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

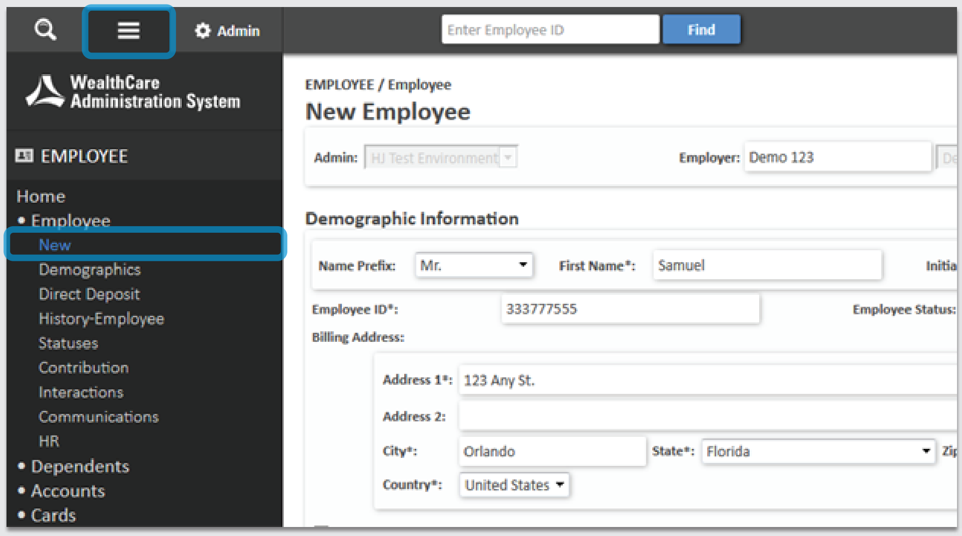
Contents

New Employee

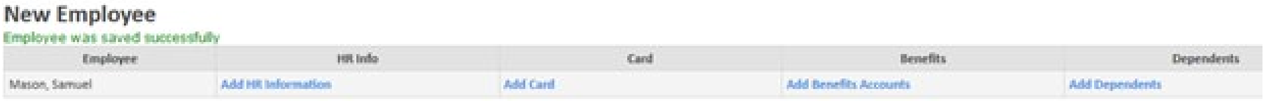
All Employee-related pages are grouped under the Employee section of the new Main Menu. To add a new employee, click the “New” link under the Employee sub-section of the Employee menu. This will take you to the New Employee page. The content of this page has not changed from the previous user interface,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

Main Menu ❭ Employee ❭ Employee ❭ New

New Employee Main Menu



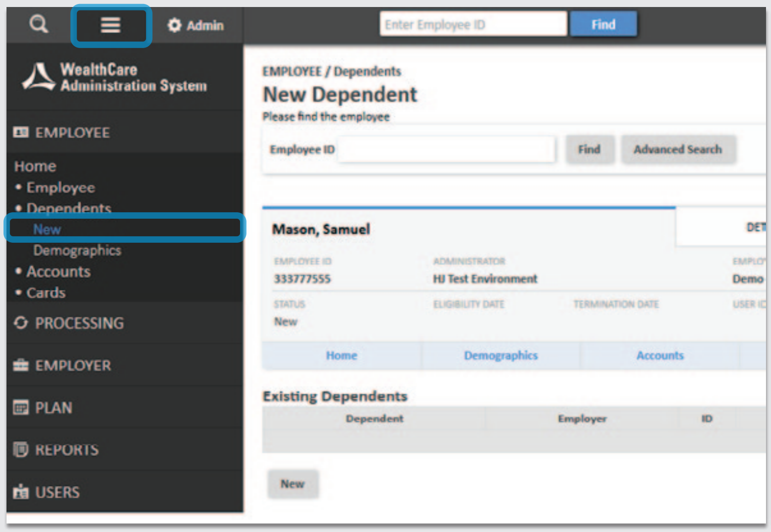
Similar to the previous user interface, once new employee data is entered and saved, you will be routed to a screen that allows you easy access to add HR information, a card, benefit accounts, and dependents.



