Administrators secure web portal:

<https://hrbenefitsdirect.com/PSA/signIn.aspx>

- **Prior Participants:** If you have previously participated in the FSA account, your PacificSource Administrators Member ID and date of birth are set as your default username and password (unless you have changed them). Please refer to the Member guide for instructions on enrolling in the FSA. If we have an email on file, you will receive an email on 11/1/2018 from PacificSource Administrators with login information. If you did not receive an email or you don't remember your member ID or password, please call the PacificSource Administrators Customer Service Team at: (800) 422-7038 and they will assist you with this information.
- **Deschutes County New Participants:** If you have never participated in the FSA account, select the link that is directly under "Never Been Enrolled" which is named "Click Here to Create a New Member." Use **DC2019FSA** as the Group Pass Code and select Add New Member to set up your profile.
- **Central Oregon Intergov Council New Participants:** If you have never participated in the FSA account, select the link that is directly under "Never Been Enrolled" which is named "Click Here to Create a New Member." Use **COIC2019FSA** as the Group Pass Code and select Add New Member to set up your profile.

Please refer to the Member guide for step by step instructions for creating your profile and enrolling in the FSA.

Retain the username and password that you create during this process as this will continue to be your MyFlex login.

The following FSA plans are available through your employer;

- **Health Related Expenses (HRE):** Healthcare expenses that are either not covered or only partially covered by your insurance plan can now be paid pretax. Examples include deductibles, copays, dental expenses (even orthodontia), prescriptions and vision care. The maximum deduction for 2019 is \$2,650.
- **Dependent Care Expenses (DCE):** Child care and elder care expenses you incur while at work or school may be deducted from your paycheck before tax. The maximum deduction for 2019 is \$5,000.

The Benefits Card: A special-purpose MasterCard® that draws on the value of your annual FSA election amount. It gives you an easy, automatic way to pay for qualified healthcare expenses not covered by your health insurance. It is important to retain your paperwork, such as your insurance carrier's Explanation of Benefits or itemized receipt as we may request documentation to confirm that the products or services are medically necessary.

Note: Cards will automatically be ordered for new HRE electing participants.

For additional information including forms and materials, a list of eligible expenses, FAQ, and more please visit:

<http://psa.pacificsource.com/Flex/>



MyFlex

Member Online Enrollment

Enroll in the FSA through the MyFlex Website

Member Online Open Enrollment through the MyFlex website enables you to enroll in the FSA plans that are offered by your employer and submit your elections electronically, eliminating the need to complete a paper form at the start of each new plan year.

To begin, navigate to the PacificSource Administrators secure web portal:

<https://hrbenefitsdirect.com/PSA/signIn.aspx>

Renewing Members – Logging in

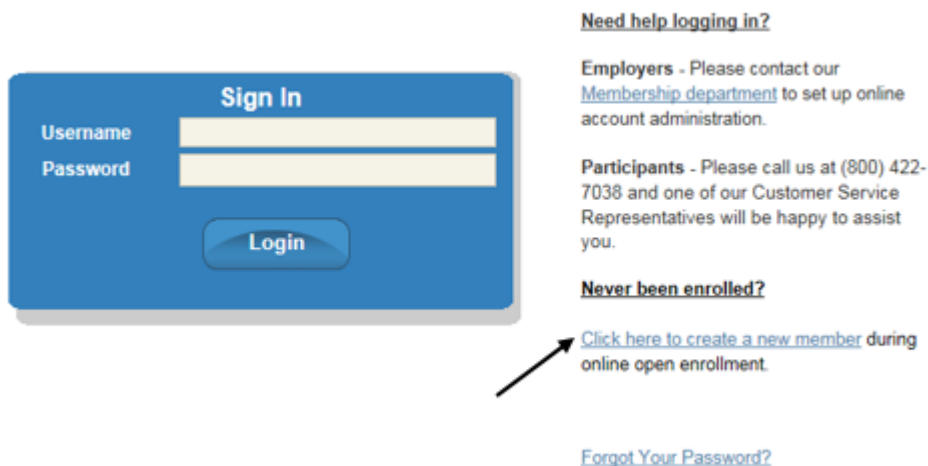
If you have previously participated in an FSA, HRA or Transportation account, your PacificSource Administrators Member ID and Date of Birth (MM/DD/YYYY format) are set as your default username and password. If you have changed your username or password from the default, please log in with the updated information. If assistance is needed logging in, please contact Customer Service at (800) 422-7038.

Note: You may be prompted to enter / confirm your email, change your username and password, and set up security questions.

Please skip to page 4, **Renewing and New Members – Enrolling in a Plan**, to complete the Online Open Enrollment process.

New Members – Logging in

1. If you are a new flexible spending account member select the “**Click here to create a new member**” link.



If you have questions regarding the online enrollment process, please contact Customer Service at (800) 422-7038 or psacustomerservice@pacificsource.com

Member Online Enrollment

- 2. Enter the pass code that was provided by your Human Resources department and select **Next**.
Note: The pass code is not case sensitive.

Group Pass Code Steps: 1 2 3 4 5 6

Enter Your Group Passcode: *

- 3. Check mark the box to verify that this is the correct Group and select **Next**.
Note: If this is not your Employer, please contact a PSA Enrollment Representative at (541) 225-2761 or psaenrollment@pacificsource.com

Verify Group Steps: 1 2 3 4 5 6

The Group Passcode you entered corresponds to the following Group:

_ TRAINING COMPANY

Please verify that this is the correct Group and click the check box below to proceed

I verify that this is the correct Group

- 4. Enter the required fields (*). If you do not know your Employment Start Date, enter your FSA effective date (plan year start date) and select **Next**.

