COMPLIANCE MANAGEMENT SERVICES

ONLINE ACCOUNT GUIDE

BASIC®

ONLINE ACCOUNT GUIDE

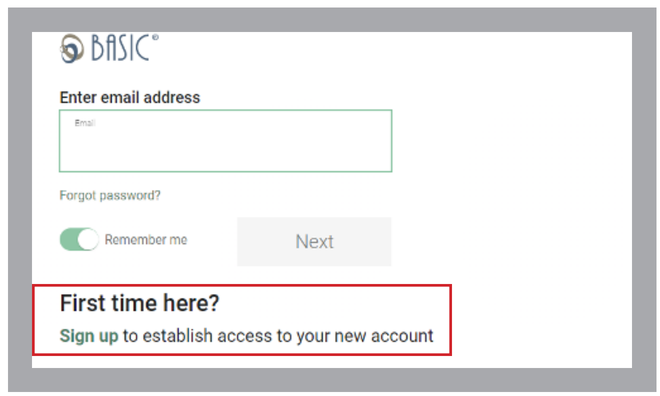
This guide covers how to establish access to your account and utilize the features and functions available to you as a Compliance client in our secure, state-of-the-art system and user experience.

If you have other BASIC offerings, you will already be familiar with the platform, however this guide may be a helpful refresher on certain areas.

Sign Up / Sign In

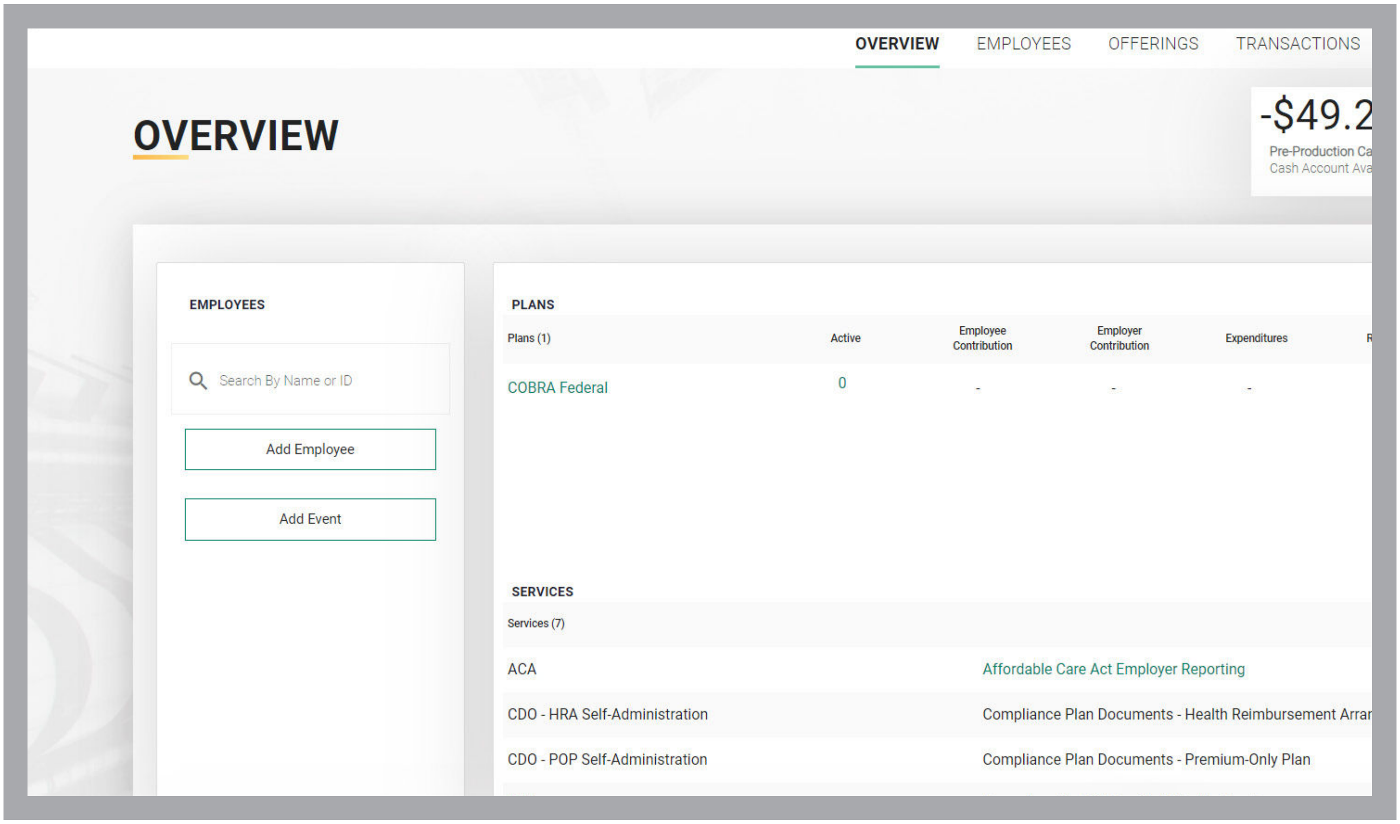
Please note, Google Chrome is the preferred web browser for client account access.

