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:

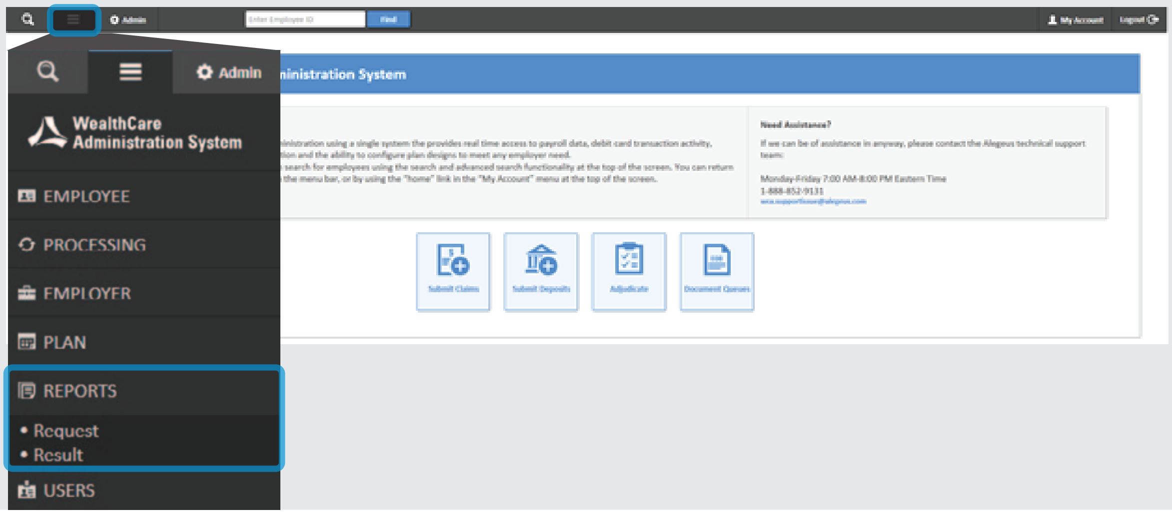
- Request a Report
- View Reports

Contents

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.

