



# The Participant Experience on the New FloresHR Portal

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February 24, 2026



# Welcome to Our Webinar!

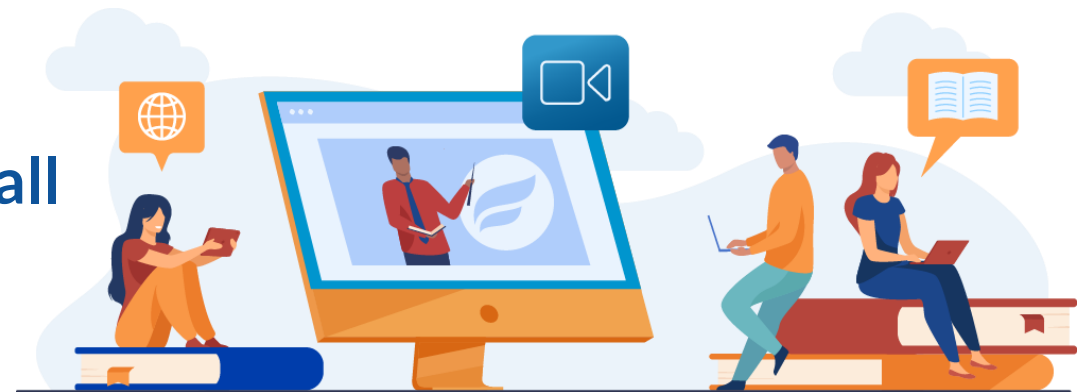
## • Questions during the webinar?

- Use the Questions panel to submit questions
- We'll answer questions live during our Q&A time
- We'll address unanswered questions by email after the webinar
- Please note: the purpose of this session is to provide an overview of funding processes; if you have questions on other topics, please contact your FloresHR account manager

## • Questions later?

- Other questions: Contact your FloresHR representative
  - Clients – Account Manager
  - Brokers – Sales Team Member
- Or call us at 800-532-3327 and select Option 4 for employer support

## • Recording and slides will be shared with all registrants following the webinar





# Agenda

- 1 Accessing the Account
- 2 Landing Page
- 3 Updating User Profile
- 4 Reordering a Debit Card
- 5 Communications
- 6 Filing a New Claim
- 7 Checking the Status of a Claim
- 8 Q&A

