



# BASIC FSA, HRA and HSA Administration

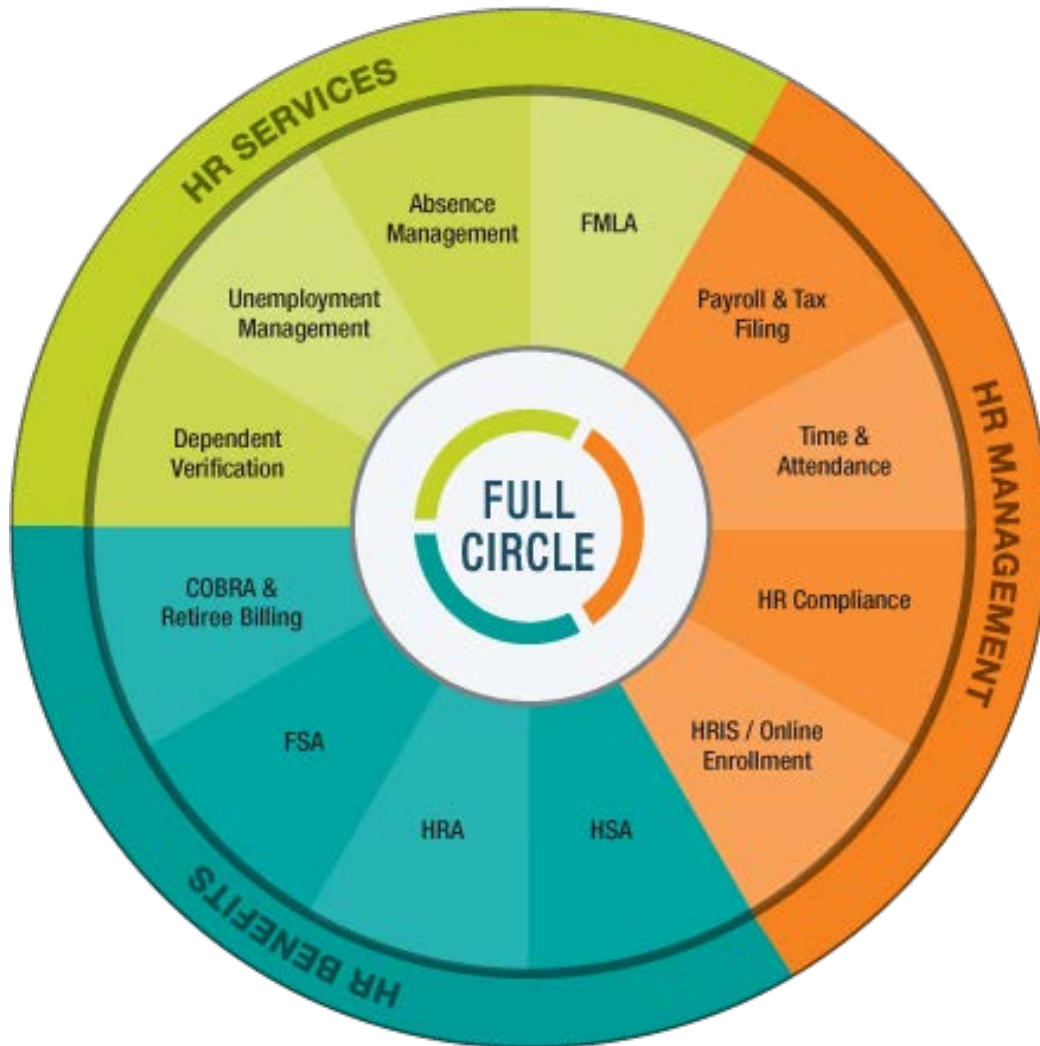
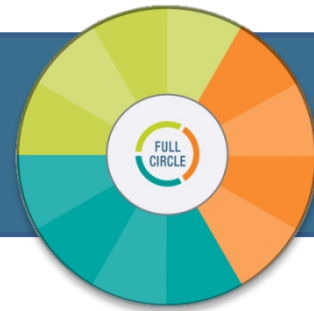
Presented by: David George, Regional Director



- HR Benefits
- HR Management
- HR Services

We're proud to offer a full-circle solution to your HR needs. BASIC offers collaboration, flexibility, stability, security, quality service and an experienced staff to meet your integrated HR, FMLA and Payroll needs.

