Benefits Portal Help Document

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Scope

Employee Benefits Portal is a portal through which an employee can avail flexi benefits such as Meal Pass Card (Happay), Vehicle Running & Maintenance, and Children's Education Allowance (CEA). This portal gives employees the liberty to choose the benefits so that employee can avail income tax relief.

AUDIENCE

This document is intended for all the employees to help them opt for the different plans as per the tax regime.

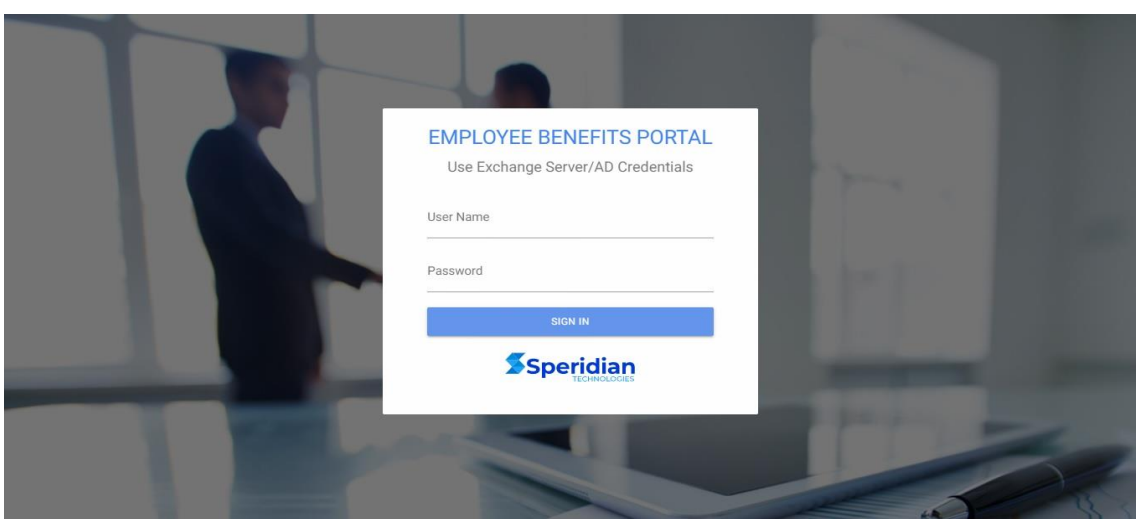
USER GUIDE

This User Manual provides a detailed description of all the Benefits Portal features. Let's get started!

URL: https://benefits.speridian.com

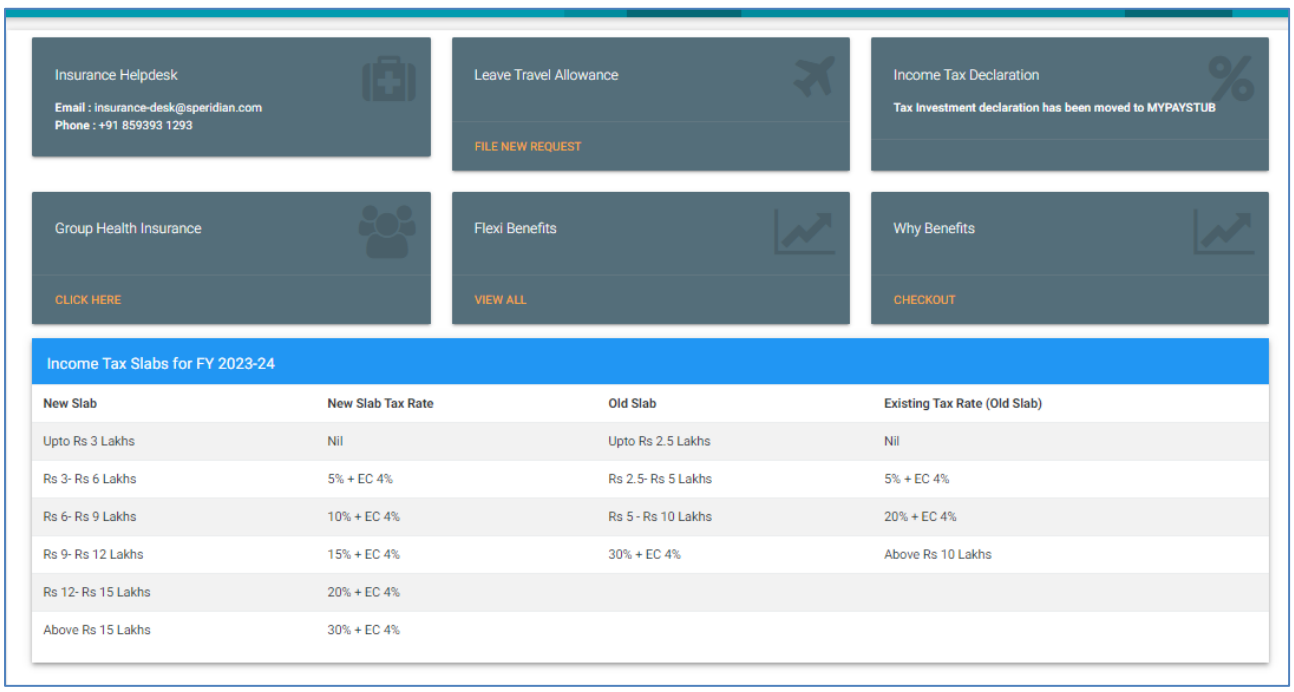
Login Screen

When you enter the URL, you will be directed to the Login screen. Use your AD credentials to login.