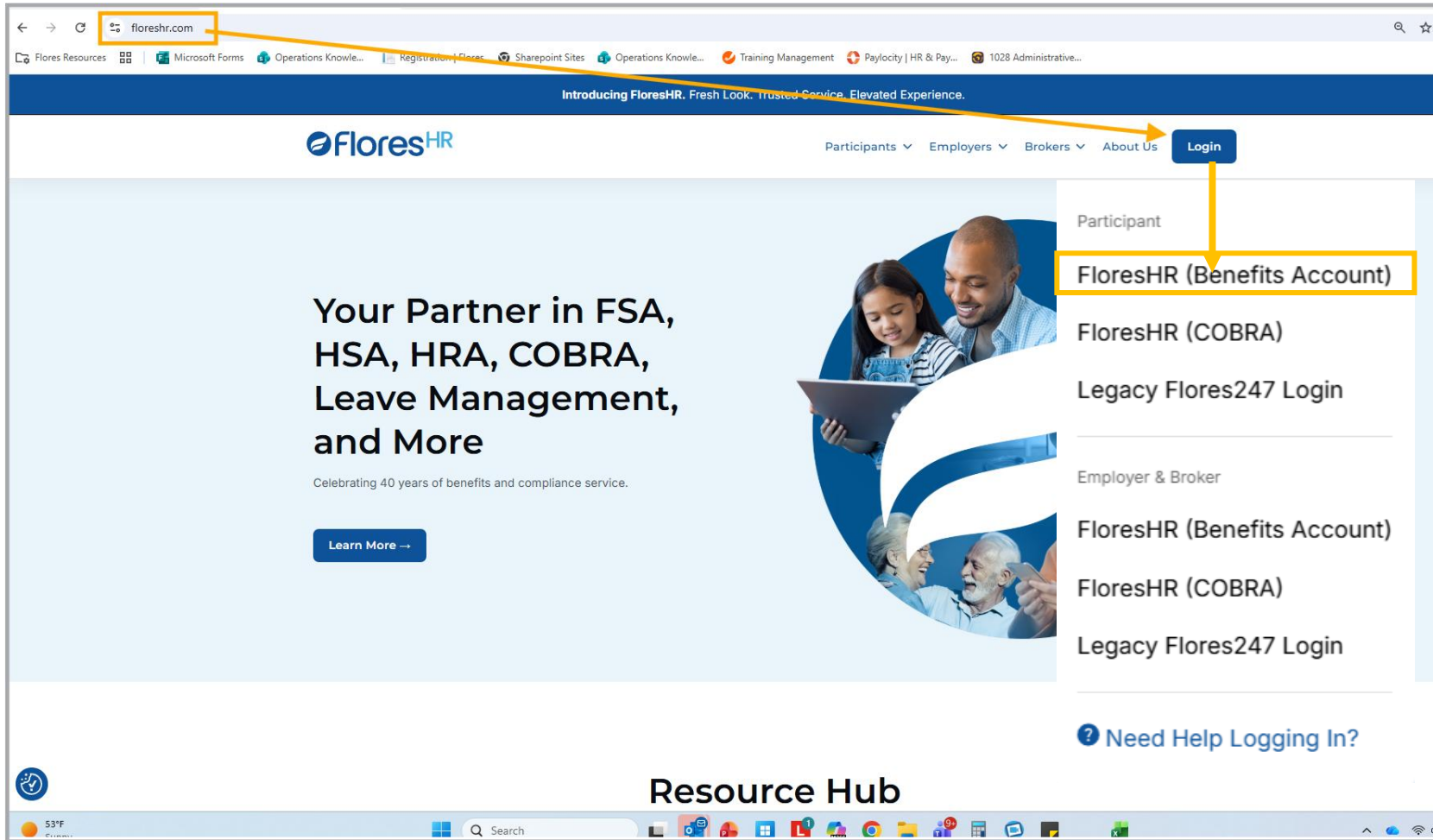
# Accessing the Account



# Accessing the Account

- Go to FloresHR.com
- Click on the blue Login button
- Click on FloresHR (Benefits Account)

The participant should not use the Legacy Flores247 Login option.



# Accessing the Account

- If this is the first time logging into the new experience, click on the light blue REGISTSER Button.
- After Registering the first time, the participant will need to enter their Userid and Password they created.

If the participant does not remember the Userid or Password, they can self service by using the [Let us help](#) hyperlink.

floreshr.healthcareportal.com/Authentication/Handshake

Flores Resources Microsoft Forms Operations Knowle... Registration | Flores Sharepoint Sites Operations Knowle... Training Management Paylocity | HR & Pay... 1028 Administrative...

FloresHR 800-532-3327 CustomerService@FloresHR.com Login

We will maintain the confidentiality of your personal information in accordance with our privacy policy.

Sign in

UserId \*

Forgot your Username? [Let us help](#)

Password \*

Forgot your Password? [Let us help](#)

✓ SIGN IN

Don't have an account?

REGISTER

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53°F Sunny

Search

SITE MAP

# Landing Page



# Landing Page

- The Your Accounts section will display the accounts you have for the current plan year and any accounts where the claim filing deadline has not been reached.
- If there were additional accounts not displayed, click on the down arrows to either the right or the left of VIEW MORE ACCOUNTS

The screenshot displays the FloresHR Personal Dashboard. The 'Your Accounts' section is highlighted with a yellow border and shows two accounts: Healthcare FSA and Life Balanced. Each account has a balance bar chart and a 'VIEW MORE ACCOUNTS' button with a down arrow. The 'Recent Transactions' section on the right lists various transactions with amounts, account types, and statuses. An 'Alerts' section at the bottom left shows a list of recent events. The top navigation bar includes the FloresHR logo, contact information, and a 'Personal Dashboard' label. A notification badge with the number '16' is visible in the top right corner.

Account Name	Plan Year	Balance	Spent
Healthcare FSA	11/01/2025-10/31/2026	\$999.84	\$646.53
Life Balanced	01/01/2026-12/10/2026	\$360.00	\$66.97

Amount	Account	Status	Transaction Type	Date
\$41.66	Healthcare FSA	Approved	Deposit	Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 2, 2026
(\$20.25)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$5.00)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$293.03)	Life Balanced	Approved	Claim	Jan 30, 2026
\$41.66	Healthcare FSA	Approved	Deposit	Jan 30, 2026
(\$1.00)	Healthcare FSA	Denied	Claim	Jan 16, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Jan 15, 2026

Date	Time	Event
Feb 5, 2026	1:32 pm	Card Transaction Approved
Feb 4, 2026	11:46 am	Card Transaction Approved
Feb 2, 2026	7:56 am	Card Transaction Approved
Jan 31, 2026	3:42 am	Reimbursement Processed
Jan 29, 2026	8:33 am	Participant Claim Entry

# Landing Page

- Recent Transactions will show all approved/denied manual claims and point of sales transactions. Also, any deposits being made into the account.

