



# The Participant Experience on the New FloresHR Portal

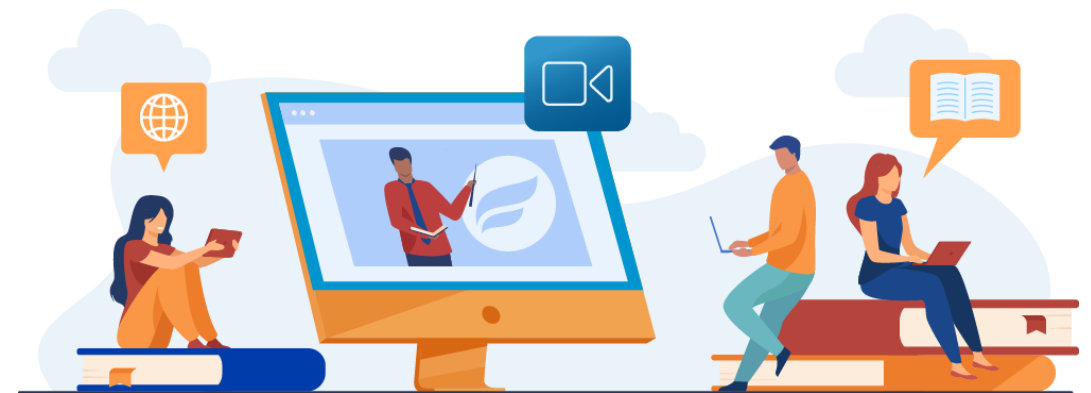
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Wednesday, March 4, 2026



# 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 the participant experience; 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)

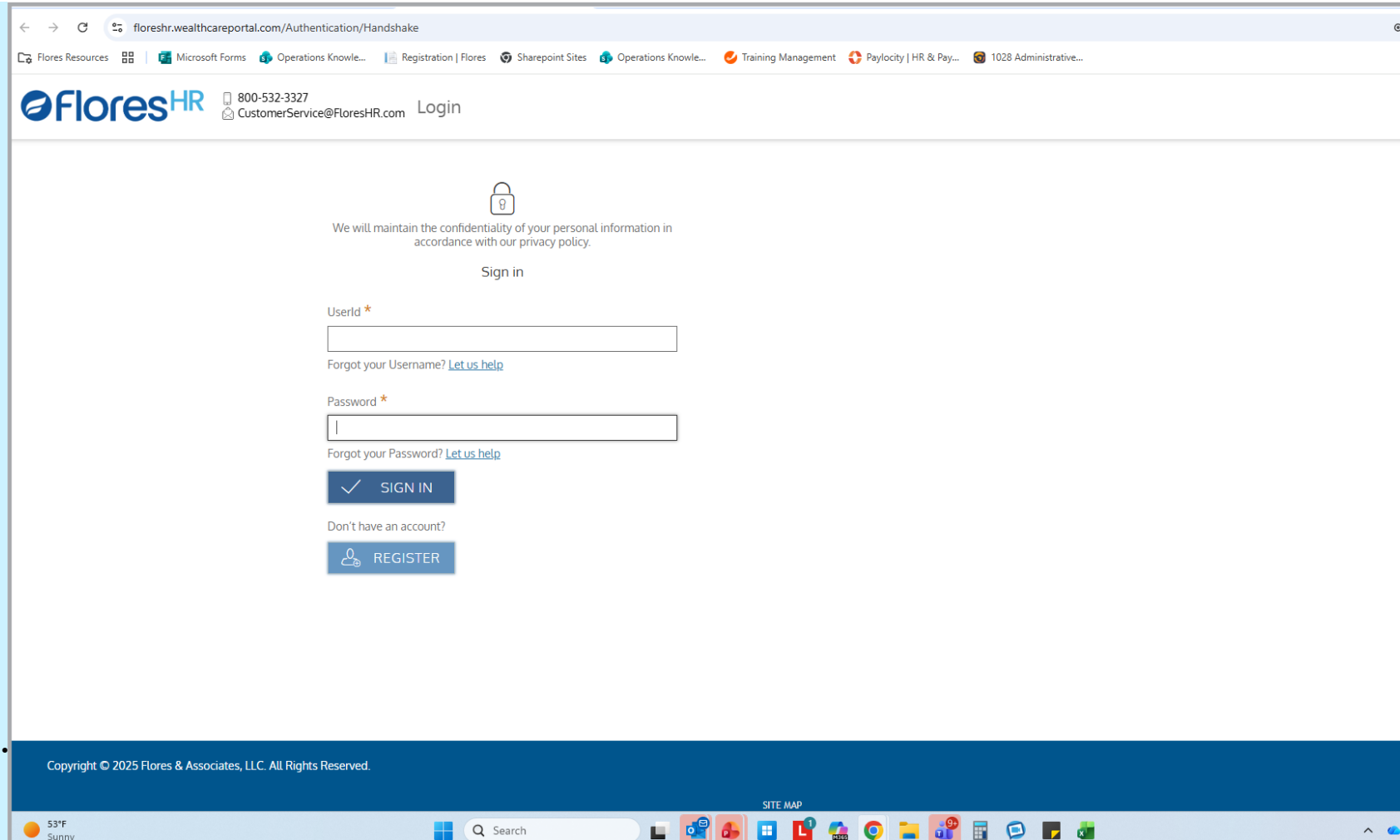
The participant should not use the Legacy Flores247 Login option.