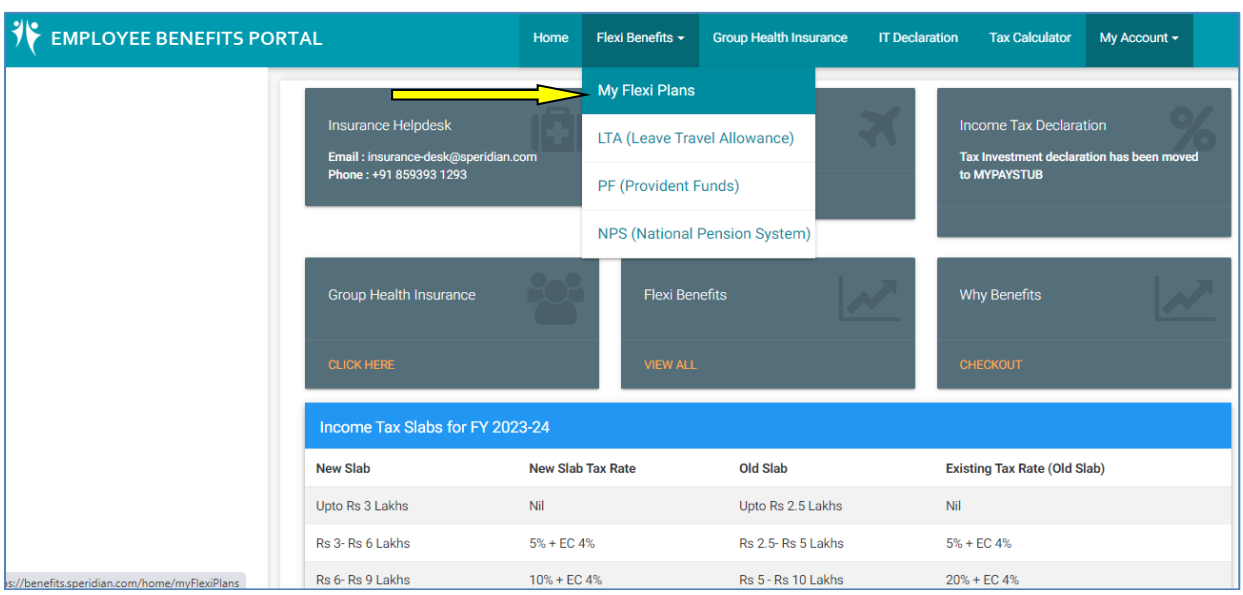
Landing Page

This page displays the Benefits portal.