**Important:** Deposits showing for FSA or Limited FSA do not increase the amount of available funds as the total amount was provided at the beginning of the plan year.

The screenshot displays the FloresHR Personal Dashboard. The top navigation bar includes the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and the text 'Personal Dashboard'. A notification badge shows 16 notifications.

**Your Accounts**

Plan years to show:  Previous  Current  Future

**Healthcare FSA** (11/01/2025-10/31/2026)

Balance: \$646.53 | Spent: \$353.31

**Life Balanced** (01/01/2026-12/10/2026)

Balance: \$66.97 | Spent: \$293.03

**Alerts**

- Feb 5, 2026 1:32 pm Card Transaction Approved
- Feb 4, 2026 11:46 am Card Transaction Approved
- Feb 2, 2026 7:56 am Card Transaction Approved
- Jan 31, 2026 3:42 am Reimbursement Processed
- Jan 29, 2026 8:33 am Participant Claim Entry

**Recent Transactions**

\$41.66	Healthcare FSA	Approved	Deposit Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card Feb 9, 2026
(\$25.00)	Healthcare FSA	Approved	Card Feb 2, 2026
(\$20.25)	Healthcare FSA	Approved	Card Jan 30, 2026
(\$5.00)	Healthcare FSA	Approved	Card Jan 30, 2026
(\$293.03)	Life Balanced	Approved	Claim Jan 30, 2026
\$41.66	Healthcare FSA	Approved	Deposit Jan 30, 2026
(\$1.00)	Healthcare FSA	Denied	Claim Jan 16, 2026
(\$25.00)	Healthcare FSA	Approved	Card Jan 15, 2026

[SEE ALL](#)

**Balance Due**

# Landing Page

- Alerts will show communications to the processing steps of the claims.

The screenshot displays the FloresHR Personal Dashboard. The top navigation bar includes the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and a 'Personal Dashboard' title. A notification badge shows 16 alerts. The main content area is divided into three sections:

- Your Accounts:** Displays two accounts: Healthcare FSA (11/01/2025-10/31/2026) with a balance of \$646.53 and spent amount of \$353.31; and Life Balanced (01/01/2026-12/10/2026) with a balance of \$66.97 and spent amount of \$293.03.
- Recent Transactions:** A table listing transactions with columns for amount, account type, status, and date.
- Alerts:** A list of alerts with a yellow border, showing the most recent ones: Card Transaction Approved (Feb 5, 2026 1:32 pm), Card Transaction Approved (Feb 4, 2026 11:46 am), Card Transaction Approved (Feb 2, 2026 7:56 am), Reimbursement Processed (Jan 31, 2026 3:42 am), and Participant Claim Entry (Jan 29, 2026 8:33 am).

Amount	Account	Status	Transaction Type	Date
\$41.66	Healthcare FSA	Approved	Deposit	Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 2, 2026
(\$20.25)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$5.00)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$293.03)	Life Balanced	Approved	Claim	Jan 30, 2026
\$41.66	Healthcare FSA	Approved	Deposit	Jan 30, 2026
(\$1.00)	Healthcare FSA	Denied	Claim	Jan 16, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Jan 15, 2026

Timestamp	Alert Description
Feb 5, 2026 1:32 pm	Card Transaction Approved
Feb 4, 2026 11:46 am	Card Transaction Approved
Feb 2, 2026 7:56 am	Card Transaction Approved
Jan 31, 2026 3:42 am	Reimbursement Processed
Jan 29, 2026 8:33 am	Participant Claim Entry

# Updating User Profile



# Updating User Profile

- Click on the drop-down arrow to the right of the participant's name.

The screenshot displays the 'Personal Dashboard' for a user named John Doe. The dashboard includes several sections:

- Your Accounts:** Shows balances and amounts spent for 'Healthcare FSA' and 'Life Balanced' accounts. Healthcare FSA has a balance of \$646.53 and \$353.31 spent. Life Balanced has a balance of \$66.97 and \$293.03 spent.
- Recent Transactions:** A list of transactions including deposits, card transactions, and claims for both Healthcare FSA and Life Balanced.
- Alerts:** A list of recent events such as 'Card Transaction Approved' and 'Reimbursement Processed'.

