



Employer Portal Quick Reference Guide

Running Reports

The WealthCare Administration 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, via the main menu.

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

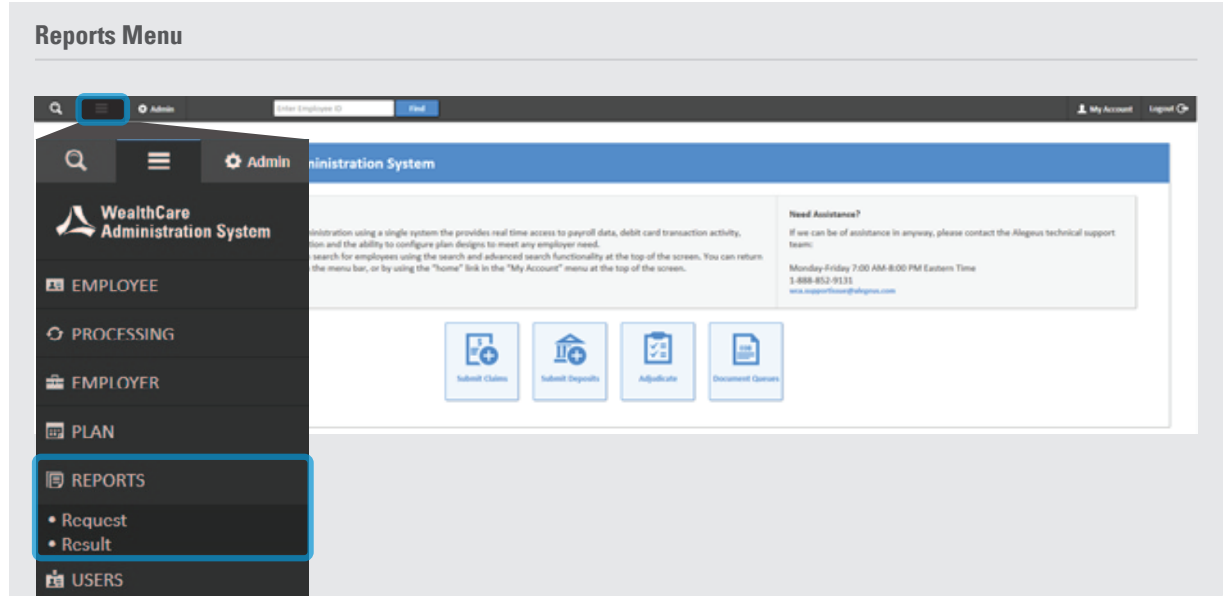
- Request a Report
- View Reports

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New Reports Menu

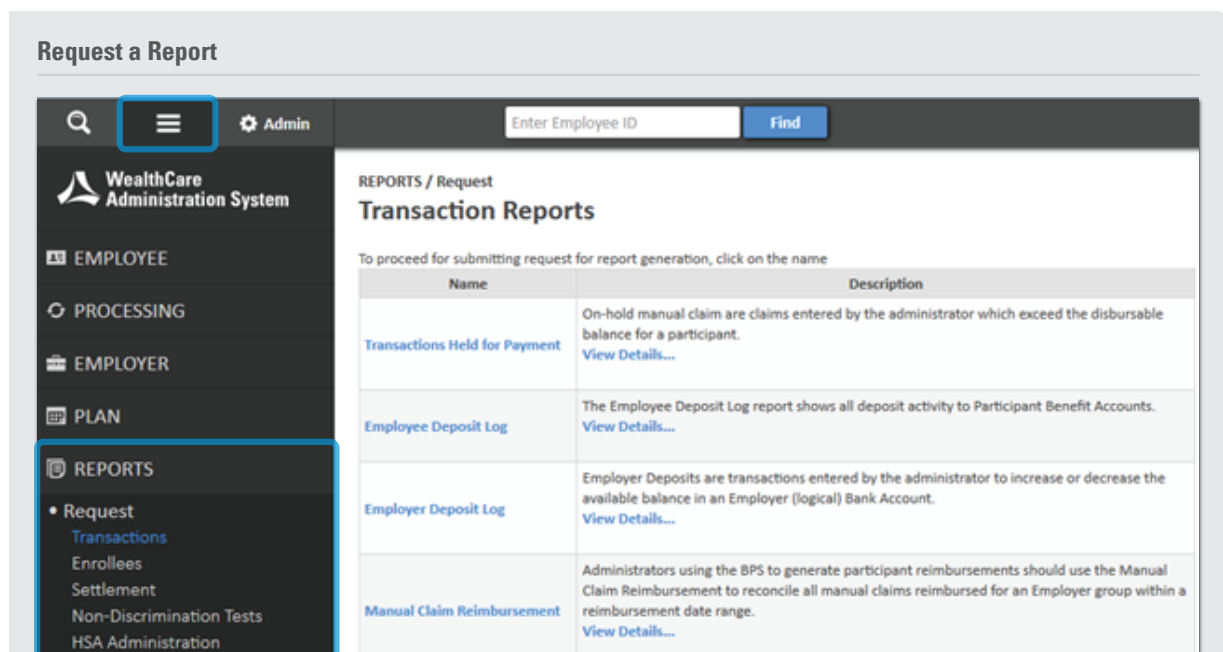
The screens that were previously accessed through the 'reports tab' in the original user interface can now be found in the 'reports section' of the Main Menu. This is where requested reports are viewed and generated.