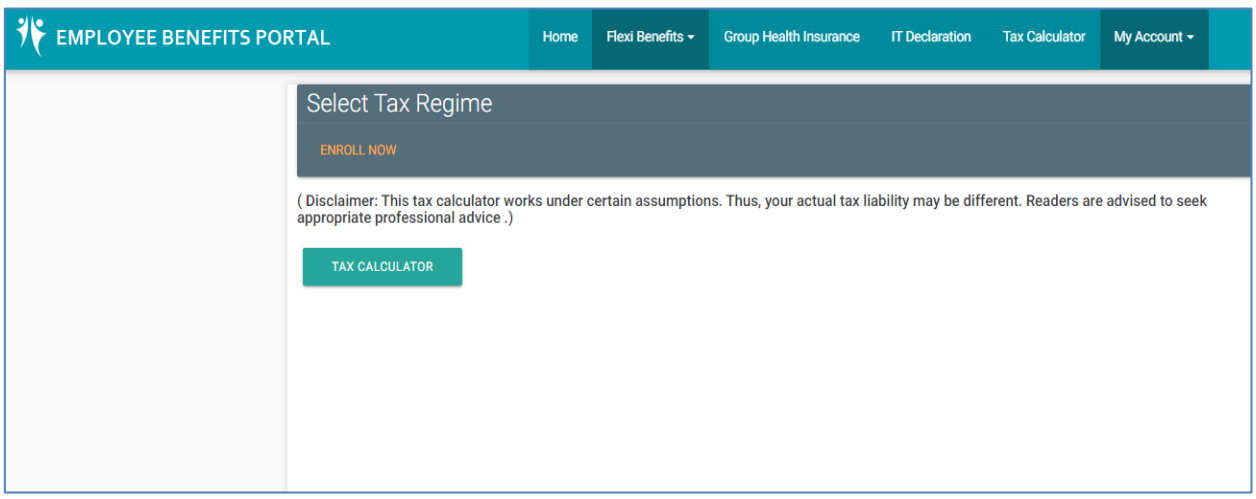
How to choose Tax Regime

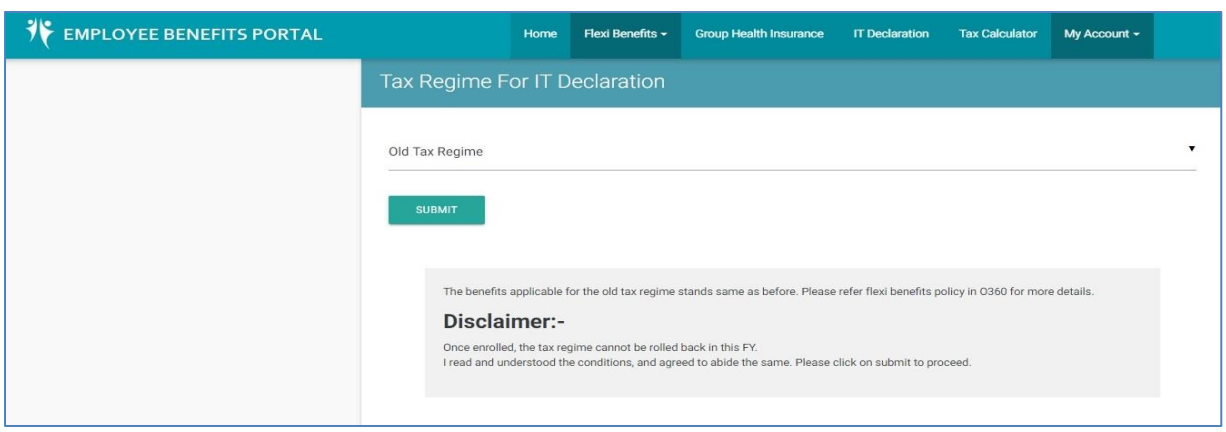
Click on **'Flexi Benefits'** drop down and choose **'My Flexi Plans'**

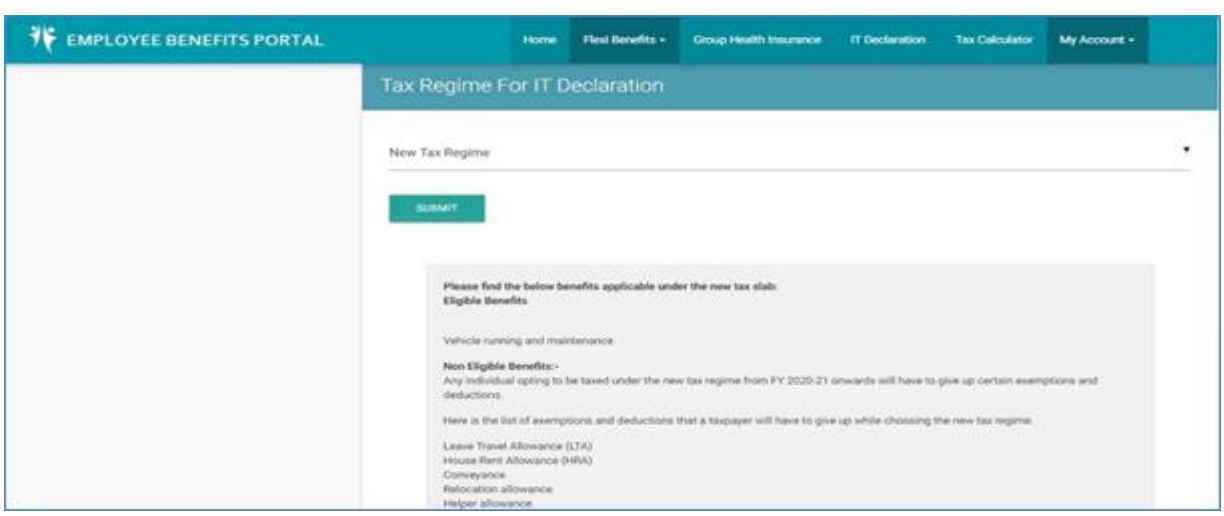


Select the tax regime

Select the tax regime options available from the drop down button and submit to view your benefits. You can also use the tax calculator option to get indicative tax amount under old/new tax regime.