A yellow arrow points to the user name 'Hi, John Doe' in the top right corner, which has a small drop-down arrow next to it.

# Updating User Profile

- Clicking on the blue EDIT PROFILE button, able to change:
  - Contact Number
  - Address
- Use the Change Password to update the password.
- Add/Change Direct Deposit
- To change the UserID, use the Delete Account Credentials. This reset the login and the participant would need to re-register the account. **Once deleted, it cannot be re-added.**

The screenshot displays the 'User Profile' page on the FloresHR website. The page is titled 'User Profile' and includes the FloresHR logo and contact information (800-532-3327, CustomerService@FloresHR.com). The profile information is organized into several sections:

- Profile Summary:** Includes a placeholder for a profile picture with a 'Change Picture' link, the name 'John Doe', and fields for Date of Birth (Jan 1, 1900), Marital Status (None), and Gender (None).
- Contact Information:** Lists Phone (\*\*\*-\*\*\*-5390), Mobile Phone (\*\*\*-\*\*\*-5390), and Email Address (j\*\*\*\*\*@gmail.com).
- Home Address:** 123 Main St, St Petersburg, FL, 33709, US. An 'EDIT PROFILE' button is located to the right of this section.
- Employer Information:** Shows Employer as 'Flores & Associates, LLC' and Employee Status as 'Active'. An 'Edit' button is present.
- Direct Deposit:** Shows Reimbursement Method as 'Direct Deposit', Account Number as '\*\*\*\*46', and Routing Number as '\*\*\*\*61'.
- Account Type:** 'Checking'.

At the bottom of the profile section, there is a 'Family Members' heading and an 'ADD FAMILY MEMBER' button. The footer of the page contains the copyright notice: 'Copyright © 2025 Flores & Associates, LLC. All Rights Reserved.' and a weather widget showing '54°F Sunny'.

# Reordering Debit Card



# Reordering Debit Card

- Click on the drop-down arrow to the right of the participant's name.
- Select **Debit Card**

The screenshot displays the 'Personal Dashboard' for a user named John Doe. The dashboard is divided into several sections:

- Your Accounts:** Shows two accounts: 'Healthcare FSA' (Plan years: 11/01/2025-10/31/2026) with a balance of \$646.53 and spent amount of \$353.31; and 'Life Balanced' (Plan years: 01/01/2026-12/10/2026) with a balance of \$66.97 and spent amount of \$293.03. A 'VIEW MORE ACCOUNTS' link is present.
- Recent Transactions:** A table listing transactions with columns for amount, account type, status, and date. A 'SEE ALL' button is located below the table.
- Alerts:** A list of recent alerts, including 'Card Transaction Approved' and 'Reimbursement Processed'.
- Balance Due:** A section at the bottom right, partially visible.