Reports Menu

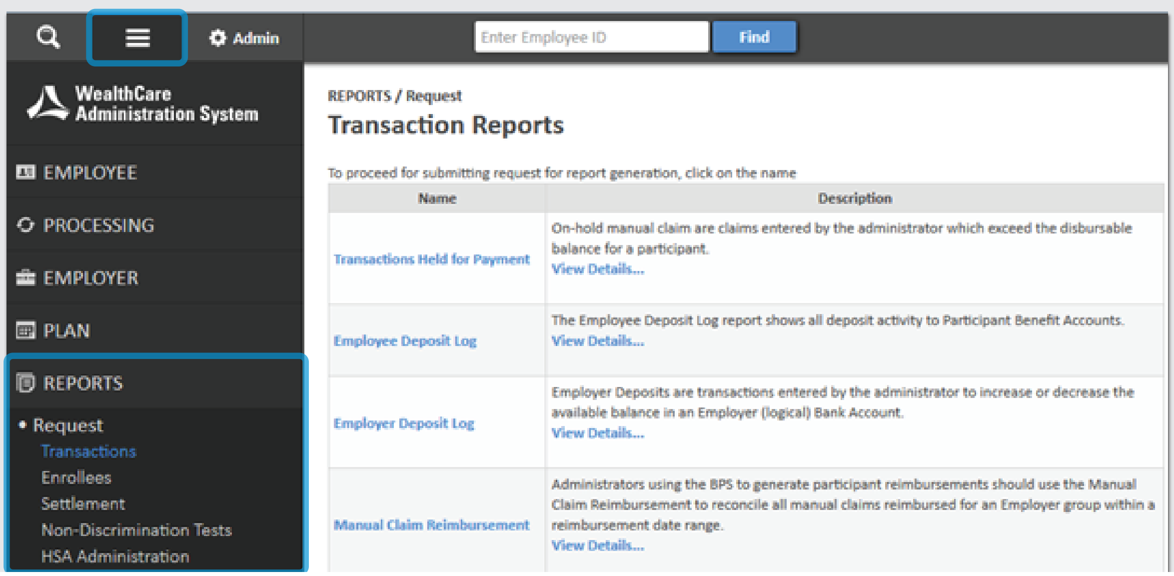


Request a Report

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

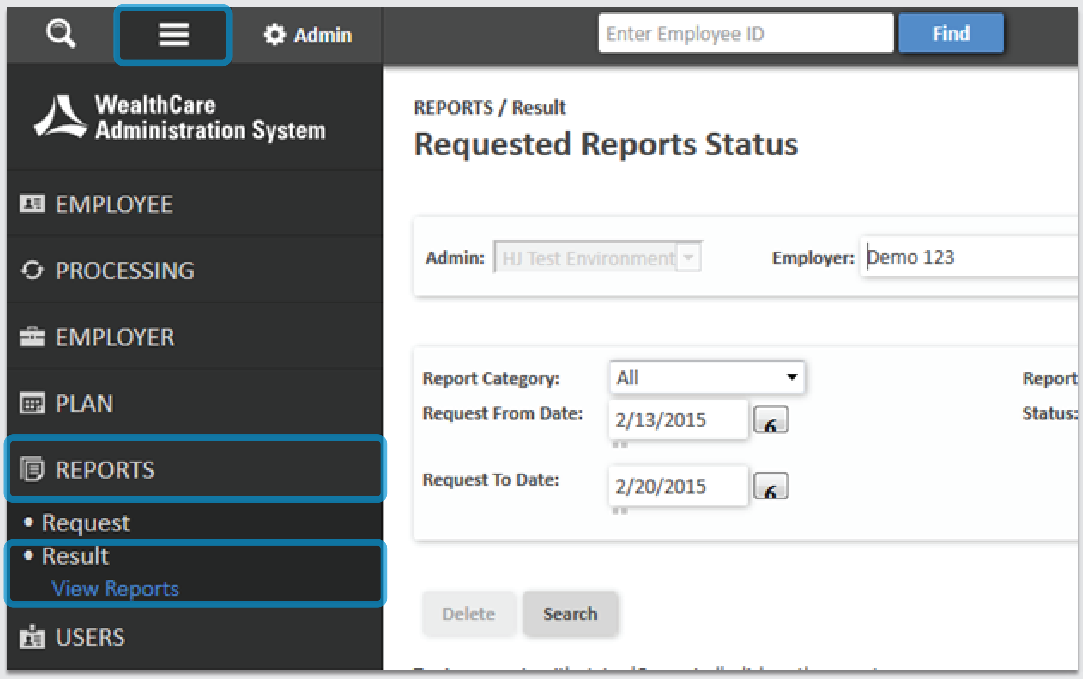
Request a Report



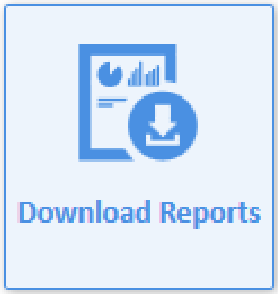
Once a report has been generated, employer users will need to retrieve their report in the results section of the reports menu. Click “View Reports”.

Main Menu ❯ Reports ❯ Result ❯ View Reports

View Reports



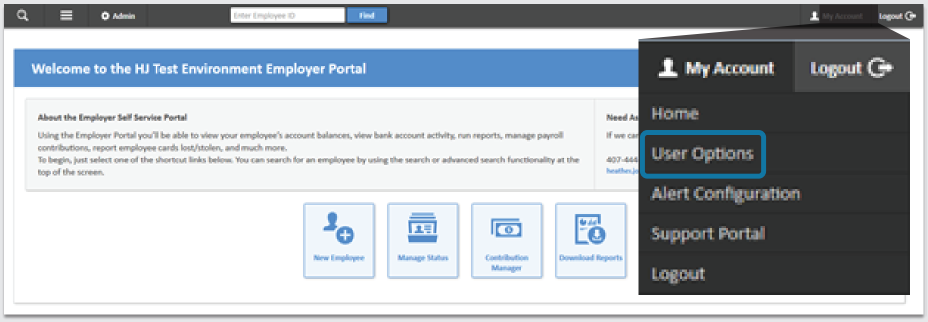
Personalized User Navigation Tiles



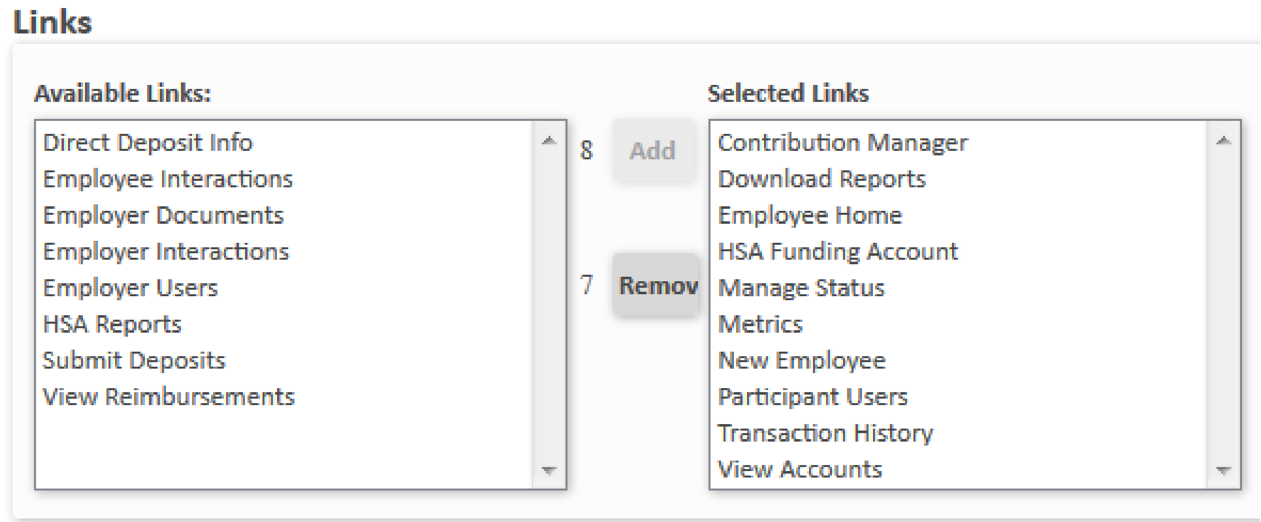
Quick and easy access to some of the pages and screens mentioned throughout this document is now easier than ever. Thanks to the new personalized user navigation tiles, users can now customize up to 10 shortcuts for easy access – from anywhere within the application. This powerful new level of customization 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:

User Options



Within this option menu, users can specify their preferred shortcuts, by toggling to add and/or remove tiles, as shown below:



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.