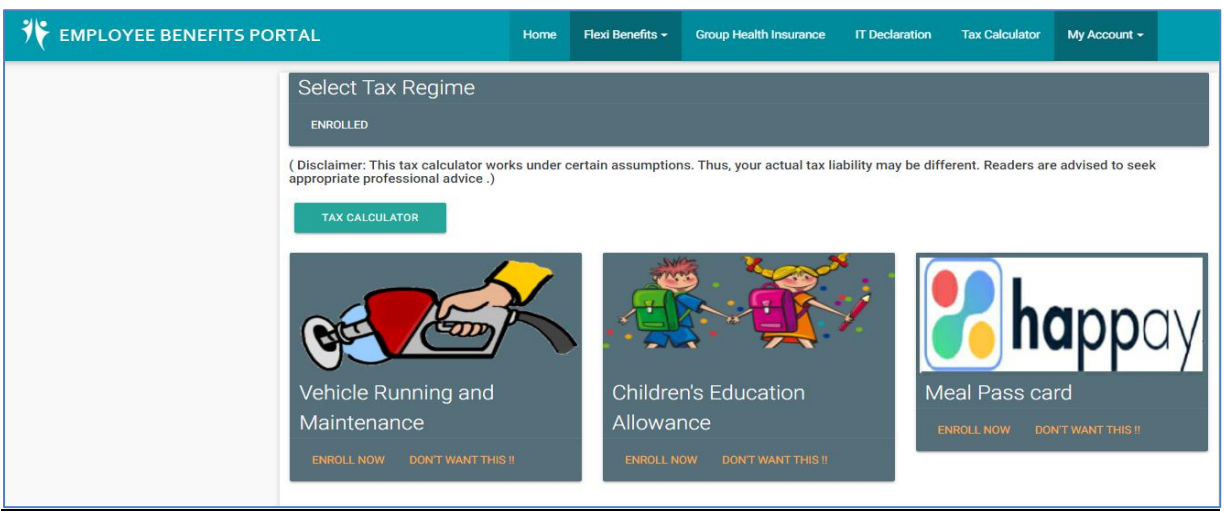


The three flexi benefit plans are displayed named **'Happay Meal Card',**

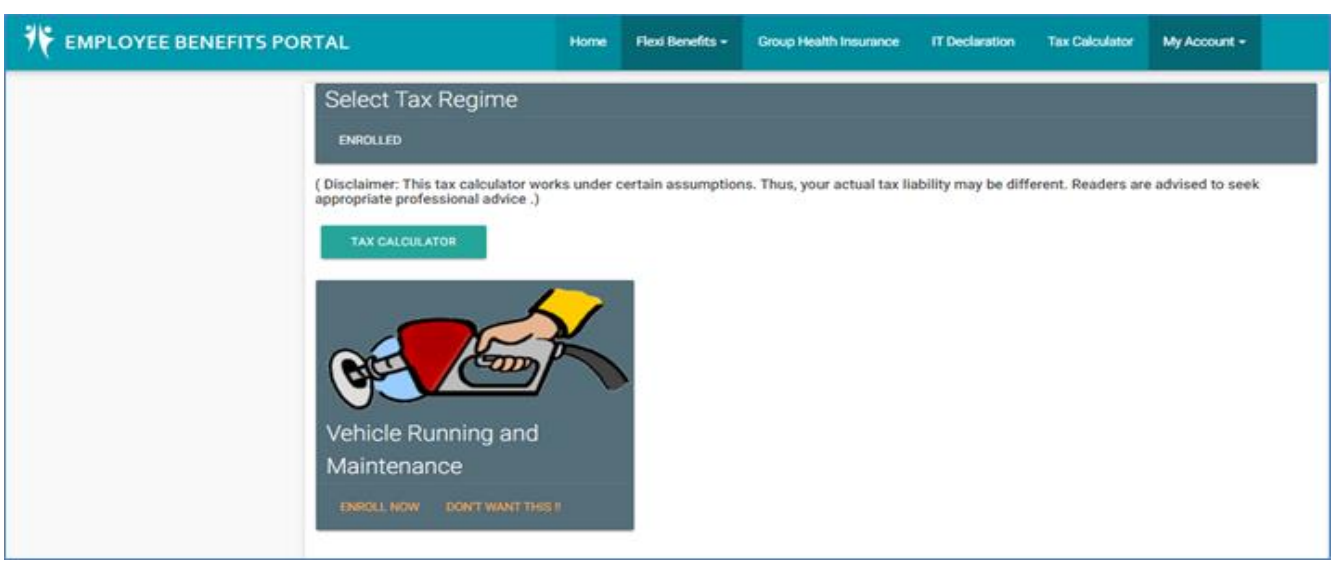
'Vehicle Running and Maintenance' and **'Children Education Allowance'**. The user can either opt or not opt for the benefits.

Note: Vehicle Running and Maintenance and Children Education Allowance will be visible only for eligible employees and based of tax regime selection (refer flexi benefits policy for eligibility criteria).

For Old tax regime



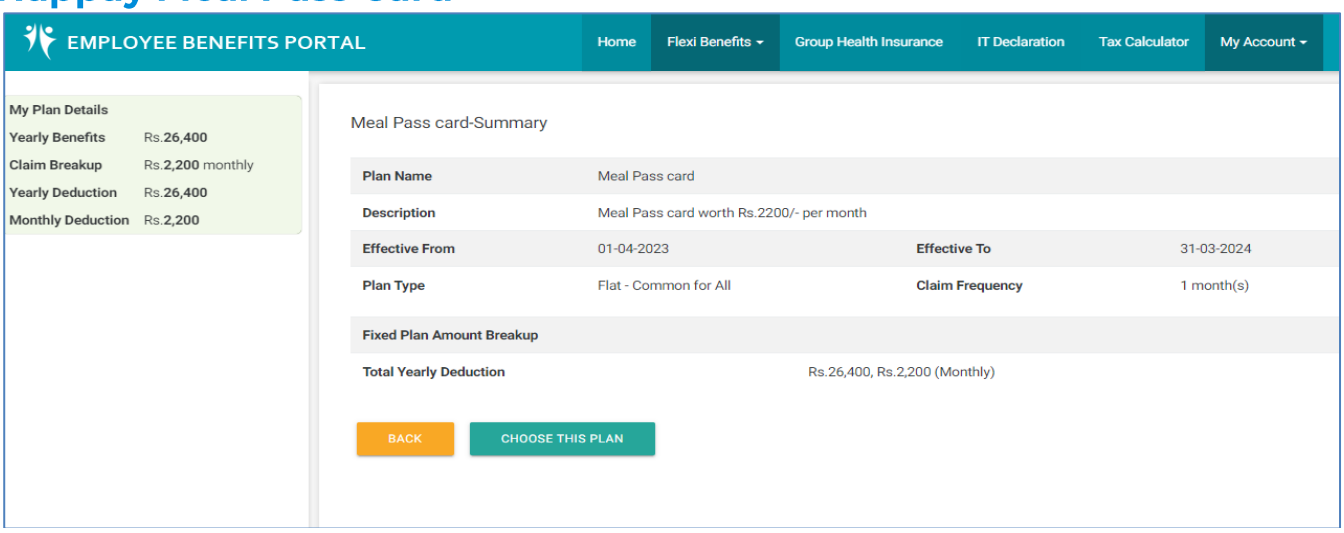
For New tax regime



When the user click on **'Enroll Now'** button**,** the details of the flexi benefit plans are displayed as below:

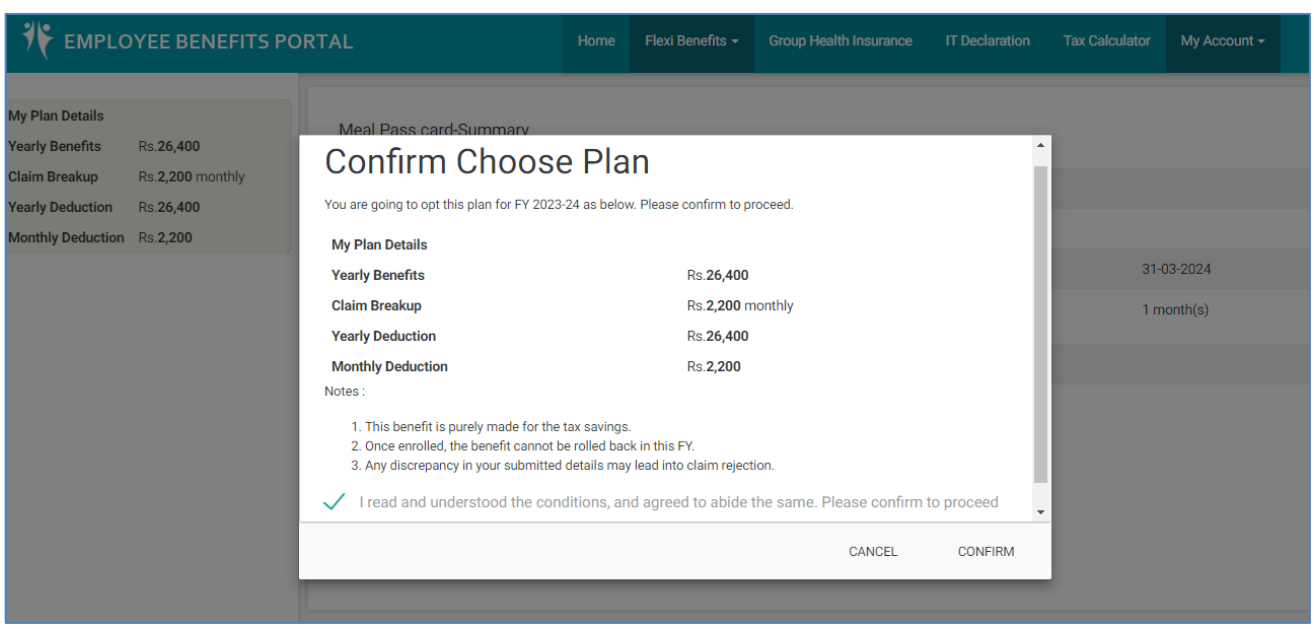
How to choose Flexi Benefits

Happay Meal Pass Card



Click on **'CHOOSE THIS PLAN'**

A pop-up window appears to confirm the selection.



Click on **'CONFIRM"** after going through the notes and tick mark the declaration.

The status will be displayed as follows, and will be able to view details on approval:

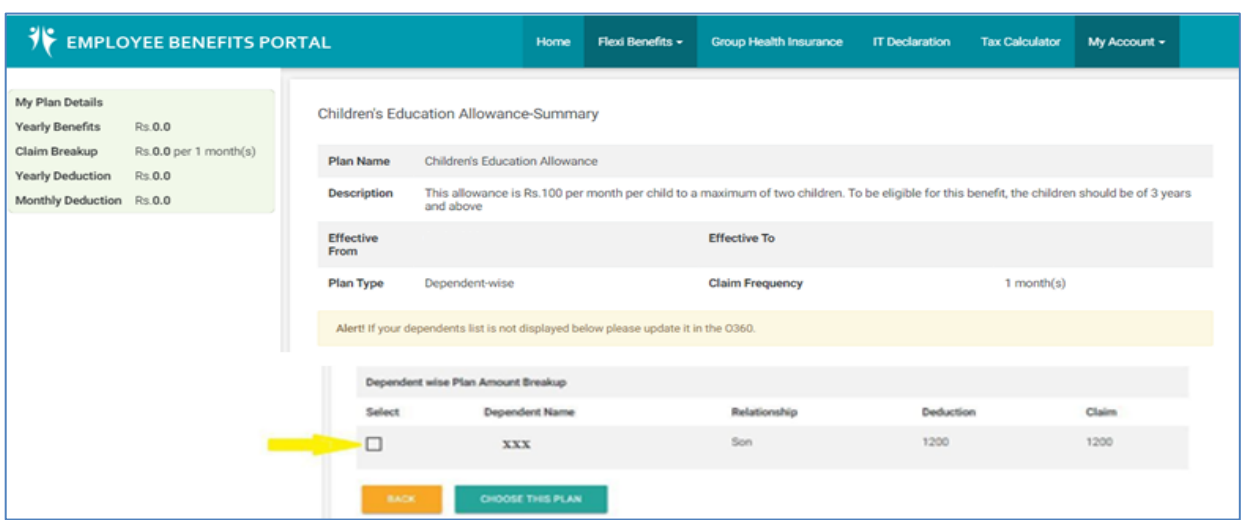
Children Education Allowance

For opting this benefit you need to add your dependent (child above 3 years) in O360 first and get it approved by HR (User guide attached).

