



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 following menu items: EMPLOYEE, Home, Employee, Dependents, New, Demographics, Accounts, Cards, PROCESSING, EMPLOYER, PLAN, REPORTS, and USERS. The 'New' item under 'Dependents' is highlighted. The main content area shows the 'New Dependent' form for employee Samuel Mason. The form includes a search bar with 'Enter Employee ID' and a 'Find' button. Below the search bar, there is a 'New' button. The form also displays employee details for Samuel Mason, including Employee ID (33377555), Administrator (HJ Test Environment), and Employer (Demo 123). The form is divided into sections for Home, Demographics, and Accounts.

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 following menu items: EMPLOYEE, Home, Employee, Dependents, Accounts, Benefit Account, Dependent Account, HSA Funding Account, Cards, PROCESSING, EMPLOYER, PLAN, REPORTS, and USERS. The 'Benefit Account' and 'Dependent Account' items are highlighted. The main content area shows the 'New Benefit Accounts' form for employee Samuel Mason. The form includes a search bar with 'Enter Employee ID' and a 'Find' button. Below the search bar, there is a 'New' button. The form also displays employee details for Samuel Mason, including Employee ID (33377555), Administrator (HJ Test Environment), and Employer (Demo 123). The form is divided into sections for Home, Demographics, Accounts, Cards, and Statuses. Below the form, there is a section for 'Accounts' with a table of columns: Type, Plan Date, PlanId, Type of Funds, Annual Election, Contrib YTD, Other Deposits, Disb YTD, Avail Bal, Auth, Disb, Bal.

New Cards

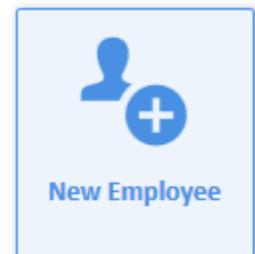
To add a card for employees or dependents, expand the Cards subsection of the Employee menu. As in the other screens covered in this document, the content is the same as the previous user interface.

The screenshot displays the 'New Cards' page. On the left, a navigation menu is visible with the 'EMPLOYEE' section expanded to show 'Cards', which includes 'Benefit Card' and 'Dependent Card'. The main area features a search bar for 'Employee ID' and a 'Find' button. Below the search, the details for 'Mason, Samuel' are shown, including his Employee ID (33377555), Administrator (HJ Test Environment), and Employer (Demo 123). A table lists his status as 'New' and provides buttons for 'New', 'Temp Inactive', and 'Perm Inactive'. A message states: 'No Card issued to this employee. Click NEW button below to create new card. This employer is set to Debit Card Optional. Only issue a card if it has been specifically requested.'

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. The menu is open, displaying options: 'Home', 'User Options' (highlighted with a red box), 'Alert Configuration', 'Support Portal', and 'Logout'. The background shows the 'Welcome to the HJ Test Environment Employer Portal' with a 'My Account' dropdown menu open, showing 'My Account' and 'Logout' options.

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'. The 'Available Links' list contains: Direct Deposit Info, Employee Interactions, Employer Documents, Employer Interactions, Employer Users, HSA Reports, Submit Deposits, and View Reimbursements. The 'Selected Links' list contains: Contribution Manager, Download Reports, Employee Home, HSA Funding Account, Manage Status, Metrics, New Employee, Participant Users, Transaction History, and View Accounts. There are also small numbers '8' and '7' next to the 'Add' and 'Remove' buttons respectively.

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 shows the application home page. At the top is a dark navigation bar with a search icon, a menu icon, an 'Admin' button with a gear icon, and a text input field 'Enter Empl'. Below the navigation bar is a 'LINKS' section with a 'Refresh Current Page' button. It contains ten blue navigation tiles with icons and labels: Employee Home, New Employee, Transaction History, Manage Status, View Accounts, HSA Funding Account, Contribution Manager, Metrics, Download Reports, and Participant Users. Below the links is an 'EMPLOYER SEARCH ALL' section. It has a search input field 'Search Employers' with a 'Find' button. Below that is a table with two columns: 'EMPLOYER NAME' and 'EMPLOYER ID'. The table contains one row with the values 'HJADemo123'. Below the employer search is an 'EMPLOYEE DEPENDENT' section. It has a 'SEARCH BY' dropdown menu set to 'Employee ID' and an input field 'Enter Employee ID' with a 'Find' button.