The screenshot shows the FloresHR website interface. The browser address bar displays 'floreshr.com'. The website header includes the FloresHR logo and navigation links for Participants, Employers, Brokers, and About Us, along with a blue 'Login' button. A dropdown menu is open under the 'Login' button, showing options for Participant, Employer & Broker, and Legacy Flores247 Login. The 'Participant' section is highlighted, and the 'FloresHR (Benefits Account)' option is selected. The main content area features the headline 'Your Partner in FSA, HSA, HRA, COBRA, Leave Management, and More' and a 'Learn More' button. The footer includes a 'Resource Hub' link and a 'Need Help Logging In?' link.

# Accessing the Account

- If this is the first time logging into the new experience, click on the light blue REGISTER 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.



The screenshot shows a web browser window with the URL `floreshr.healthcareportal.com/Authentication/Handshake`. The page header includes the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and a 'Login' link. The main content area features a lock icon, a privacy statement, and a 'Sign in' heading. Below this are two input fields: 'UserId \*' and 'Password \*', each with a 'Forgot your [Username/Password]? [Let us help](#)' link. At the bottom of the form are two buttons: 'SIGN IN' (with a checkmark icon) and 'REGISTER' (with a person icon). The footer 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, time, and various application icons.

# 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, a balance amount, and a spent amount. The Healthcare FSA account has a balance of \$646.53 and a spent amount of \$353.31. The Life Balanced account has a balance of \$66.97 and a spent amount of \$293.03. Below the accounts is an 'Alerts' section with a list of recent events. To the right is a 'Recent Transactions' section with a table of transactions. At the bottom right, there is a 'Balance Due' section.

**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

**Balance Due**

# 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 a 'Personal Dashboard' label. A notification badge shows 16 notifications. The main content area is divided into several sections:

- Your Accounts:** Displays two accounts: Healthcare FSA (11/01/2025-10/31/2026) and Life Balanced (01/01/2026-12/10/2026). Each account has a balance bar chart showing the total amount and the amount spent. For Healthcare FSA, the balance is \$999.84 and spent is \$353.31. For Life Balanced, the balance is \$360.00 and spent is \$293.03.
- Alerts:** A list of recent alerts, including 'Card Transaction Approved' and 'Reimbursement Processed'.
- Recent Transactions:** A table showing a list of transactions, including deposits and claims, with their amounts, account types, and statuses.

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

The 'Recent Transactions' section is highlighted with a yellow border and includes a 'SEE ALL' button.

# 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 in the top right corner shows '16 Notifications'. 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. A 'VIEW MORE ACCOUNTS' link is present at the bottom.
- Recent Transactions:** A table listing transactions with columns for amount, account type, status, and date. Transactions include deposits and card payments for Healthcare FSA, and a claim reimbursement for Life Balanced.
- Alerts:** A table listing recent alerts, including card transaction approvals and reimbursement processing. This section is highlighted with a yellow border.