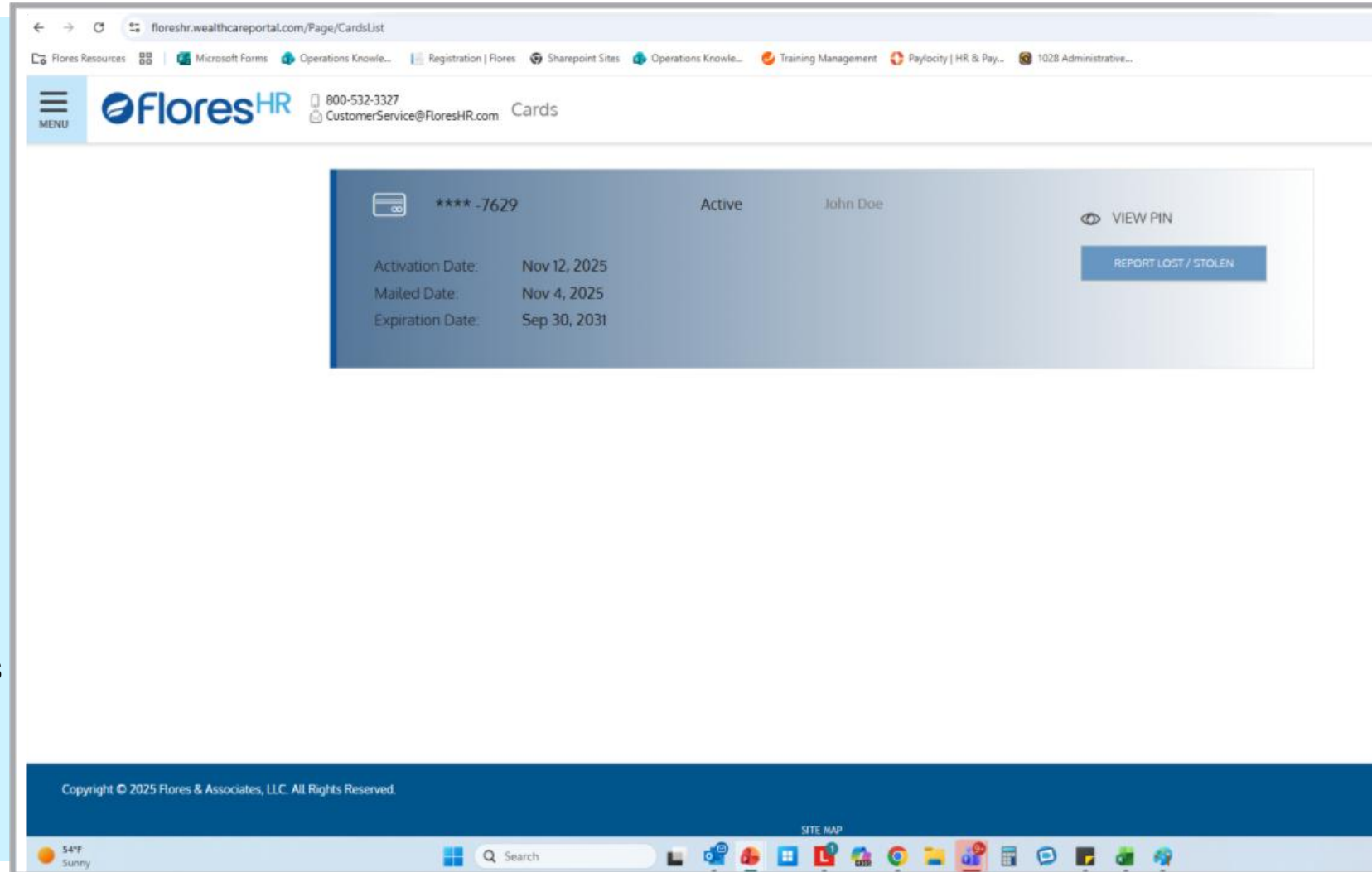
A yellow arrow points to the user's name 'Hi, John Doe' in the top right corner, which has a small drop-down arrow next to it.

Amount	Account	Status	Transaction Type	Date
\$41.66	Healthcare FSA	Approved	Deposit	Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
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(\$20.25)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$5.00)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$293.03)	Life Balanced	Approved	Claim	Jan 30, 2026
\$41.66	Healthcare FSA	Approved	Deposit	Jan 30, 2026
(\$1.00)	Healthcare FSA	Denied	Claim	Jan 16, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Jan 15, 2026


# Reordering Debit Card

- Each debit card that has been issued on the account will be displayed.
- Only Active cards will be in blue.
- Participant cans can reorder debit cards or view the PIN number associated with the account

**Important:** Using the PIN does not allow for cash back or ATM withdrawals.



The screenshot displays the FloresHR website interface. The browser address bar shows the URL `floreshr.wealthcareportal.com/Page/CardsList`. The navigation bar includes the FloresHR logo, contact information (800-532-3327 and `CustomerService@FloresHR.com`), and a "Cards" section. The main content area features a table with one row representing an active debit card. The card details are as follows:

Card Icon	Card Number	Status	Cardholder Name	Actions
	**** -7629	Active	John Doe	<a href="#">VIEW PIN</a> <a href="#">REPORT LOST / STOLEN</a>

Below the card details, the following dates are listed:

- Activation Date: Nov 12, 2025
- Mailed Date: Nov 4, 2025
- Expiration Date: Sep 30, 2031

The footer of the page contains the copyright notice: "Copyright © 2025 Flores & Associates, LLC. All Rights Reserved." and a "SITE MAP" link. The Windows taskbar at the bottom shows the date and time as 54°F Sunny.

