



Employer Portal Quick Reference Guide

Contribution Manager

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 access the following screens within the WealthCare Administration system:

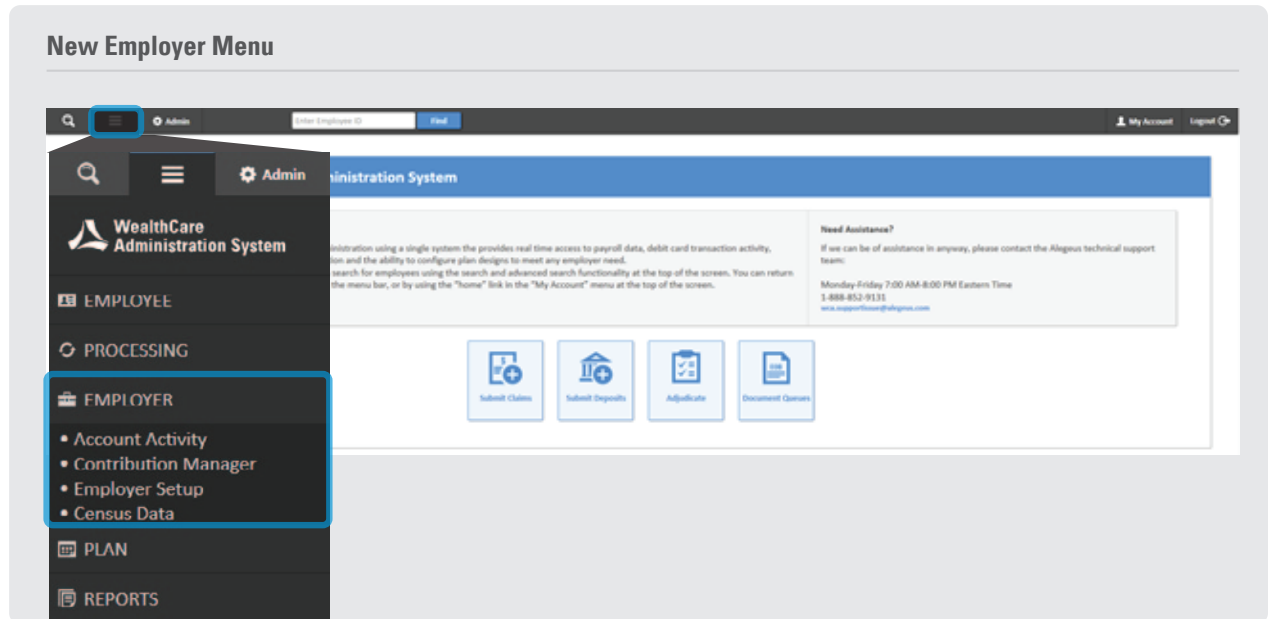
- Employer Contribution Manager
- Payroll Deposit Import

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New Employer Menu

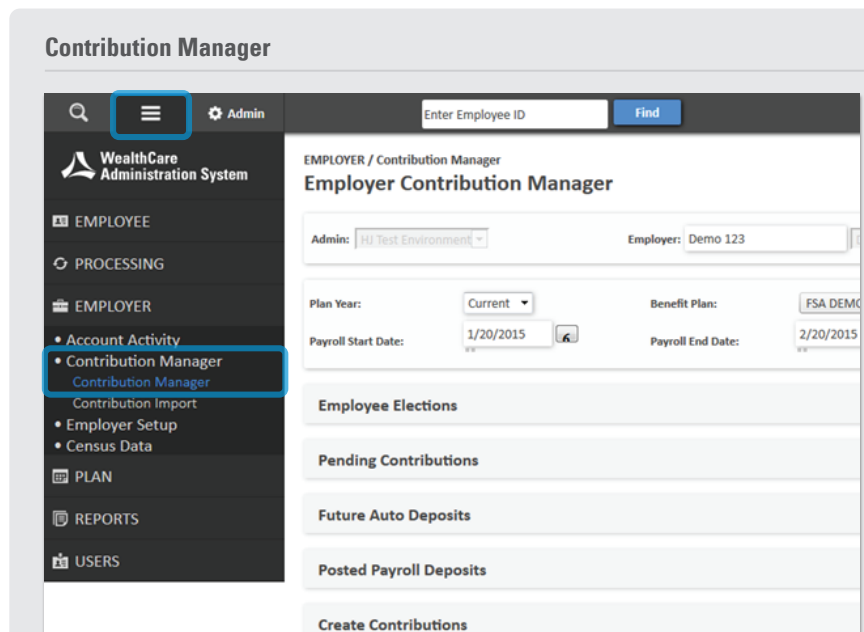
Most pages previously accessed through the Employer Tab in the old user interface can now be found under the Employer section of the Main Menu. This includes all pages related to Contribution Manager.



Contribution Manager

To access Contribution Manager, Employer Users will open the Main Menu, expand the Employer section, then the Contribution Manager subsection, and then click "Contribution Manager." The content of this page has remained unchanged from the previous user interface.

Main Menu › Employee › Contribution Manager › Contribution Manager



Importing a Contribution

To use Contribution Manager to import a payroll deposit file, Employer Users can click on the Contribution Import link under the Contribution Manager subsection of the new Employer menu. This will take you to the Payroll Deposit Import screen.

Main Menu › Employee › Contribution Manager › Contribution Import

Contribution Import

EMPLOYER / Contribution Manager
Payroll Deposit Import

Admin: HJ Test Environment Employer: Demo 123

File*: No file selected.

Start Date: 2/20/2015

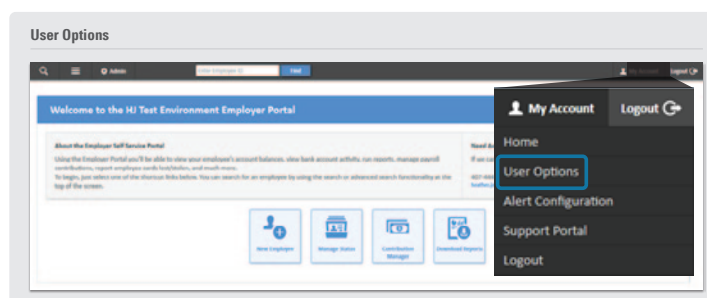
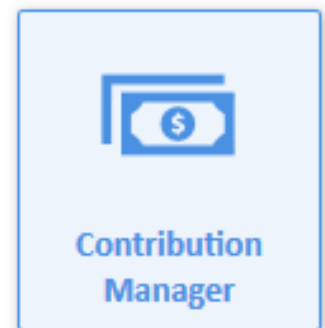
Past Imports:
 Errors Only

Line	Empr ID	Empe ID	Employee Amount
Total Approved:			\$0.00

Personalized User Navigation Tiles

Quick and easy 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-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 interface also features a count of 8 items in the available list and 7 items in the selected list.

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 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 is an 'EMPLOYER SEARCH ALL' section with a search input field labeled 'Search Employers' and a 'Find' button. Below that is an 'EMPLOYEE DEPENDENT' section with a 'SEARCH BY' dropdown menu set to 'Employee ID' and an input field labeled 'Enter Employee ID' with a 'Find' button. The search results for the employer search show 'EMPLOYER NAME' and 'EMPLOYER ID HJADEMO123'.