The bottom of the dashboard shows a 'Balance Due' section and a system tray with weather information (53°F Sunny) and various application icons.

# 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 resets 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 in the FloresHR system. 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:** Displays Reimbursement Method as 'Direct Deposit', Account Number (\*\*\*\*46), and Routing Number (\*\*\*\*61).

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 includes a navigation bar with contact information (800-532-3327, CustomerService@FloresHR.com) and a notification bell showing 16 notifications. The main content is divided into three sections: 'Your Accounts', 'Recent Transactions', and 'Alerts'. The 'Your Accounts' section shows two accounts: 'Healthcare FSA' with a balance of \$646.53 and a spent amount of \$353.31, and 'Life Balanced' with a balance of \$66.97 and a spent amount of \$293.03. The 'Recent Transactions' section lists various transactions, including deposits, card transactions, and claims. A yellow arrow points to the user's name 'Hi, John Doe' in the top right corner, indicating the location of the drop-down arrow mentioned in the instructions.

Account Name	Plan Period	Balance	Spent
Healthcare FSA	(11/01/2025-10/31/2026)	\$646.53	\$353.31
Life Balanced	(01/01/2026-12/10/2026)	\$66.97	\$293.03

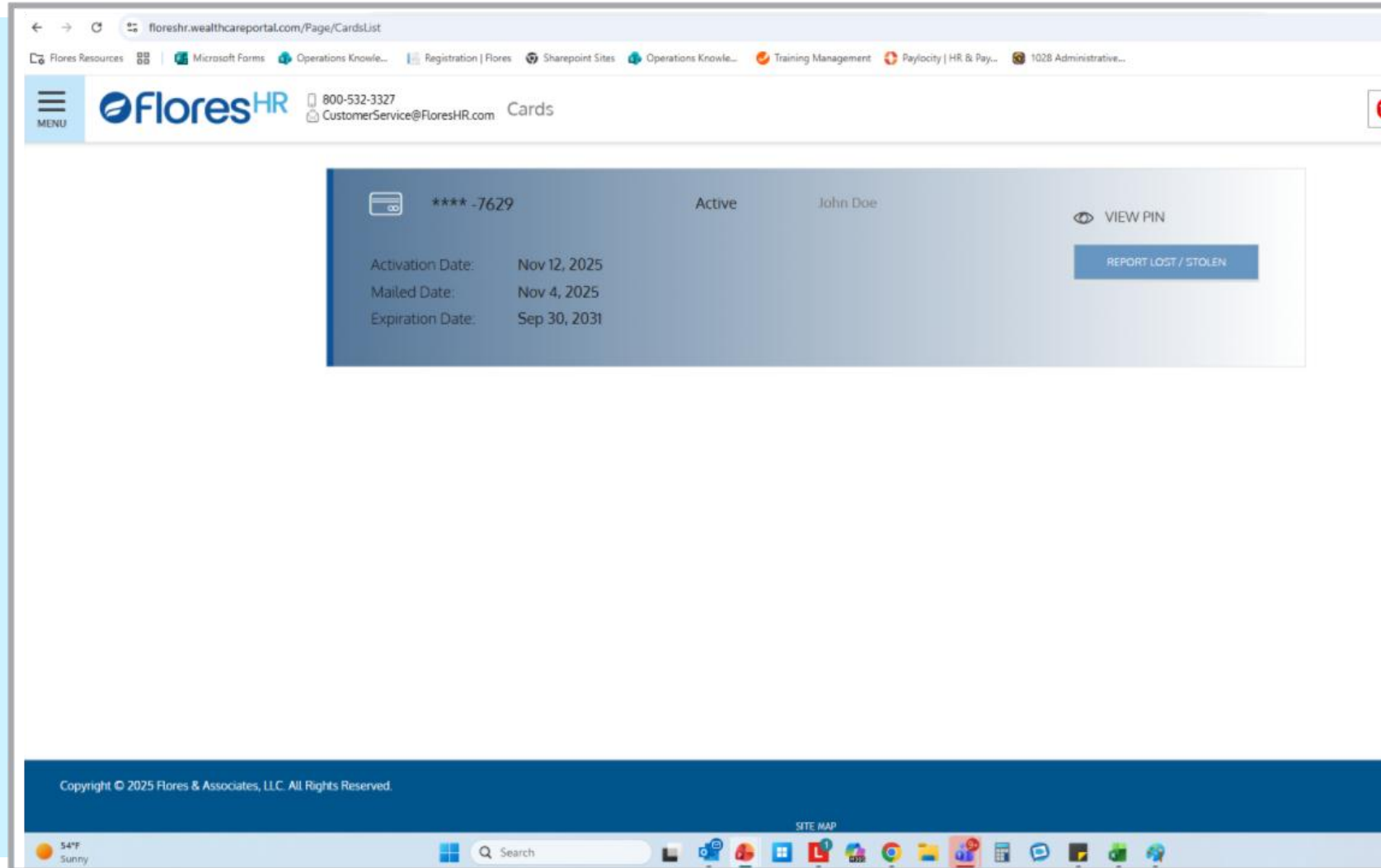
Amount	Category	Status	Transaction Type	Date
\$41.66	Healthcare FSA	Approved	Deposit	Feb 13, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$30.00)	Healthcare FSA	Approved	Card	Feb 9, 2026
(\$25.00)	Healthcare FSA	Approved	Card	Feb 2, 2026
(\$20.25)	Healthcare FSA	Approved	Card	Jan 30, 2026
(\$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	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