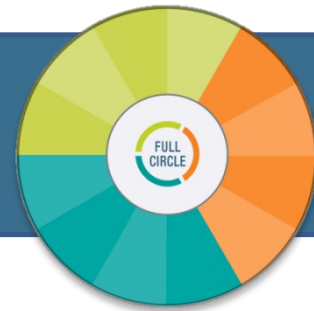
# HR Solutions Come Full Circle



HR solutions should be simple.  
**Keep it BASIC.**

BASIC's integrated HR solutions come full circle for employers nationwide. Consistently recognized as an Inc. 5,000 Fastest Growing Private Company, our expertise allows you to control costs, manage risks and improve staff focus and effectiveness.

# Flexible Spending Account



Payments & Notifications Profile



**I Want To...**

[File A Claim](#)

**Available Balance**

2016 Medical Reimbur... **\$915.00**

2016 Dependent Care... **\$183.00**

2016 Transit Reimbur... **\$2,118.52**

**Welcome**

We're Making it Easy to Manage Your Healthcare Expenses [View More](#)

**Message Center** 1

! 1 repayment(s) totaling \$4.00 due for paid claims that were later denied

**Quick View**

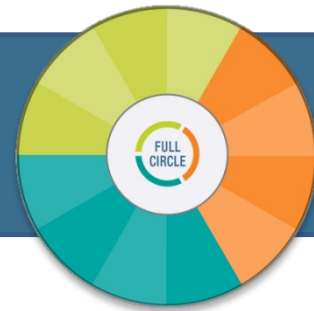
**Paid Claims By Category**

Category	Amount
Child	\$505.00
Medical Services	\$75.00
Unspecified	\$6.00
Dental	\$14.00

**Election Summary**  
01/01/2016-12/31/2016

Category	Amount
2016 Dependent Care Account	\$500.00
2016 Transit Reimbursement	00.00
Medical Reimbursement	00.00

# Multiple Participant Account Access



BASIC has made it easy for all types of participants to access their funds

Mobile App

Online Account

Live Customer Service

Secure Claims Upload

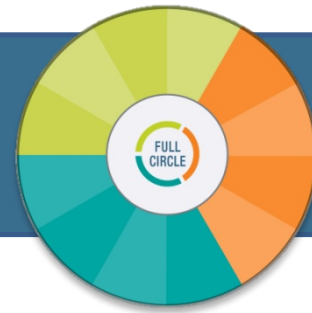
Toll Free Fax

Debit Card

Participant Notification



# Participant Experience



## Claims Submission

- Fax
- Secure Upload
- Mail
- Mobile App

## Claims Turnaround

- 2 business day turnaround
- Mail or email communication on status

## Payments

- Debit Card
- Direct Deposit
- Check

# Included Debit Card



## BASIC Provided Debit Card

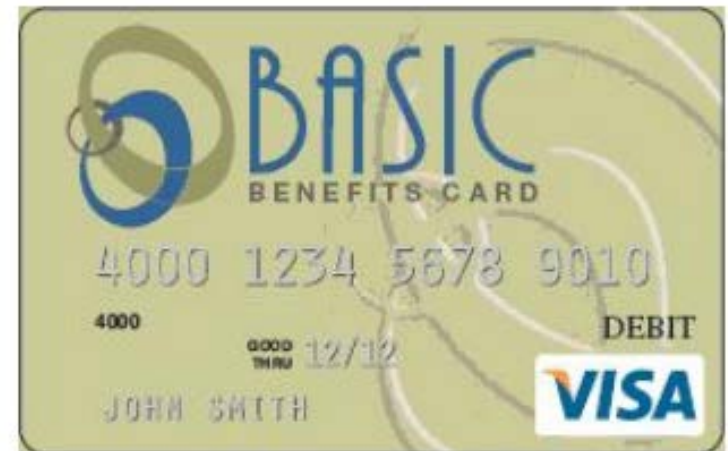
Pay at the  
Point of Sale

2 Cards  
Provided

85% Auto  
Adjudication  
Rate

Re-occurring  
Expenses

Timely  
Notifications



# Advanced Participant Technology



Mobile App

- Easy Account Access
- Secure Claims Upload
- Debit Card Notification
- Payment Notification





# Participant Online Access



Online Access

- Account Balances
- Notifications
- Payment Information
- Claims Upload
- Update Demographic Info
- Prior Year History

