



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

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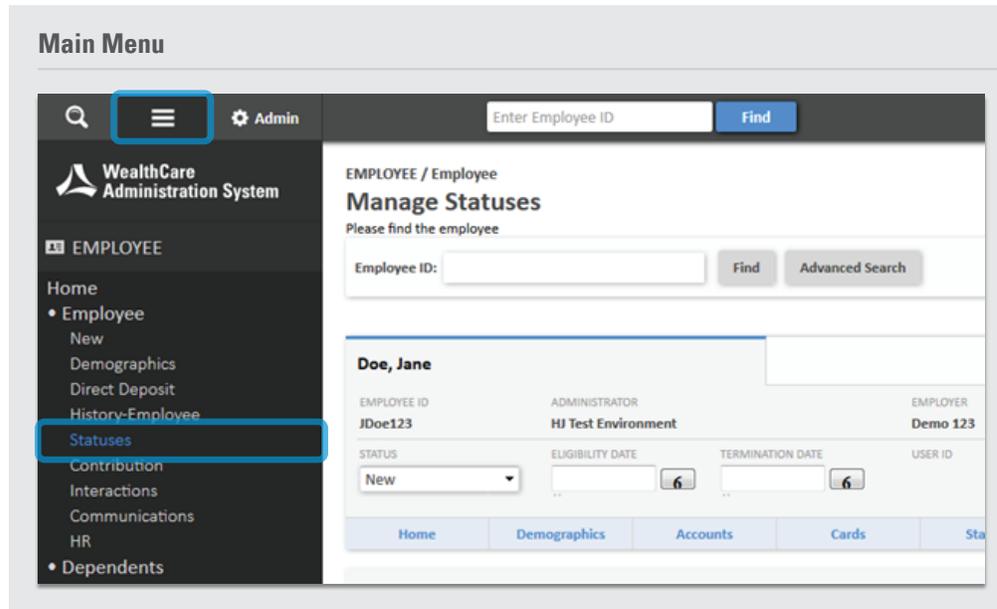
Navigation

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

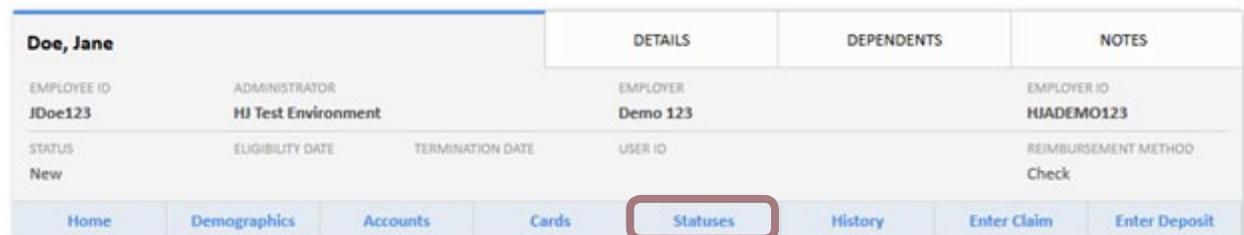
The 'manage statuses' page can be located on the employee section of the main menu as shown below:

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.

EMPLOYEE / Employee
Manage Statuses
Please find the employee

Employee ID:

Doe, Jane

EMPLOYEE ID JDoe123	ADMINISTRATOR HJ Test Environment	EMPLOYER Demo 123	EMPLOYER ID HJADEMO123
STATUS New	ELIGIBILITY DATE <input type="text"/> 6	TERMINATION DATE <input type="text"/> 6	REIMBURSEMENT METHOD Check

[Home](#) [Demographics](#) [Accounts](#) [Cards](#) [Statuses](#) [History](#) [Enter Claim](#) [Enter Deposit](#)

Manage Account Status

Plan Year: Current

Type	Plan Id	Start Date	End Date	Grace Period Date	Run Out Date	Eligible Date	Termination Date	Last Day to Submit Claims	Status	Action
FSA	DEMO123FSA	5/1/2014	4/30/2015	4/30/2015	7/31/2015	5/1/2014		7/31/2015	New	Edit

1 Account found.

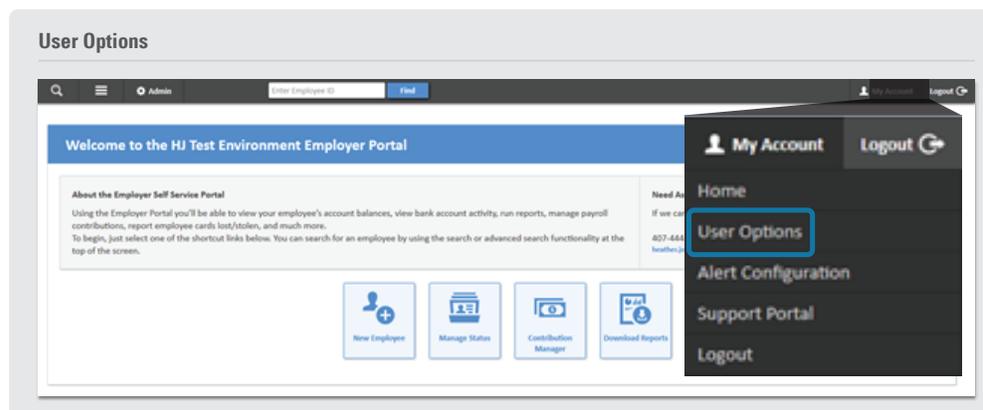
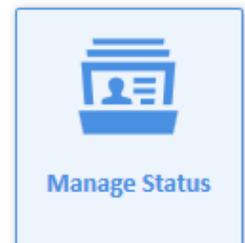
Manage Card Status

Manage Dependent Status

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:

Links

The 'Links' configuration interface consists of two main sections: 'Available Links' and 'Selected Links', separated by 'Add' and 'Remove' buttons. The 'Available Links' list includes: Direct Deposit Info, Employee Interactions, Employer Documents, Employer Interactions, Employer Users, HSA Reports, Submit Deposits, and View Reimbursements. The 'Selected Links' list includes: Contribution Manager, Download Reports, Employee Home, HSA Funding Account, Manage Status, Metrics, New Employee, Participant Users, Transaction History, and View Accounts. The 'Add' button is positioned between the two lists, and the 'Remove' button is positioned below it.

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.

The application home page features a top navigation bar with a search icon, a menu icon, an 'Admin' button, and a search input field labeled 'Enter Empl'. Below the navigation bar is a 'LINKS' section with a 'Refresh Current Page' button. The 'LINKS' section contains a grid of ten navigation tiles: Employee Home, New Employee, Transaction History, Manage Status, View Accounts, HSA Funding Account, Contribution Manager, Metrics, Download Reports, and Participant Users. Below the 'LINKS' section is an 'EMPLOYER SEARCH ALL' section with a search input field labeled 'Search Employers' and a 'Find' button. Below the 'EMPLOYER SEARCH ALL' section is an 'EMPLOYEE DEPENDENT' section with a 'SEARCH BY' dropdown menu set to 'Employee ID' and a search input field labeled 'Enter Employee ID' with a 'Find' button.