# 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 page header includes the FloresHR logo, contact information (800-532-3327 and `CustomerService@FloresHR.com`), and a navigation menu. The main content area features a blue card with the following details:

- Card number: \*\*\*\* -7629
- Status: Active
- Cardholder Name: John Doe
- Activation Date: Nov 12, 2025
- Mailed Date: Nov 4, 2025
- Expiration Date: Sep 30, 2031

Buttons for `VIEW PIN` and `REPORT LOST / STOLEN` are visible on the right side of the card. The footer 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
(\$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

### Alerts

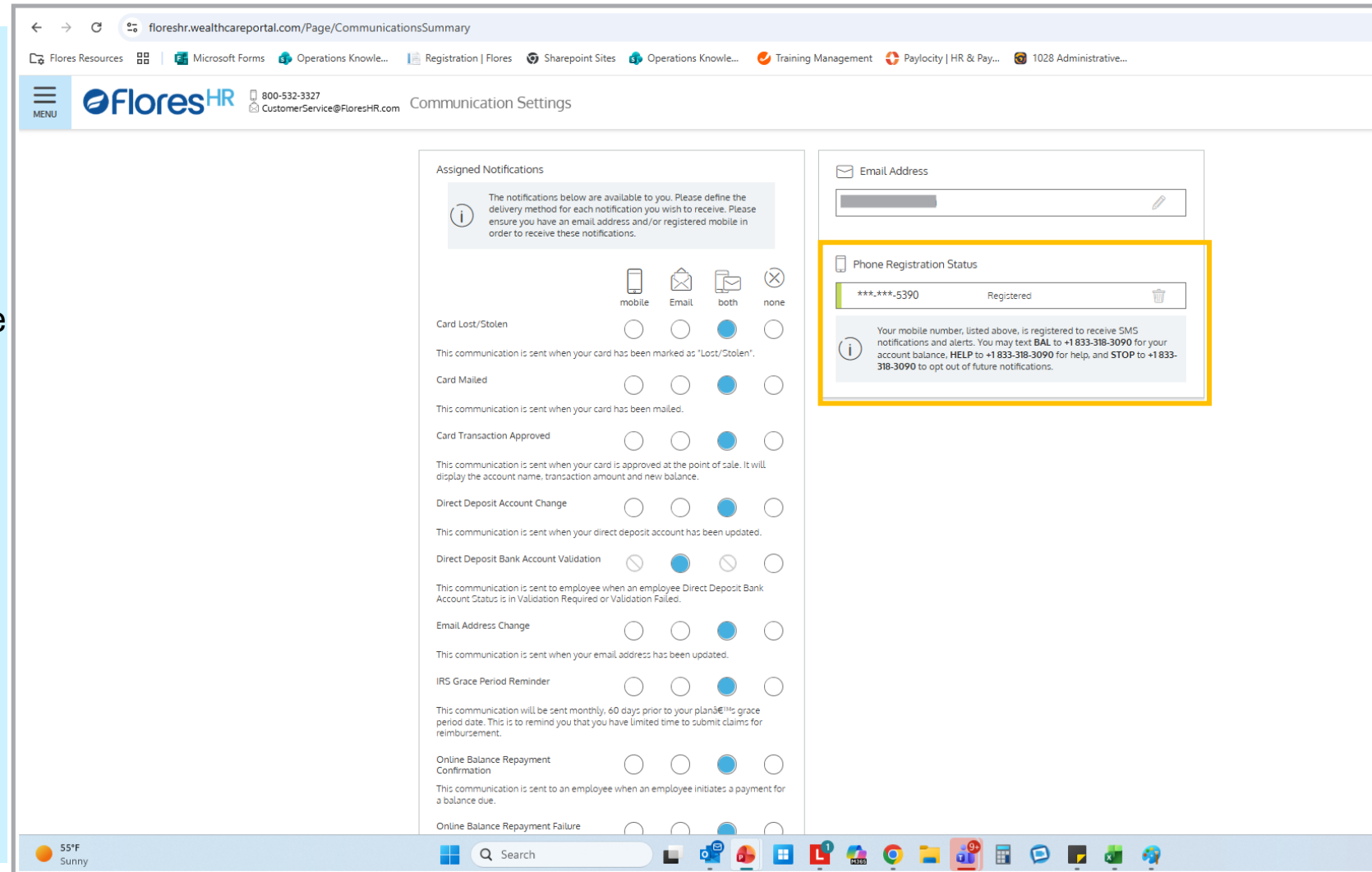
Feb 5, 2026 1:32 pm	Card Transaction Approved
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Feb 2, 2026 7:56 am	Card Transaction Approved
Jan 31, 2026 3:42 am	Reimbursement Processed
Jan 29, 2026 8:33 am	Participant Claim Entry

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 notification types with radio buttons for selecting the delivery method (mobile, Email, both, none). The 'both' option is selected for most notifications.

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 as '\*\*\*-\*\*-5390' and 'Registered'. A yellow box highlights this section, which also contains an information icon and a message: '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 : DCA Form

- Click on **MENU** in the upper left of the screen.