Home | Dashboard | Accounts | Tools & Support | Statements & Notifications | Profile

**I Want To...**

[File A Claim](#)

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2016 Dependent Care...	\$183.00
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**Paid Claims By Category**

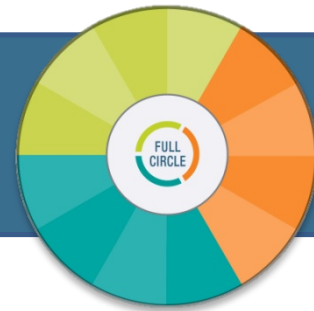
Category	Amount
Child	\$505.00
Medical Services	\$110.00
Dental	\$75.00
Unspecified	\$8.00

**Election Summary**  
01/01/2016-12/31/2016

Category	Amount
2016 Dependent Care Account	\$500.00
Medical Reimbursement	\$0.00
2016 Transit Reimbursement	\$0.00



# Employer Access



Online  
Access

Multiple  
Reports

Notifications

Check  
Register

Participant  
Account  
Access

Eligibility  
Management

[HOME](#) [REPORTS](#) [REQUESTS](#) [EMPLOYEES ▼](#) [PLANS](#) [RESOURCES](#) [LINKS ▼](#)

Last Login Date: 9/14/2016 12:53:59 PM CDT  
Last Login Source: Employer Portal

## Welcome, CS

Welcome to your benefits administration solution. View your plan details, access reports, manage employee information, and more!

### Recently Created Reports

[Claims Reimbursement Notification \(N/A\)](#)

Created: 9/7/2016 | Detail Report | EXCEL

[Employer Contributions Notification \(9/2/2016\)](#)

Created: 9/2/2016 | Detail Report | PDF

[Employer Payment History Report \(8/1/2016 - 8/31/2016\)](#)

Created: 9/2/2016 | Detail Report | PDF

[Employer Contributions Notification \(9/1/2016\)](#)

Created: 9/1/2016 | Detail Report | PDF

[Employer Account Balance Report \(8/31/2016\)](#)

Created: 9/1/2016 | Detail Report | PDF

[View All Reports](#)



# Employer Perks



Plan Document

SPD

Non-Discrim Testing

Account Manager

Enrollment Resources

Open Enrollment Wizard



# Health Reimbursement Arrangement



100%  
Employer  
Funded

Flexible  
Design

Pair with FSA

Online Tools

Account  
Manager

Plan Docs

# Participant Experience



Quick Claims  
Processing

Secure Claim  
Upload

Coordination  
with FSA

Online Tools

Debit Card  
with certain  
plan design

Customer  
Support

# Any Bank? Yes, Any Bank!

Need help setting  
up their first  
HSA Account



Would like to fund  
their existing HSA  
Account



Would like their  
HSA Account at a  
specific bank



# @AnyBank

Need help setting  
up their first HSA  
Account



Would like to fund  
their existing HSA  
Account



Would like their  
new HSA Account  
at a specific bank





# Benefits of @AnyBank

- Complete portability
  - Change carriers
  - Employee changes employers
- Provide a benefit without the hassle of owning and managing HSA accounts.
  - The employer's role is simplified to depositing contributions, which BASIC does for you.



# BASIC HSA Administration

- Customer Service
  - HSA accounts are readily available, but customer support for employers and employees regarding regulations and compliance is rare.
  - Dedicated Employer Account Representative
  - Toll-free employee support