First Name: *	Last Name: *
<input type="text"/>	<input type="text"/>
	Middle Initial:
	<input type="text"/>
Employment Start Date: *	Date of Birth: *
<input type="text"/>	<input type="text"/>

- 5. Enter the required fields (*) and select **Next**.

Address 1: *	Address 2:
<input type="text"/>	<input type="text"/>
City: *	State: *
<input type="text"/>	<input type="text" value="--Select One--"/>
Zip Code: *	
<input type="text"/>	

Zip Code must be formatted as xxxxxx or xxxxx-xxxx.

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6. Enter the required fields (*) and select **Next**.

Note: The username and password that you create in this process is your web username and password and will continue to be your MyFlex login unless you change it a later date.

The screenshot shows a registration form with the following fields:

- User Name:** * (required), with a help icon. Below the input field is the text: "Usernames must be between 4 and 15 characters long."
- Password:** * (required), with a help icon.
- Confirm Password:** * (required). Below the input field is the text: "Please check password requirements."
- Security Questions:** * (required). Two dropdown menus are shown:
 - What was the model of your first car?
 - What city were you born in?

7. Enter your email address and select **Finish**.

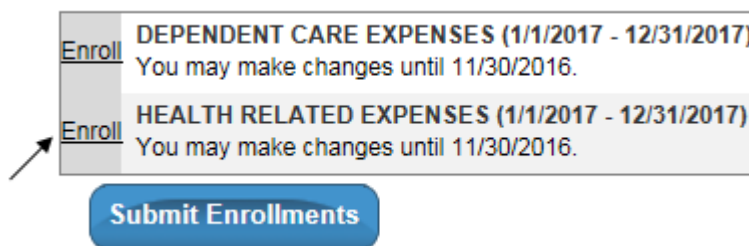
The screenshot shows a single input field with the label "Enter Your Email Address: *".



Renewing and New Members – Enrolling in a plan

1. On the Home page, select the link **Enrollment is open until MM/DD/YYYY. Click here to enroll now.** Open enrollment will end at 9:00 pm PST on the date shown.



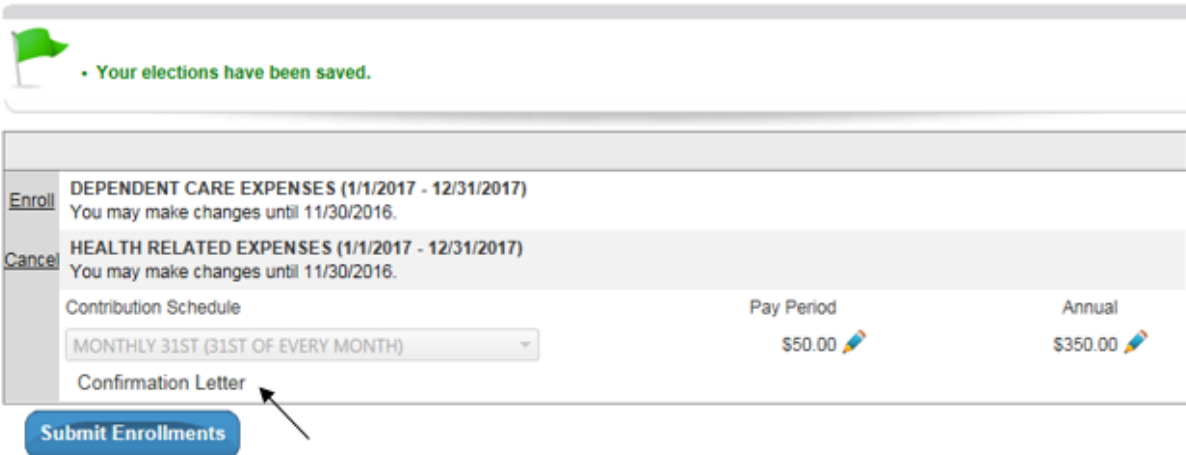
2. Select the **Enroll** link for the plan(s) that you would like to enroll in.



3. Select the pencil icon  and enter the Pay Period or Annual amount desired.
4. Select the calculator icon  to auto-calculate the other. (Example; if you enter a pay period amount, the calculator will calculate and populate the annual amount, and vice versa.)

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5. Select **Submit Enrollments** to complete. Your elections have been saved message appears. The information will be transmitted to your employer for approval. If we have an email on file, you will receive an Open Enrollment Confirmation email.



- You can print a Confirmation Letter by selecting the link.
- You will continue to see the open enrollment message displayed on your home page until 9:00 PM PST on the last day of open enrollment. During the open enrollment period, you may change the amounts that you wish to elect. Once open enrollment has ended, you will no longer have access to make election changes online.

Enrollment Changes

To change an amount during the open enrollment period, login to MyFlex and select the “Enrollment is open until MM/DD/YYYY” link. Use the pencil and calculator icons to edit the amounts. Select **Submit Enrollments** to save.

***To remove an election** amount during the open enrollment period, login to MyFlex and select the “Enrollment is open until MM/DD/YYYY” link. Select the **Cancel** link, to the left of the plan, and select **Submit Enrollments** to save. This will update the election to zero.

****It is important to select the Cancel link in order to remove the election. Changing the amount to zero and selecting Submit Enrollments will not cancel the original amount that was entered.***

Profile Changes

Select the **Profile** tab to update your personal data, add or change EFT information, and change your username and password.

Note for New Members: The “web” Member ID number you see in your profile screen is only temporary. Once open enrollment has ended and your enrollment has been approved by your employer, you will be assigned a permanent PacificSource Administrators ID number, which you will receive in the mail.

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