



Employer Portal Quick Reference Guide

Adding a New Employee

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.

This quick reference guide covers how to access the following screens within WealthCare Administration:

- New Employee
- New Dependent
- Benefit Accounts for Employees and Dependents
- Benefit Cards for Employees and Dependents

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New Employee

All Employee-related pages are grouped under the Employee section of the new Main Menu. To add a new employee, click the “New” link under the Employee sub-section of the Employee menu. This will take you to the New Employee page. The content of this page has not changed from the previous user interface, as you can see below.

Main Menu > Employee > Employee > New

New Employee Main Menu

EMPLOYEE / Employee

New Employee

Admin: HJ Test Environment | Employer: Demo 123

Demographic Information

Name Prefix: Mr. | First Name*: Samuel | Initials: |

Employee ID*: 333777555 | Employee Status: |

Billing Address:

Address 1*: 123 Any St.

Address 2: |

City*: Orlando | State*: Florida | Zip: |

Country*: United States

Similar to the previous user interface, once new employee data is entered and saved, you will be routed to a screen that allows you easy access to add HR information, a card, benefit accounts, and dependents.

New Employee

Employee was saved successfully

Employee	HR Info	Card	Benefits	Dependents
Mason, Samuel	Add HR Information	Add Card	Add Benefits Accounts	Add Dependents

New Dependent

A new dependent can also be added via the "New" link under the Dependents subsection of the Employee menu, as seen below.

New Dependent Main Menu

The screenshot displays the 'New Dependent' main menu. The left sidebar contains the 'EMPLOYEE' menu with 'Dependents' and 'New' highlighted. The main content area shows the 'New Dependent' form for employee Samuel Mason, including search fields and a 'New' button.

New Benefit Accounts

To add benefit accounts for employees or dependents, expand the Benefit Account subsection of the Employee menu as shown below. The "Benefit Account" link gives you access to add benefit accounts for employees; and the "Dependent Account" link allows you to add benefit accounts for dependents. Both screens contain content identical to the previous interface.

New Benefit Accounts

The screenshot displays the 'New Benefit Accounts' main menu. The left sidebar contains the 'EMPLOYEE' menu with 'Benefit Account' and 'Dependent Account' highlighted. The main content area shows the 'Benefit Accounts' form for employee Samuel Mason, including search fields and a table of accounts.

Type	Plan Date	PlanId	Type of Funds	Annual Election	Contrib YTD	Other Deposits	Disb YTD	Avail Bal	Auth	Disb. Bal
<input type="checkbox"/>										

New Cards

To add a card for employees or dependents, expand the Cards subsection of the Employee menu. As in the other screens covered in this document, the content is the same as the previous user interface.

The screenshot shows the 'New Cards' page in the WealthCare Administration System. The left sidebar is expanded to the 'EMPLOYEE' section, with the 'Cards' sub-menu open, highlighting 'Benefit Card' and 'Dependent Card'. The main content area features a search bar for 'Employee ID' and a 'Find' button. Below the search bar, the details for 'Mason, Samuel' are displayed in a table:

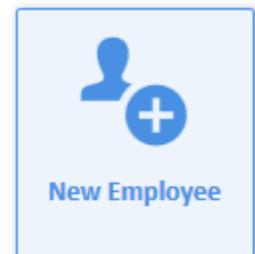
EMPLOYEE / Cards		DETAILS	
Benefit Card			
Please find the employee			
Employee ID:	<input type="text"/>	<input type="button" value="Find"/> <input type="button" value="Advanced Search"/>	
Mason, Samuel			
EMPLOYEE ID	ADMINISTRATOR	EMPLOYER	
333777555	HJ Test Environment	Demo 123	
STATUS	ELIGIBILITY DATE	TERMINATION DATE	USER ID
New			
Home	Demographics	Accounts	

Below the table, a message states: 'No Card issued to this employee. Click NEW button below to create new card.' A red warning note follows: 'This employer is set to Debit Card Optional. Only issue a card if it has been specifically requested.' At the bottom, there are buttons for 'New', 'Temp Inactive', and 'Perm Inactive'.

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:



The screenshot shows the 'User Options' menu in the WealthCare Administration System. The menu is open, showing options like 'Home', 'User Options', 'Alert Configuration', 'Support Portal', and 'Logout'. The 'User Options' option is highlighted with a red box. The background shows the 'Welcome to the HJ Test Environment Employer Portal' page with a search bar and a 'Find' button. Below the search bar, there are four navigation tiles: 'New Employee', 'Manage Status', 'Contribution Manager', and 'Download Reports'.

Under Links, users can select their chosen shortcuts on the left, and click “Add” to toggle them to the right, and save.

Links

The screenshot shows a configuration window for links. It is divided into two main sections: "Available Links" on the left and "Selected Links" on the right. Between these sections are two buttons: "Add" and "Remove".

- Available Links:** A list of links that can be added to the system. The list includes: Direct Deposit Info, Employee Interactions, Employer Documents, Employer Interactions, Employer Users, HSA Reports, Submit Deposits, and View Reimbursements.
- Selected Links:** A list of links that have been chosen for the application. The list includes: Contribution Manager, Download Reports, Employee Home, HSA Funding Account, Manage Status, Metrics, New Employee, Participant Users, Transaction History, and View Accounts.

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 screenshot displays the WealthCare Administration system navigator. At the top, there is a search bar with a magnifying glass icon and a text input field containing "Enter Empl". Below this is a "LINKS" section with a "Refresh Current Page" button. The "LINKS" section contains ten navigation tiles arranged in two rows of five. The tiles are: 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 section with a "SEARCH ALL" button. It features a search input field for "Search Employers" and a "Find" button. Below the search input is a table with two columns: "EMPLOYER NAME" and "EMPLOYER ID". The table contains one row with the values "HJADEMO123". Below the "EMPLOYER" section is an "EMPLOYEE" search section with a "DEPENDENT" button. It features a "SEARCH BY" dropdown menu set to "Employee ID" and a text input field for "Enter Employee ID" with a "Find" button.