# Communications

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# Communications

- Click on the drop-down arrow to the right of the participant's name.
- Click **Communications**

800-532-3327  
CustomerService@FloresHR.com Personal Dashboard

16 Notifications Hi, John Doe

### Your Accounts

Plan years to show:  Previous  Current  Future

#### Healthcare FSA (11/01/2025-10/31/2026)

\$999.84

Balance \$646.53 Spent \$353.31

#### Life Balanced (01/01/2026-12/10/2026)

\$360.00

Balance \$66.97 Spent \$293.03

VIEW MORE ACCOUNTS

### Recent Transactions

\$41.66	Healthcare FSA	Approved	Deposit	Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 2, 2026
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(\$5.00)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$293.03)	Life Balanced	Approved	Claim	Jan 30, 2026
\$41.66	Healthcare FSA	Approved	Deposit	Jan 30, 2026
(\$1.00)	Healthcare FSA	Denied	Claim	Jan 16, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Jan 15, 2026

SEE ALL

### Alerts

Feb 5, 2026 1:32 pm	Card Transaction Approved
Feb 4, 2026 11:46 am	Card Transaction Approved
Feb 2, 2026 7:56 am	Card Transaction Approved
Jan 31, 2026 3:42 am	Reimbursement Processed
Jan 29, 2026 8:33 am	Participant Claim Entry

SEE ALL

Balance Due

# Communications

- The participant can receive both mobile and email notifications .
- The participant must register their mobile number to receive text messages.

The screenshot displays the 'Communication Settings' page on the FloresHR portal. The page is titled 'Communication Settings' and includes a navigation menu with 'FloresHR' and contact information (800-532-3327, CustomerService@FloresHR.com). The main content area is divided into two sections: 'Assigned Notifications' and 'Phone Registration Status'.

**Assigned Notifications:** This section lists various events with radio buttons to select the preferred notification method (mobile, Email, both, none). The 'both' option is selected for most events.

Notification Type	mobile	Email	both	none
Card Lost/Stolen	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Card Mailed	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Card Transaction Approved	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Direct Deposit Account Change	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Direct Deposit Bank Account Validation	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Email Address Change	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
IRS Grace Period Reminder	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Online Balance Repayment Confirmation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Online Balance Repayment Failure	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**Phone Registration Status:** This section shows the user's mobile number (\*\*\*-\*\*\*-5390) is registered. A yellow box highlights this section. Below the number, there is an information icon and text: "Your mobile number, listed above, is registered to receive SMS notifications and alerts. You may text **BAL** to +1 833-318-3090 for your account balance, **HELP** to +1 833-318-3090 for help, and **STOP** to +1 833-318-3090 to opt out of future notifications."

# Filing a New Claim



# Filing a New Claim

- Click on **MENU** in the upper left of the screen.
- Click on **Reimbursement**
- Click **Issue Reimbursement**

The screenshot shows the FloresHR Personal Dashboard. The navigation menu is open, and 'Issue Reimbursement' is highlighted with a yellow arrow. The dashboard includes sections for 'Your Accounts', 'Recent Transactions', and 'Balance Due'.

**Recent Transactions Table:**

Amount	Account Type	Status	Transaction Type	Date
\$41.66	Healthcare FSA	Approved	Deposit	Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 2, 2026
(\$20.25)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$5.00)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$293.03)	Life Balanced	Approved	Claim	Jan 30, 2026
\$41.66	Healthcare FSA	Approved	Deposit	Jan 30, 2026
(\$1.00)	Healthcare FSA	Denied	Claim	Jan 16, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Jan 15, 2026

# Filing a New Claim

- Click on **Select Service Type**.
- Click on **Reimbursement**
- Click **Issue Reimbursement**
- Locate and click on the service type relating to the claim the service was provided for.
- Click the blue **NEXT** button at the bottom.

The screenshot shows the 'Add New Expense' page on the FloresHR portal. The page title is 'Expense Type Add New Expense'. Below the title, there is a section titled 'Let's Get Started' with the text: 'On the next few screens, we will ask you some questions about the expense you would like to submit.' To the right of this text is a blue button labeled 'SUBMIT EXPENSE NOW'. Below this is a dropdown menu labeled 'Select from your available service options:\*' with a required field asterisk. The dropdown menu is open, showing a list of service types: Dental, Lifestyle, Medical (highlighted in blue), Orthodontia, Over-the-Counter, and Prescription. A yellow box highlights the 'Select Service Type' dropdown menu, and a yellow arrow points to the 'Medical' option. Below the dropdown menu is a blue button labeled 'NEXT'. At the bottom of the page, there is a footer with the FloresHR logo, a weather widget showing '54°F Sunny', a search bar, and a taskbar with various application icons.