Opt your dependent from the dependent list and click on **'CHOOSE THIS PLAN'**

Deduction details for the plan will be visible on selecting the dependent

A pop-up window appears to confirm the selection

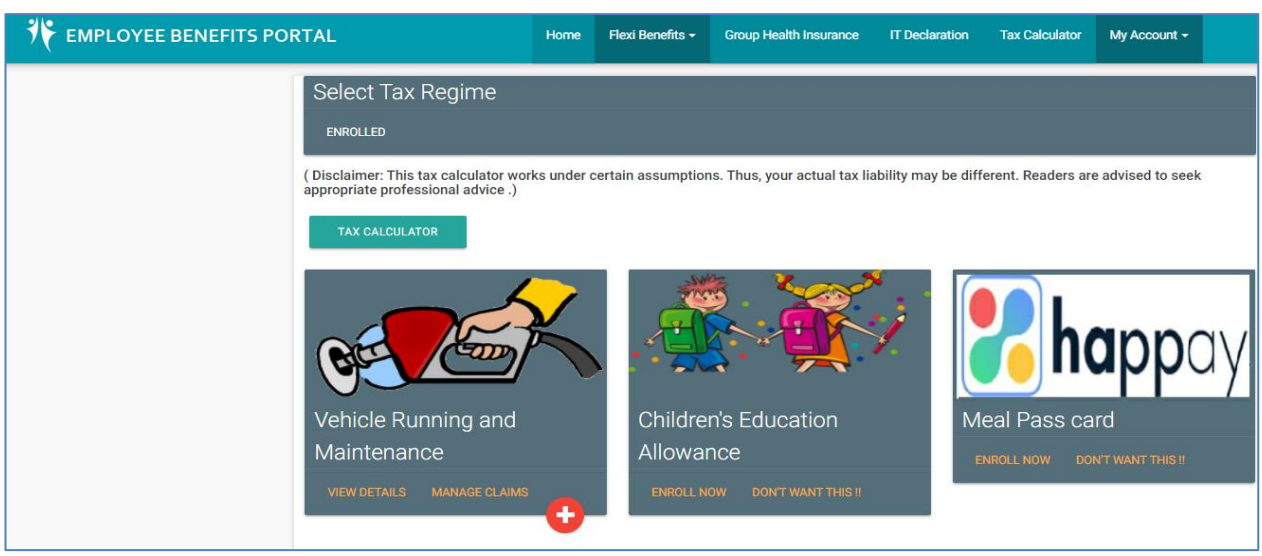


Click on **'CONFIRM"** after going through the notes and tick mark the declaration. The status will be displayed as follows, and will be able to view details on approval.