# BASIC's Award Winning Services



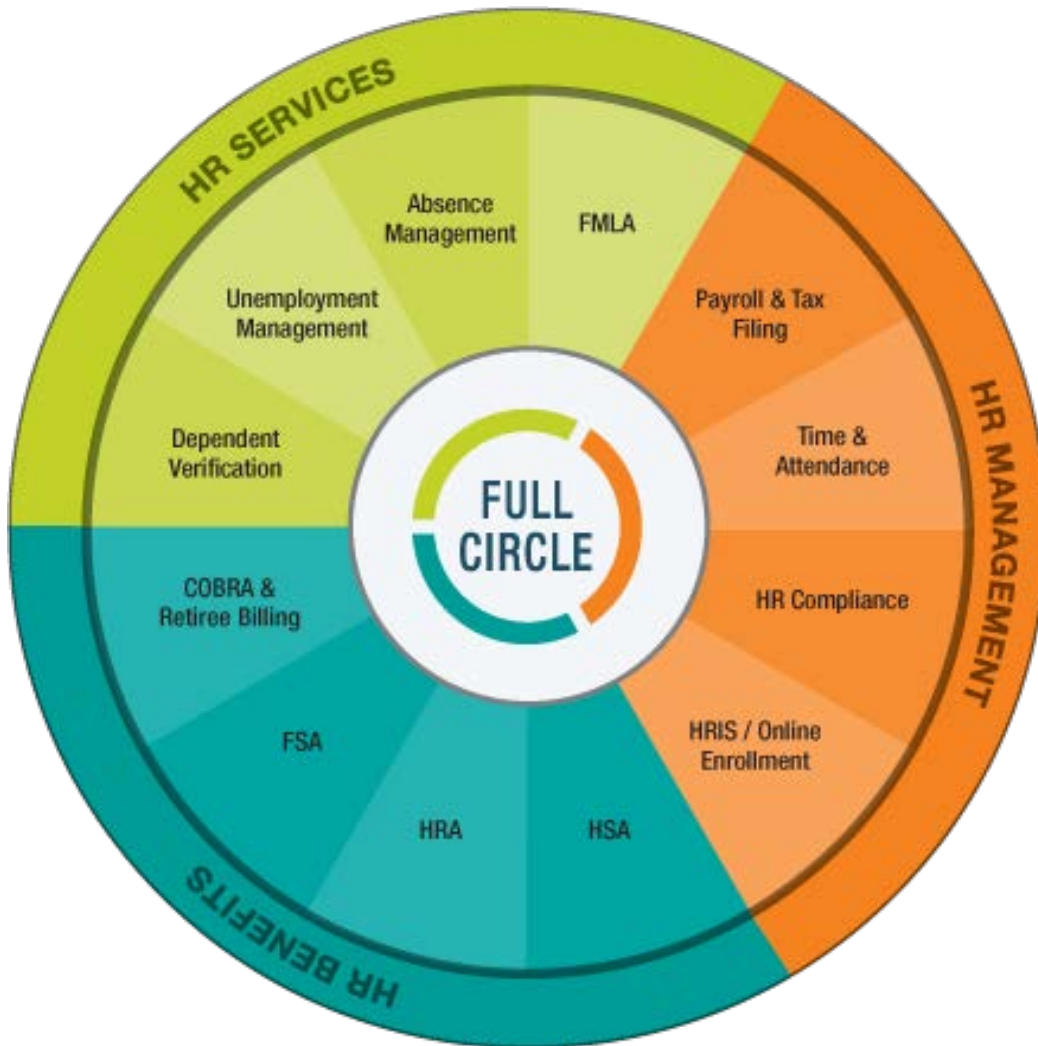
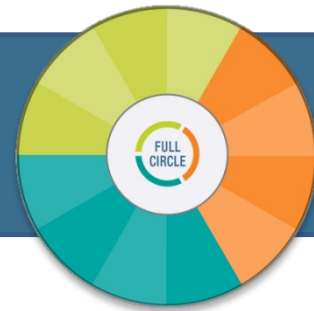
[Request a price quote or proposal for one or more of BASIC's services.](#)

- FMLA
- FSA / HRA / HSA
- COBRA
- Payroll & Timekeeping
- Absence Management

Learn more about BASIC's Employer Compliance Service

- [ERISA Essentials](#)
- [2016 ACA Elevate](#)

# Contact Us

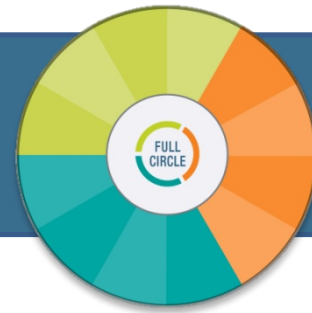


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**Keep it BASIC.**



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[www.basiconline.com](http://www.basiconline.com)

# Disclaimer



This presentation is designed to provide accurate information in regard to the subject matter covered. It is provided with the understanding that BASIC is not engaged in rendering legal or other professional services. If legal advice or other expert assistance is required, the services of a competent attorney or other professional person should be sought. Due to the numerous factual issues which arise in any human resource or employment question, each specific matter should be discussed with your attorney.