# Filing a New Claim

- Click on **Select Claimant**.
- Select the claimant from the list OR click on **Add New Dependent**
- Click the blue **NEXT** button

Expense Type / Claimant

## Add New Expense

Who is this expense for?

Please select the individual who incurred this expense.

\* Required Field

Select Claimant ▾

Back NEXT

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54°F Sunny

Search

SITE MAP

# Filing a New Claim

- Enter the date of service as the start date.
- The **END** Date is not needed unless this is for Dependent Care.
- Click the blue **NEXT** button

The screenshot shows a web browser window with the URL `floreshr.wealthcareportal.com/Page/AddExpense#/select-service-date`. The page title is "Add Expense" and the breadcrumb is "Expense Type / Claimant / Service Date". The main heading is "Add New Expense". Below this, the instruction "Select your service dates:" is displayed. There are two date input fields: "START DATE\*" and "END DATE". The "START DATE\*" field is highlighted with a yellow border and contains the placeholder text "mm/dd/yyyy" and a calendar icon. Below the date fields are two buttons: "Back" and "NEXT". The footer of the page contains the copyright notice "Copyright © 2025 Flores & Associates, LLC. All Rights Reserved." and a "SITE MAP" link. The Windows taskbar is visible at the bottom of the screen.

# Filing a New Claim

- Enter the reimbursement amount being requested.
- Click the blue **NEXT** button

floreshr.healthcareportal.com/Page/AddExpense#/enter-amount-eligible-expense

Flores Resources | Microsoft Forms | Operations Knowle... | Registration | Flores | Sharepoint Sites | Operations Knowle... | Training Management | Paylocity | HR & Pay... | 1028 Administrative...

MENU FloresHR 800-532-3327 CustomerService@FloresHR.com Add Expense

Expense Type / Claimant / Service Date / Amount

### Add New Expense

Enter the amount of your eligible expense.

CLAIM AMOUNT\* \$ \_\_\_\_\_  
Required Field

Back NEXT

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54°F Sunny

# Filing a New Claim

- Click on **ADD DOCUMENTATION** to attach the itemized receipt.
- If this claim is for a Dependent Care expense, include the tax ID or Social Security Number in the Notes for records box if not on the documentation.
- Click the blue **SUBMIT** button

The screenshot shows the 'Add Expense' form in the FloresHR system. The browser address bar is 'floreshr.healthcareportal.com/Page/AddExpense#/non-hsa-preview'. The page title is 'Add Expense'. The form is titled 'Add New Expense Preview' and asks the user to confirm information. The main entry is 'Pay Self' for '\$1.00' (with an 'Edit Amount' link). Below this, it specifies 'Prescription Expense for Scott Connatser (Edit Expense Type)', 'Service Date: Feb 23, 2026 (Edit Service Date)', and 'One Time Payment'. There is a 'Note for records:' field with a yellow arrow pointing to it. To the right is a large grey button with a blue plus sign and the text 'ADD DOCUMENTATION'. Below the form is a certification checkbox: 'I certify the claim is accurate. I understand and agree to the terms and conditions.' followed by a paragraph of terms. At the bottom are 'Cancel' and 'SUBMIT' buttons. The footer contains 'Copyright © 2025 Flores & Associates, LLC. All Rights Reserved.' and a system tray showing '53°F Sunny' and various application icons.

# Checking the Status of a Claim



# Checking the Status of a Claim

- Click on **MENU** in the upper left of the screen.
- Click on **Reimbursement**
- Click **Claim Activity**

The screenshot displays the FloresHR Personal Dashboard. The navigation menu on the left is expanded, showing options: Home, My Accounts, Reimbursements, Resources, Planning, and Smart Accounts. A yellow arrow points to the 'Claim Activity' option under the 'Reimbursements' category. The main content area shows a 'Recent Transactions' table with the following data:

Amount	Category	Status	Description	Date
\$41.66	Healthcare FSA	Approved	Deposit	Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 2, 2026
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\$41.66	Healthcare FSA	Approved	Deposit	Jan 30, 2026
(\$1.00)	Healthcare FSA	Denied	Claim	Jan 16, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Jan 15, 2026

Below the table is a 'SEE ALL' button. The dashboard also features a 'Balance Due' section at the bottom right.

# Checking the Status of a Claim

- By default, the Claim Activity screen will show all claims with Action Needed and Approved/Paid/Submitted.
- Click the boxes in front of the claims status to change the view.