- Click on **Resources**
- Click **Forms and Documents**

The screenshot shows the FloresHR Personal Dashboard. The left-hand navigation menu is highlighted with yellow boxes around the 'Resources' and 'Forms and Documents' items. The main content area displays account information for two Healthcare FSA accounts, including balances and spent amounts. A red warning banner at the top right states: 'Never share your One-Time Passcode (OTP) with anyone — not even our staff.' Below the accounts, there is an 'Alerts' section with a 'SIGN UP' button. On the right side, there is a 'Recent Transactions' table.

Recent Transactions			
\$21.15	Healthcare FSA	Approved	Deposit Feb 20, 2026
\$76.92	Dependent Care FSA	Approved	Deposit Feb 20, 2026
\$76.92	Dependent Care FSA	Approved	Deposit Feb 6, 2026
\$21.15	Healthcare FSA	Approved	Deposit Feb 6, 2026
\$76.92	Dependent Care FSA	Approved	Deposit Jan 23, 2026
\$21.15	Healthcare FSA	Approved	Deposit Jan 23, 2026
(\$9.71)	Healthcare FSA	Approved	Card Jan 21, 2026
(\$20.40)	Healthcare FSA	Approved	Card Jan 21, 2026
(\$16.95)	Healthcare FSA	Approved	Card Jan 20, 2026
(\$3.52)	Healthcare FSA	Approved	Card Jan 20, 2026

# Filing a New Claim : DCA Form

**FloresHR** **Dependent Care Account Reimbursement Request Form**  
www.FloresHR.com

**File Online:** For fastest service, log in to your account at <https://accounts.floreshr.com> to file your claim electronically and upload your documentation.

