Employer Portal Quick Reference Guide

Statuses

The WealthCare Administration (WCA) system has recently undergone a refresh and redesign of the administrator user interface. The new user interface aims to simplify and streamline employer and administration system workflow – to provide a better user experience while using the platform.

To help you familiarize yourself with the new system interface, we've developed this quick reference guide to help navigate the system.

This quick reference guide explains how to update statuses for:

- Employees
- Dependents
- Cards

Contents

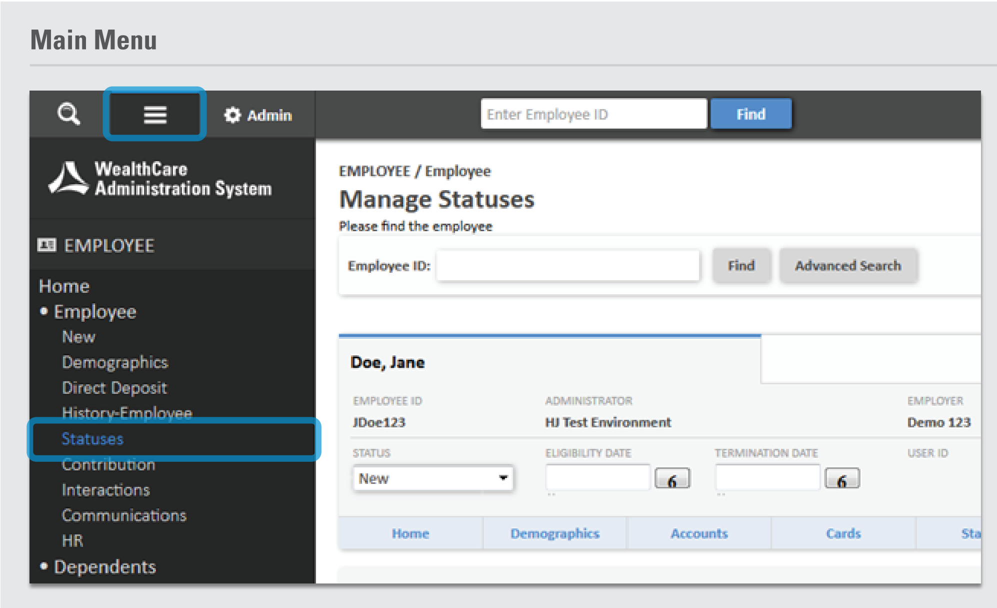
Navigation

The easiest way to update employee and dependent status information is from the 'manage statuses' page in the WealthCare Administration employer portal. The new user interface simplifies the workflow of managing these core updates.

Main Menu

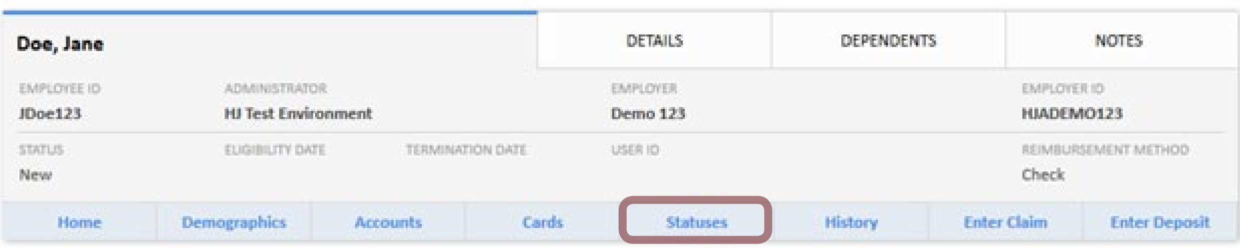
The 'manage statuses' page can be located on the employee section of the main menu as shown below:

Main Menu ❯ Employee ❯ Employee ❯ Statuses



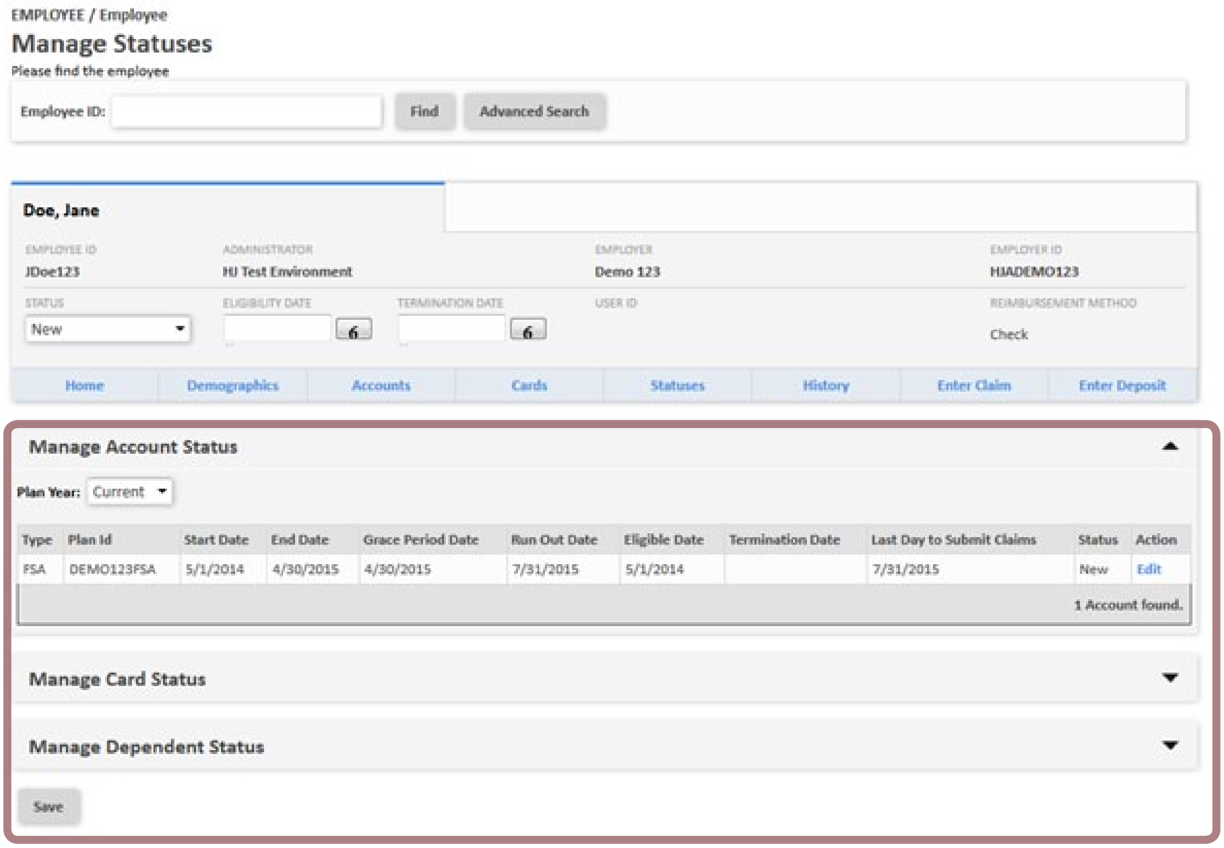
'Selected Employee' Footer

Additionally, you can access the 'manage statuses' page by clicking on the 'status' link in the footer of the new 'selected employee' section, as highlighted below. Once an employee has been selected, this section will appear on many other employee-centric screens throughout the application, allowing for instant accessibility to information about the selected employee.

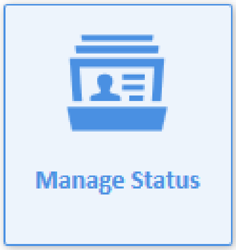


Manage Statuses Page

From the ‘manage statuses’ page, you can update employee & dependent statuses, enter eligibility dates on the account level, and change the status of any card.