Go to cdaclient.basiconline.com to get started. If this is your first time accessing your account, you will need to complete the **Sign Up** process first. On that page, below the **First time here?** prompt, click the **Sign Up** link.



- Enter your email address and create a password.
- Read through and agree to the **Terms of Use**.
- Enable **Two-Factor Authentication** to complete the process.

Once you've done that, you can return to the **Sign In** page to access your account.



Overview

When you sign in, you will come to the Overview page. If you have other BASIC offerings, you will see those listed under the **Plans** heading.

Your Compliance offerings will be listed below, under **Services**.

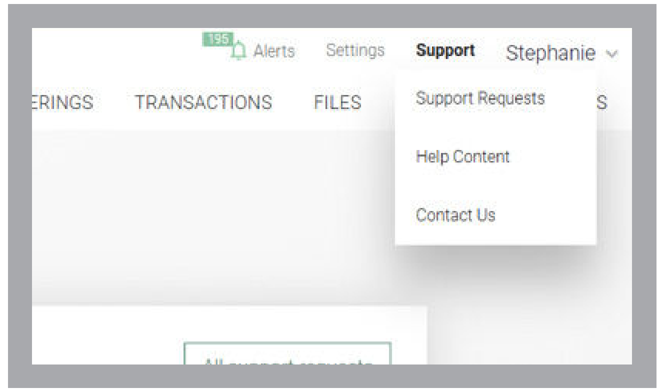
If you have ACA or FMLA, you will find a login link to the same administrative systems you currently use for those offerings.

Otherwise, use the top navigation menu to access **Support**, **My Documents**, and **Invoices**.

Support Requests

You can get support for your Compliance offerings (and all other BASIC offerings) online via our secure, two-way communication system.

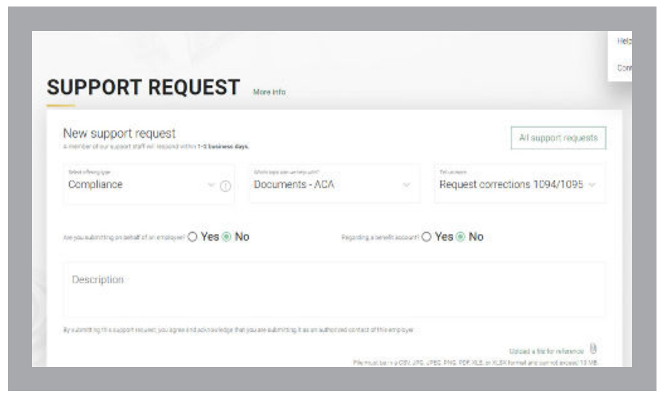
Select **Support** from the top menu and then **Contact Us** to submit a new support request.



First, select **Compliance** as the offering type. Next, choose from a list of common support topics from the drop-down menu.

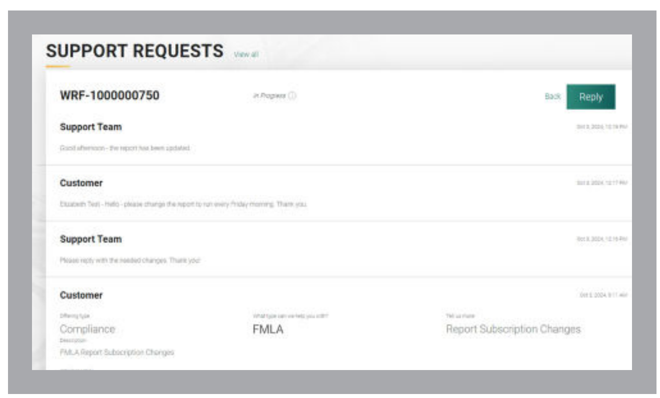
Based on your topic selection, you will be presented with a focused set of related sub-topics. Choose the one that fits best.

Indicate whether you're submitting the support request on behalf of someone, or about an account. Describe your support request in the box provided, upload a file for reference (optional) and click **Submit**.



Also under **Support** you can select **Support Requests** to view a detailed status of each of your support requests and communicate with BASIC support staff regarding a support request.

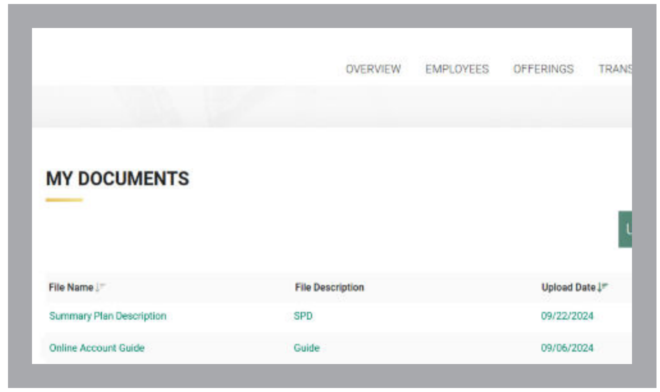
You may submit a new support request from this screen as well by clicking the **Create Support Request** button on this page.