**File via fax or mail:** Claim forms may also be filed either via fax or US Mail and sent to the following locations: Fax: 321-445-9621, Mail: FloresHR PO Box 1028 Allen Park, MI 48101

**Claim processing time:** Online Claims will be processed within 1-2 business days and eligible reimbursements distributed the same or following business day. Mailed and Faxed Claims will be processed within 2 business days after receipt of the form. You may check the status of your claim by logging in to your account at <https://accounts.floreshr.com>.

**PARTICIPANT:**

Last Name: [ ] First Name: [ ]  
Employee ID\*: [ ] Participant Home Zip Code: [ ] Employer Name: [ ]

**DEPENDENT CARE CLAIM 1:**

SERVICE START DATE (months): [ ] SERVICE END DATE (months): [ ] PROVIDERS TAX ID or SSN (required\*): [ ] PROVIDER NAME: [ ] Signature of Provider: [ ]

**DEPENDENT NAME AND DOL:** Relationship to Account Holder: [ ] Type of Service: [ ] OUT-OF-POCKET COST: \$ [ ]

**DEPENDENT CARE CLAIM 2:**

SERVICE START DATE (months): [ ] SERVICE END DATE (months): [ ] PROVIDERS TAX ID or SSN (required\*): [ ] PROVIDER NAME: [ ] Signature of Provider: [ ]

**DEPENDENT NAME AND DOL:** Relationship to Account Holder: [ ] Type of Service: [ ] OUT-OF-POCKET COST: \$ [ ]

**DEPENDENT CARE CLAIM 3:**

SERVICE START DATE (months): [ ] SERVICE END DATE (months): [ ] PROVIDERS TAX ID or SSN (required\*): [ ] PROVIDER NAME: [ ] Signature of Provider: [ ]

**DEPENDENT NAME AND DOL:** Relationship to Account Holder: [ ] Type of Service: [ ] OUT-OF-POCKET COST: \$ [ ]

**More expenses? Please complete another form.** CLAIM FORM TOTAL: \$ [ ]

**CERTIFICATION AND AUTHORIZATION:** I understand that dependent care expenses reimbursed under this plan can not be claimed as a deduction on my personal income tax return. I acknowledge that neither the group nor FloresHR, LLC is independently verifying that the dependent care provider's return complies with state and local law applicable to them. I have any responsibility for or obligations relating to the dependent care services rendered by the dependent care provider or any of the employees or representatives and I am making any contribution or guarantee that any money which is deducted from my pay (salary) is to be excluded from my gross income for federal, state or local income tax purposes.

I also understand that it is my obligation to determine whether the amount deducted from my pay is to be excluded from my gross income and to notify the group if I have reason to believe any such payment is not to be excluded. I agree to hold the group and FloresHR, LLC harmless from any and all liability and costs which either or both may incur as a result of, or in connection with, the provision of dependent care service to me or as my behalf by any dependent care provider.

By submitting this form, I certify that I and my spouse, if applicable, were either working, looking for work, or attending school full time during the time these dependent care expenses were incurred.

accounts.floreshr.com/Page/Documents

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 Forms & Documents

**FSA**

- FloresHR Health FSA FAQ
- FloresHR Health FSA Guide
- FloresHR Limited FSA FAQ

**Dependent Care**

- FloresHR Dependent Care Claim Form
- FloresHR Dependent Care Guide

# 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.' A blue button labeled 'SUBMIT EXPENSE NOW' is visible. Below this, there is a dropdown menu for 'Select Service Type' with a downward arrow, which is highlighted with a yellow box. 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 arrow points from the 'SUBMIT EXPENSE NOW' button to the 'Select Service Type' dropdown. Below the dropdown, there is a note: 'Please fill out the fields below and make sure to attach the proper documentation. When finished, accept the terms and click submit.' At the bottom of the form, there is a blue button labeled 'NEXT'. The page footer includes the FloresHR logo, a weather widget showing 54°F Sunny, and a search bar.

# 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 at the bottom shows the date and time as "54°F Sunny" and "Search".