Request a Report

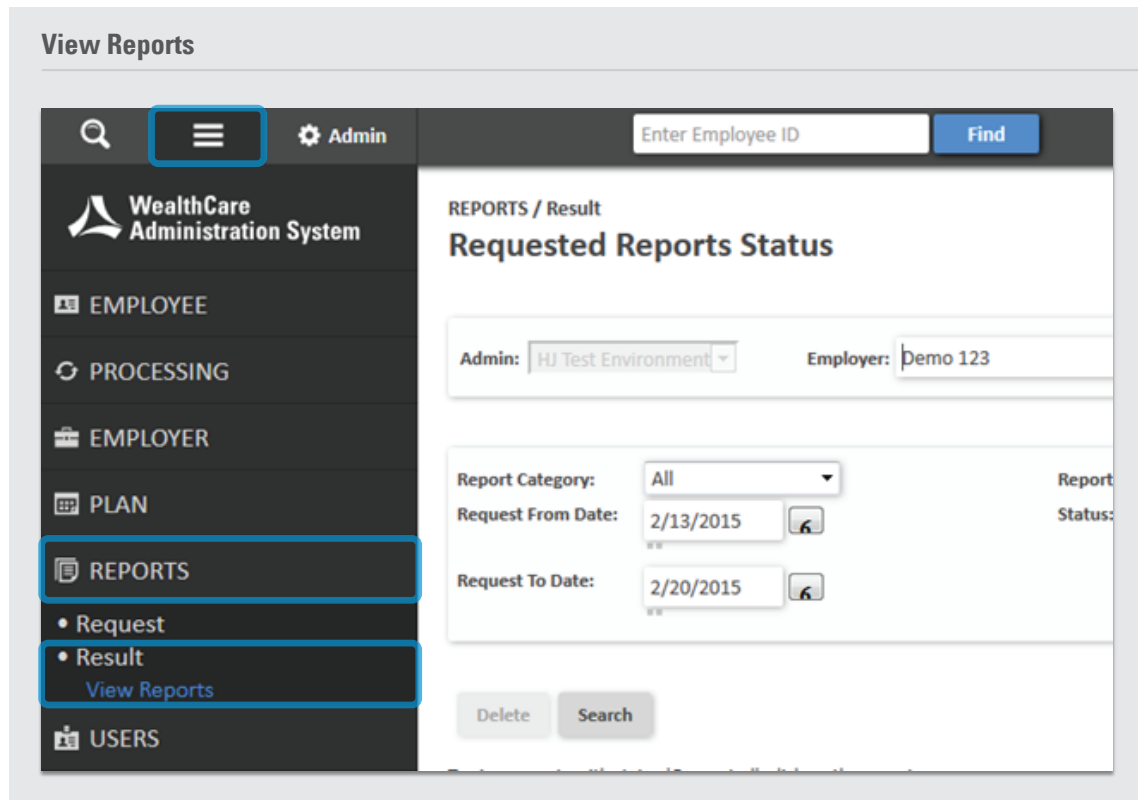
To generate a report on demand, open the main menu, expand the reports section, and then expand request subsection. Reports are grouped by type (transactions, enrollees, settlement, etc) as they were in the previous user interface. Click on the desired report type in the menu to see a list of available reports in that category.

Main Menu > Reports > Request > Desired Report Category



Once a report has been generated, employer users will need to retrieve their report in the results section of the reports menu. Click “View Reports”.

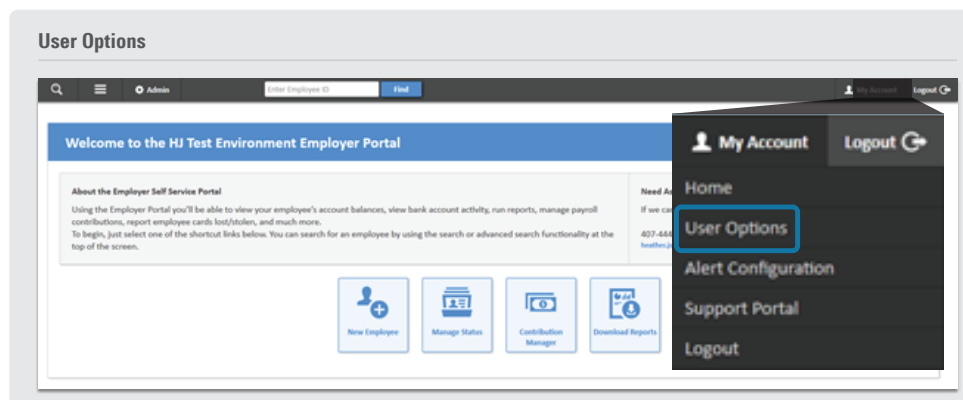
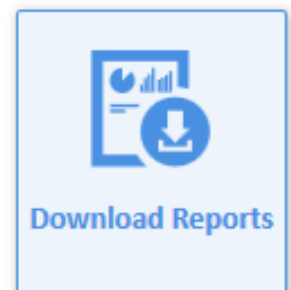
Main Menu > Reports > Result > View Reports



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'. Between these sections are two buttons: 'Add' and 'Remove'. 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. The numbers 8 and 7 are visible next to the 'Add' and 'Remove' buttons respectively, indicating the count of items in each 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 an 'Enter Empl' input field. 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, a 'Find' button, and a table with columns for 'EMPLOYER NAME' and 'EMPLOYER ID', showing a single entry with the value 'HJADEMO123'. Below the 'EMPLOYER SEARCH ALL' section is an 'EMPLOYEE DEPENDENT' section with a 'SEARCH BY' dropdown menu set to 'Employee ID', an input field for 'Enter Employee ID', and a 'Find' button.