



Employer Accounts for Benefit Managers

Choose Your Administrative Level (Flex - Employer Portal)

Surency offers several access levels for benefit administrators. Please review to determine which level you are requesting.

Level 1 - Benefits Administrator

View plans, access resources (forms/links) and submit requests to Surency (terminating or adding enrollments).

Level 2 - Employee Administrator

Search for employees, view employee details, balance and claims.

Level 3 - Import Administrator

Import new files, view the import queue, and take action on files in the import queue.
(Required in order to send payroll and enrollment files)

Level 4 - Import Monitor

View the import queue and access the exception log to view errors within import files.

Level 5 - Report Reviewer

View scheduled reports and metrics.

Level 6 - Report Manager

Request, view and remove reports and view metrics.

*Note: You can choose to have access to more than one Administrative Level.
Example: (1-6), (2-4), (2,4,6)*

Online Billing (Flex - Bills Account)

You may choose to have your monthly billing available electronically through our website at Surency.com. If you choose this option, you will receive a monthly email reminder when the bill is posted to our website. You can view and download the billing by logging in to your **Flex-Bills Account**.

Where to send your completed Employer Account Registration Form

If you would like to have access to your Flex-Employer Portal and Flex-Bills Accounts as explained above, fill out the attached Employer Account Registration Form and either fax it back to Surency at **316-462-3329** or email it to: **marketing@surency.com**.

A confirmation email will be sent to the individual(s) requesting access when access is ready. If you have any problems logging in, please contact the Sales department at 800-264-9462 or via email at marketing@surency.com. If you have any questions regarding your employees' eligibility, you may contact the Surency Eligibility department at 888-316-5986.

If there is a change in administrative levels or new access is needed, please resubmit this form.

800-264-9462 • Surency.com



Surency Flex- Employer Portal Registration Form

(Please retain a copy of this completed form for your record)

After online enrollment has been setup and confirmed, you will be able to access the Surency Flex Employer Portal with your username and password. This will provide you access to your group's plan design, to online eligibility and to send payroll and enrollment files, depending on your selection(s).

Surency Flex - Employer Portal

Complete this form to have access to your **Surency Flex Employer Portal**. It is recommended that no more than three (3) individuals be authorized to access the data. If a change in administrative levels or new access is needed, please resubmit this form.

Group Name: _____ Group Number: _____

Administrative Users:

Please indicate all contacts and their Administrative Level(s). See descriptions of Administrative Levels on the first page.

Date	Contact Name	Email Address	Phone	Administrative Level <small>Please indicate the corresponding numbers below.</small>

*Note: You can choose to have access to more than one Administrative Level.
Example: (1-6), (2-4), (2,4,6)*

Name: _____ Phone Number: _____

Email Address: _____ *(this is the email address that will be used to log in to your Employer Account)*

User Signature: _____ Date: _____

Employer authorization for Broker/Agency online access: (if applicable)

Print Name: _____ Date: _____

Employer Signature: _____

Once access has been activated, an email will be sent to inform each contact of their Username and Password and instructions on how to log in to your Surency Flex Employer Portal. Following the first successful log in, users will be prompted to change their password and choose a security question.

Internal Use Only:

Set up by: _____ Date: _____

Disclaimer: It is the employer's responsibility to notify Surency immediately in writing, via fax 316-462-3329 or email marketing@surency.com, when an employee's access to online services should be terminated. Surency shall not be held liable for any unauthorized access to the group's online services, or online changes made to the group's benefits and eligibility unless the employer has submitted written notification to Surency prior to any unauthorized access.

**Return completed form back to Surency at email: marketing@surency.com
or fax: 316-462-3329
800-264-9462 • Surency.com**



Surency Flex-Bills Account Registration Form

(Please retain a copy of this completed form for your record)

Complete this form to access your billings online at Surency.com.
Fill out one form per person.

Online Billing (Surency Flex - Bills Employer Account)

GROUP NAME

GROUP NUMBER

(Use all 18 digits of group number; each group and/or subgroup has an individual group number and must be listed)

I am replacing the main billing account

I am an additional user

Create a Temporary Password*:

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Password requirements:

- Minimum of eight (8) and a maximum of 15 characters
- at least one (1) uppercase letter
- at least one (1) lowercase letter
- at least one (1) number

***Following the first successful log in, users will be prompted to change their password and to choose a security question.**

Name: _____ Phone Number: _____

Email Address: _____ (this is the email address that will be used to log in to your Employer Account)

User Signature: _____ Date: _____

Disclaimer: It is the employer's responsibility to notify Surency immediately in writing, via fax 316-462-3329 or email marketing@surency.com, when an employee's access to online services should be terminated. Surency shall not be held liable for any unauthorized access to the group's online services, or online changes made to the group's benefits and eligibility unless the employer has submitted written notification to Surency prior to any unauthorized access.

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