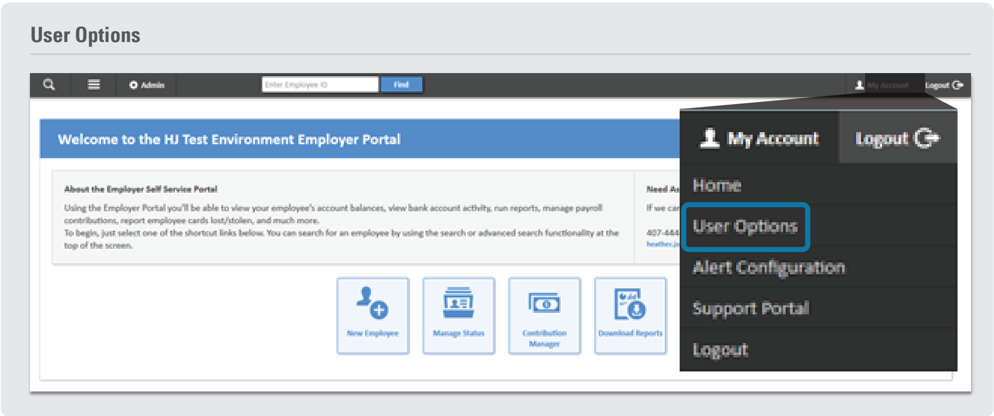


Personalized User Navigation Tiles

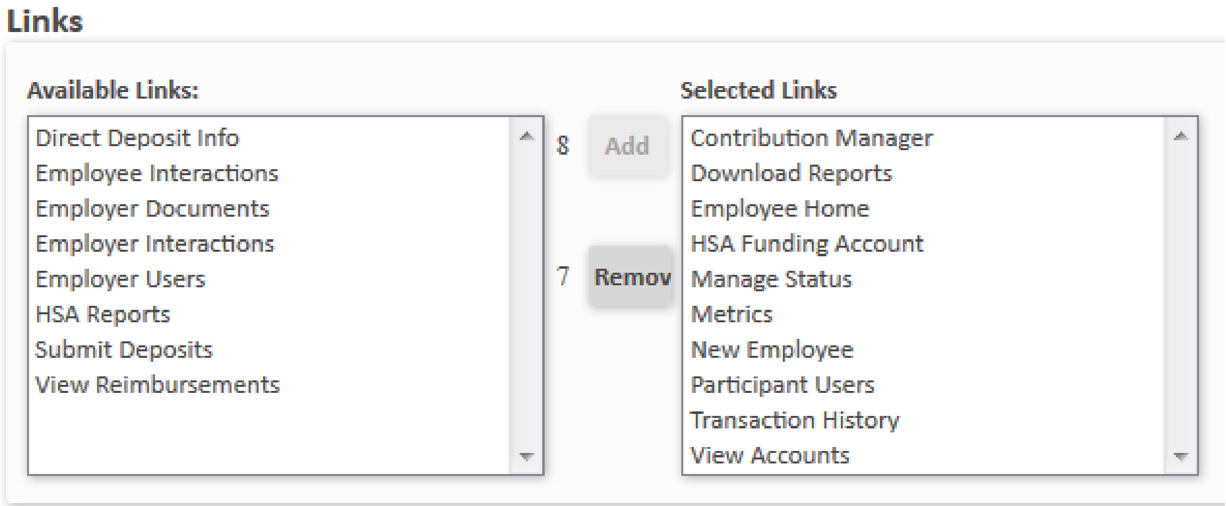


Access to some of the pages and screens mentioned throughout this document is now easier than ever. Thanks to the new personalized user navigation tiles, users can now customize up to 10 shortcuts for easy access – from anywhere within the application. This powerful new level of customization allows individual employer users instant access to their most frequently used pages, eliminating the need to click through multiple menus.

Users can select their shortcut tiles using the ‘my account’ menu, found under the ‘user options’ button, as shown below:



Within this option menu, users can specify their preferred shortcuts, by toggling to add and/or remove tiles, as shown below:



Once configured, navigation tiles will appear on the application home page, as well as the new WealthCare Administration system navigator. To access the WealthCare Administration system navigator, select the magnifying glass in the upper left corner of any application page.