The screenshot displays the 'Claim Activity' page in the FloresHR system. At the top, there is a navigation bar with the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and the page title 'Claim Activity'. Below the navigation bar, there is a filter section titled 'Which claims do you want to see? Select activities'. This section includes three checkboxes: 'Action Needed' (checked), 'Approved/Paid/Submitted' (checked), and 'Denied' (unchecked). A search bar labeled 'SEARCH FOR CLAIMS' is also present. To the right of the filter section are two buttons: 'ADD EXPENSE' and 'EXPORT TO EXCEL'. Below the filter section, a table lists several claims. The first five claims are all 'Paid' and have a status of 'Approved/Paid/Submitted'. The sixth claim is 'Approved' and also has a status of 'Approved/Paid/Submitted'. The table columns include the claim amount, the claim type (e.g., 'Paid PUBLIX #1628'), and the date of service and date of transaction. The bottom of the screen shows a Windows taskbar with the system tray indicating 53°F and Sunny weather, and a search bar.

Amount	Status	Card	Date of Service	Date of Transaction
(\$25.00)	Paid	PUBLIX #1628	Feb 5, 2026	Feb 9, 2026
(\$30.00)	Paid	PUBLIX #1628	Feb 4, 2026	Feb 9, 2026
(\$25.00)	Paid	SQ *ADVANCED BAY AREA	Feb 2, 2026	Feb 2, 2026
(\$20.25)	Paid	PUBLIX #1628	Jan 23, 2026	Jan 30, 2026
(\$5.00)	Paid	PUBLIX #1628	Jan 27, 2026	Jan 30, 2026
(\$203.03)	Approved	Claim Lifestyle #234285		

# Checking the Status of a Claim

- Click on the claim to get more information.

The screenshot displays the 'Claim Activity' page on the FloresHR portal. At the top, there's a navigation bar with the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and a 'Claim Activity' title. Below this, a filter section allows users to select activities: 'Action Needed' (checked), 'Approved/Paid/Submitted' (checked), and 'Denied' (unchecked). There are also buttons for 'ADD EXPENSE' and 'EXPORT TO EXCEL', and a search bar labeled 'SEARCH FOR CLAIMS'. The main content area shows a list of claims. One claim is highlighted with a yellow arrow pointing to its status 'Submitted' and amount '\$68.00'. This claim is expanded to show a detailed view. The detailed view includes: Claimant (redacted), Tracking #: 2619, Account: Life Balanced, Service Start Date: Feb 23, 2026, Service End Date: Feb 23, 2026, and Comments: Provider: (redacted). It also shows a 'RECEIPTS' section with two entries for Feb 24, 2026, and buttons for 'ADD RECEIPT', 'PRINT A CLAIM FORM', and 'PRINT'. The bottom of the detailed view shows another claim entry for '\$5.00' with status 'Paid' and provider 'PUBLIX #1628'.

# Checking the Status of a Claim

- Claims needing documentation will have a blue **ADD RECEIPT** button to allow for the itemized receipt to be added to the claim and have it reprocessed.

The screenshot displays the 'Claim Activity' page in the FloresHR system. The page header includes the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and navigation links. The main content area shows a table of denied claims. The table has columns for amount, status, and claim details. A yellow box highlights the 'ADD RECEIPT' buttons for three of the claims.

Amount	Status	Claim Details	Action
\$1.00	Denied Medical	Claim Medical #209927 Date of Service: Jan 16, 2026 Date of Transaction: Jan 16, 2026	
\$0.00	Denied MedicalTEST	Claim MedicalTEST #187398 Date of Service: Dec 29, 2025 Date of Transaction: Dec 30, 2025	ADD RECEIPT
\$107.18	Denied TECO PEOPLES GAS	Card Date of Service: Dec 23, 2025 Date of Transaction: Dec 23, 2025	ADD RECEIPT
\$1.00	Denied Medical	Claim Medical #181522 Date of Service: Dec 1, 2025 Date of Transaction: Dec 2, 2025	ADD RECEIPT

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# Q&A

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- **Questions now?**
  - Go ahead and use the Questions panel to submit funding questions now
  - We'll address unanswered questions by email after the webinar
- **Questions later?**
  - Other questions:
    - Clients – FloresHR Account Manager
    - Brokers – FloresHR Sales Team Member
  - Or call us at 800-532-3327 and select Option 4 for employer support
- **Resources: Platform Enhancement Guide**
  - <https://www.floreshr.com/platform-enhancement-guide/>





**Thank you!**