My Documents

Select **Files** from the top menu and then **My Documents**. This area is where we will be able to securely share regulatory materials (e.g., plan documents) in one centralized, controlled environment.

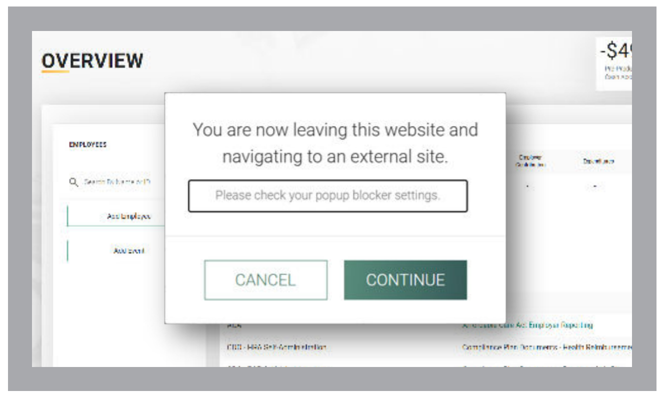
You can also use the **My Documents** library to house your own documents for easy, secure access.



Invoices

Select **Invoices** from the top menu, then choose any of the options listed to view the billing information for your Compliance (and other BASIC) offerings.

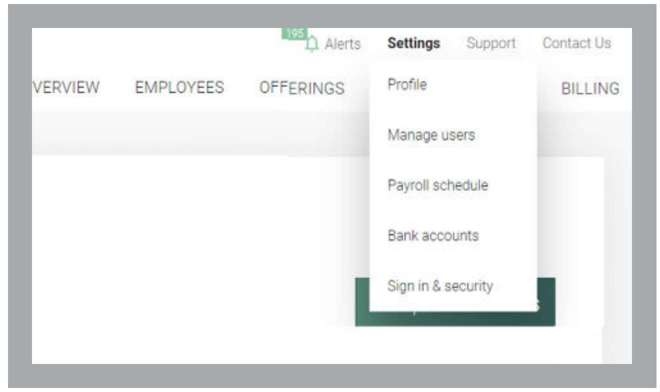
Note these are accessed via an external site, so you will see a notification like the one shown at right.



Settings

This is where you'll go to find important information about your account and to manage access for you and others.

Some information—your **Profile**, **Payroll Schedule**, and **Bank Accounts**—is view-only. Submit a support request if you need to make changes to that information.

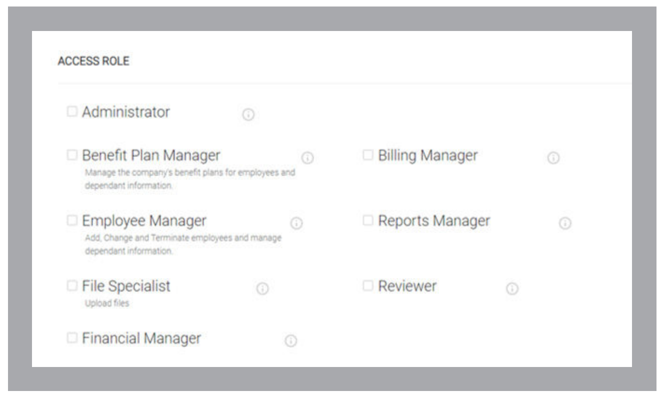


Setup User Access

Select **Manage Users** to see a list of all authorized contacts for your account with their ID, business function and access role.

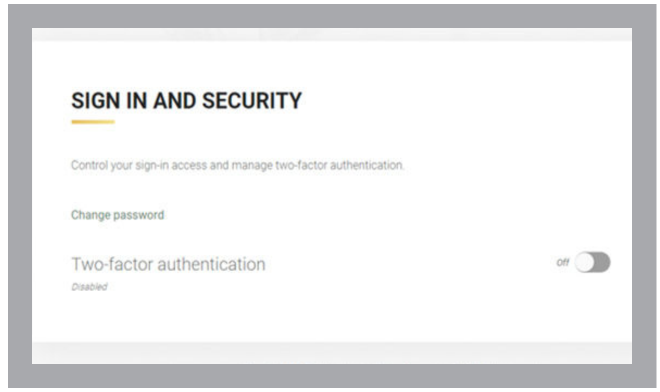
If you are accessing your new account in our web platform for the first time, it's important to review your list of contacts for accuracy.

To add a new user, click the **Setup User Access** button and enter the new user's contact information, user type (**Employee** or **Distributor**) and **Position**, then select their **User Access Role** from the list. These roles govern what those users can access and what we are allowed to discuss with them.



Sign In & Security

In this area, you can change your password and manage **Two-Factor Authentication**.



Sign Out

When you are finished, select your name from the top menu and click **Sign Out** to securely exit your account.

If you manage multiple accounts, sign in again and select another account from the drop-down list.

BASIC Benefits, LLC
www.basiconline.com
800.372.3539