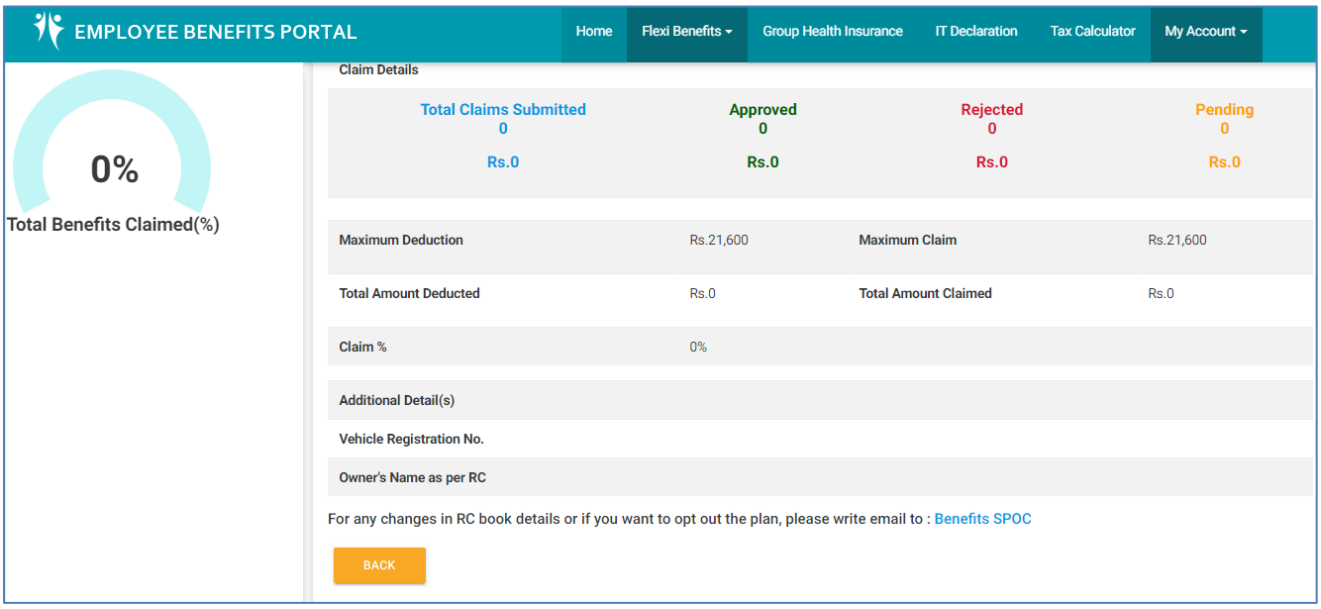
Vehicle Running and Maintenance

Existing users (Only visible for eligible employees as per the policy)

Resources those who have already enrolled vehicle reimbursement module will be able to view details directly without adding RC book details afresh.



If in case of any of any changes in RC book or if you want to opt out the plan then kindly click on Benefits SPOC in view details to write an email to benefits team for the changes in the plan.



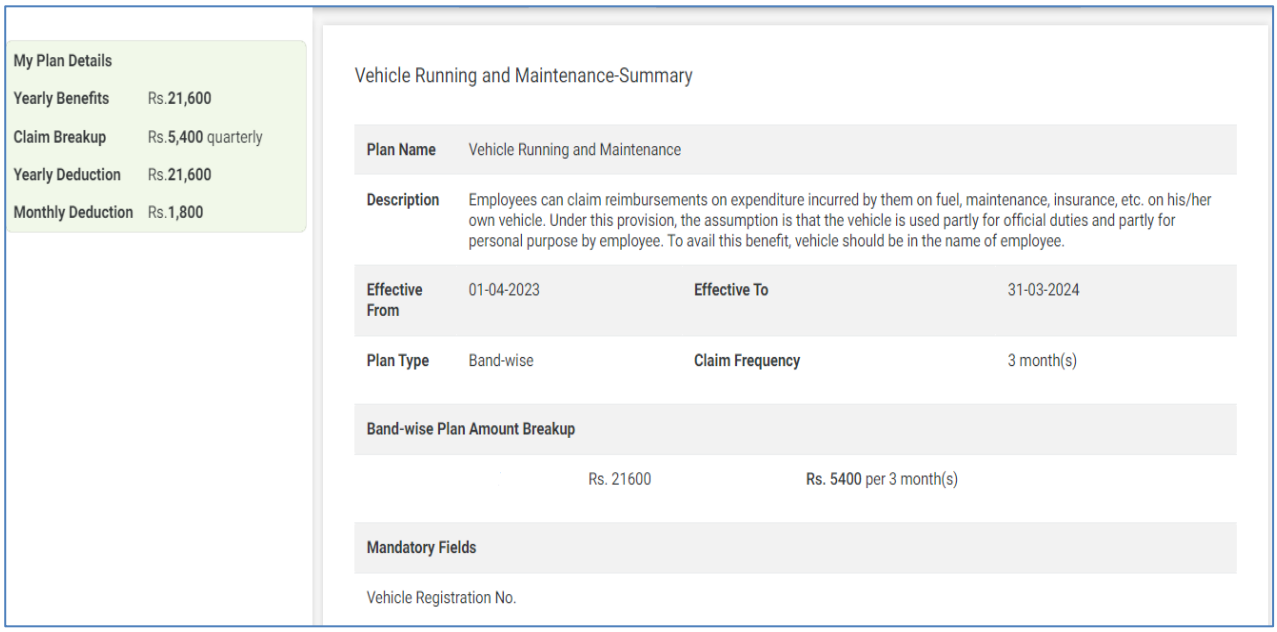
New users <u>(Only visible for eligible employees as per the policy)</u>

Click on **'Enroll Now'** button

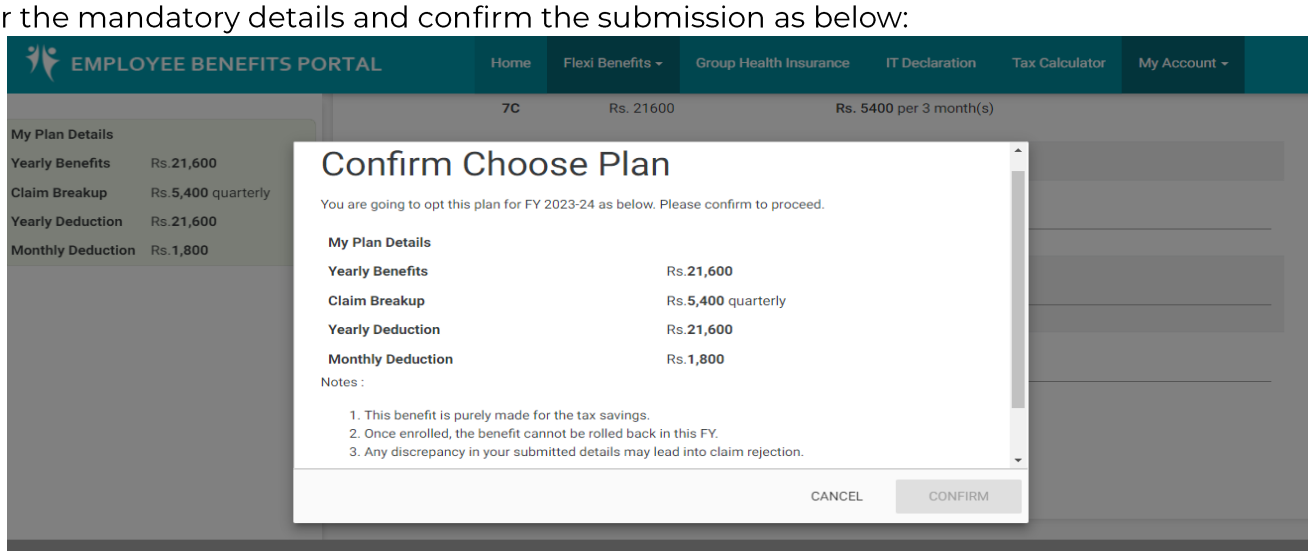
Plan details will be shown as per the eligibility before you enter your details:

Details required for the enrollment is shown on the same page as below. Enter the following details:

- Vehicle number
- Owner name
- Secondary vehicle (if any)
- For approval, click on Benefits SPOC to send you RC book via email.

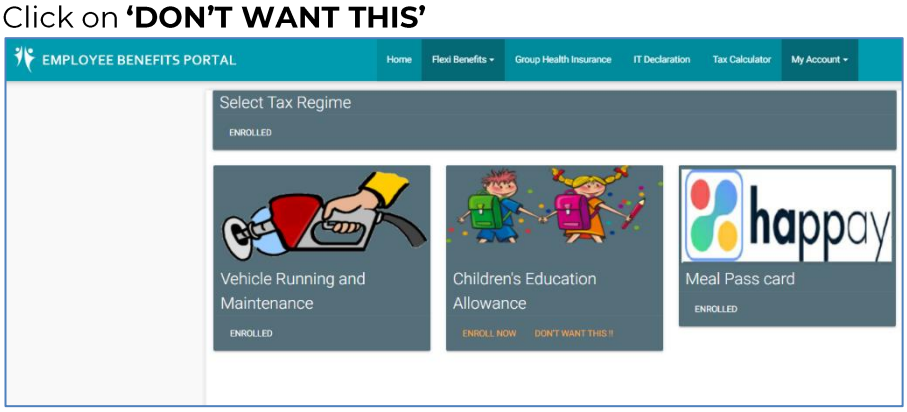


Enter the mandatory details and confirm the submission as below:

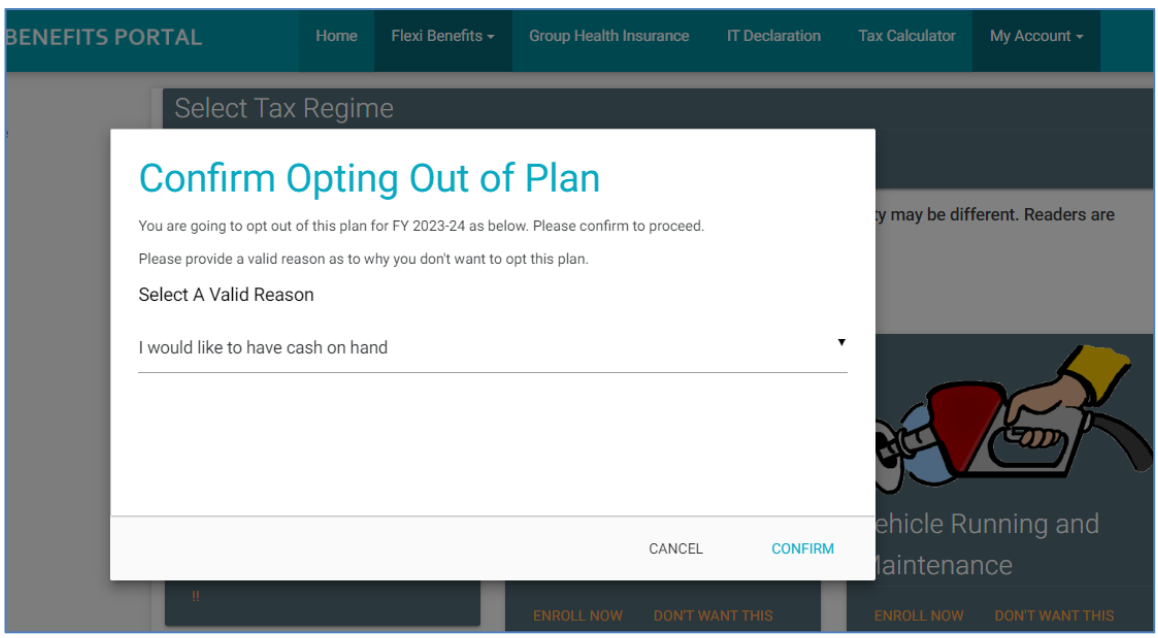


Opting out the flexi benefits

Click on **‘DON’T WANT THIS’**



A pop-up window appears to confirm the opting out of plan.



NOTE: The user should select a valid reason to opt out from the selected plan.

Click on **'Confirm'** button.

Happy Enrollment!!!!