# 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 Search

SITE MAP

# 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 New Expense Preview' page in the FloresHR system. The page title is 'Add Expense' and the URL is 'floreshr.healthcareportal.com/Page/AddExpense#/non-hsa-preview'. The form displays the following information:

- Expense Type / Claimant / Service Date / Amount / Preview**
- Add New Expense Preview**
- Please confirm the following information is correct:
- Pay Self** **\$1.00** (Edit Amount)
- Prescription Expense for Scott Connatser (Edit Expense Type)
- Service Date: Feb 23, 2026 (Edit Service Date)
- One Time Payment
- Note for records: [Empty text box]
- ADD DOCUMENTATION** button
- [DOCUMENTATION HELP](#)
- I certify the claim is accurate. I understand and agree to the terms and conditions.
- I certify that I have not been reimbursed by any other and that to the best of my knowledge, this expense is eligible for reimbursement. I additionally understand that I must submit documentation to support my submission and in order to receive reimbursement. If I am not eligible to receive reimbursement you will receive notification of the claim determination.
- Cancel** button
- SUBMIT** button

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# 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	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

At the bottom of the dashboard, there is a 'Balance Due' section.

# 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 contains 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 of claims is displayed. The table has columns for amount, status, and details. The first five rows show 'Paid' claims with amounts of \$25.00, \$30.00, \$25.00, \$20.25, and \$5.00. The sixth row shows an 'Approved' claim with an amount of \$203.03. The details for each claim include the date of service and the date of transaction.

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

# Checking the Status of a Claim

- Click on the claim to get more information.

The screenshot shows the 'Claim Activity' page in the FloresHR system. The page header includes the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and the title 'Claim Activity'. A navigation bar at the top lists various system links. The main content area features a filter section for 'Which claims do you want to see?' with options for 'Action Needed', 'Approved/Paid/Submitted', and 'Denied'. A search bar labeled 'SEARCH FOR CLAIMS' is also present. Below the filters, a table displays claim entries. One entry is highlighted with a yellow arrow pointing to its detailed view. The detailed view shows the following information:

Amount	Status	Claim Details	Actions
\$68.00	Submitted	Claim Date of Service: Feb 23, 2026 Date of Transaction: Feb 24, 2026	ADD RECEIPT
(\$25.00)	Paid	Card Date of Service: Feb 5, 2026 Date of Transaction: Feb 9, 2026	
\$68.00	Submitted	Claim Date of Service: Feb 23, 2026 Date of Transaction: Feb 24, 2026	ADD RECEIPT PRINT A CLAIM FORM PRINT
(\$5.00)	Paid	Card Date of Service: Jan 27, 2026	

The detailed view for the \$68.00 Submitted claim includes the following fields:

- Claimant: [Redacted]
- Tracking #: 2619 [Redacted]
- Account: Life Balanced
- Service Start Date: Feb 23, 2026
- Service End Date: Feb 23, 2026
- Comments:
- Provider:

RECEIPTS:

- Feb 24, 2026
- Feb 24, 2026

# 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 shows the FloresHR ClaimsList page. The browser address bar is floreshr.healthcareportal.com/Page/ClaimsList. The page header includes the FloresHR logo, contact information (800-532-3327, CustomerService@FloresHR.com), and the title 'Claim Activity'. Below the header, there are filters for 'Which claims do you want to see?' and 'Select activities'. The 'Denied' activity is selected. There are buttons for 'ADD EXPENSE' and 'EXPORT TO EXCEL'. A search bar is labeled 'SEARCH FOR CLAIMS'. The main content area displays a table of denied claims. The table has four rows, each representing a claim. The first row is for a 'Claim Medical #209927' with a balance of \$1.00. The second row is for a 'Claim MedicalTEST #187398' with a balance of \$0.00. The third row is for a 'Card TECO PEOPLES GAS' with a balance of \$107.18. The fourth row is for a 'Claim Medical #181522' with a balance of \$1.00. Each row has an 'ADD RECEIPT' button on the right side, which is highlighted with a yellow box. The footer of the page contains the copyright notice: Copyright © 2025 Flores & Associates, LLC. All Rights Reserved.

Amount	Claim Description	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

# 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!**