New Dependent

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

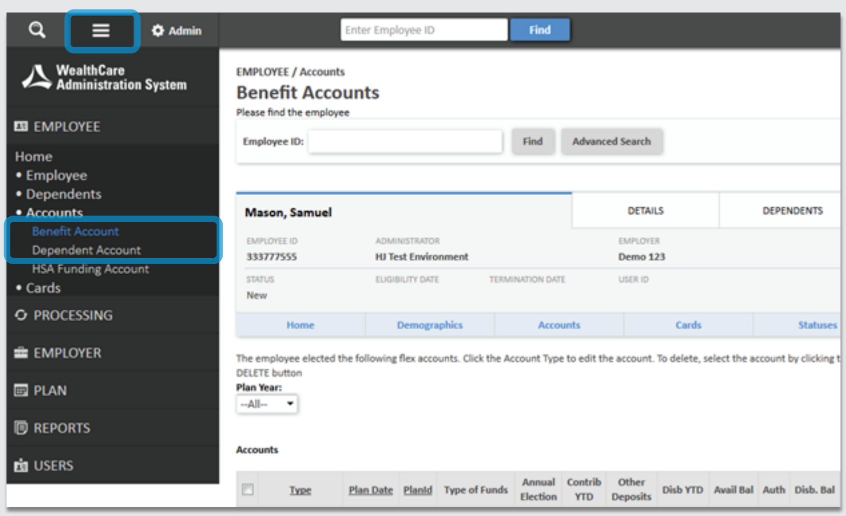
New Dependent Main Menu



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.

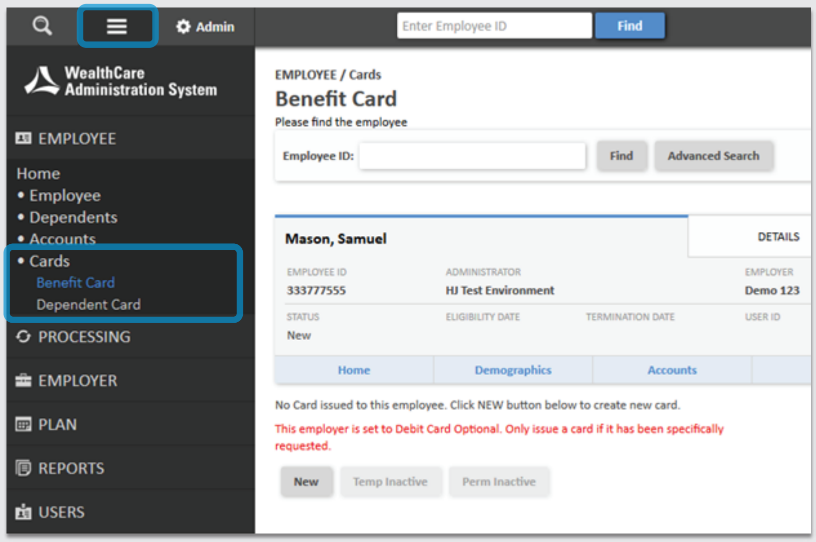
New Benefit Accounts



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.

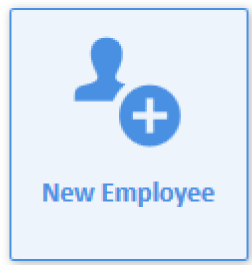
New Cards



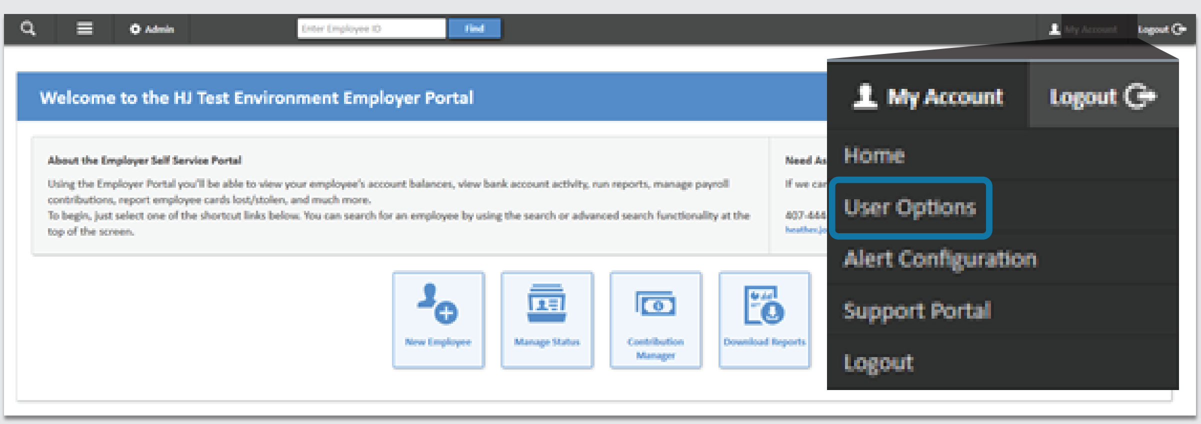
Personalized User Navigation Tiles

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.

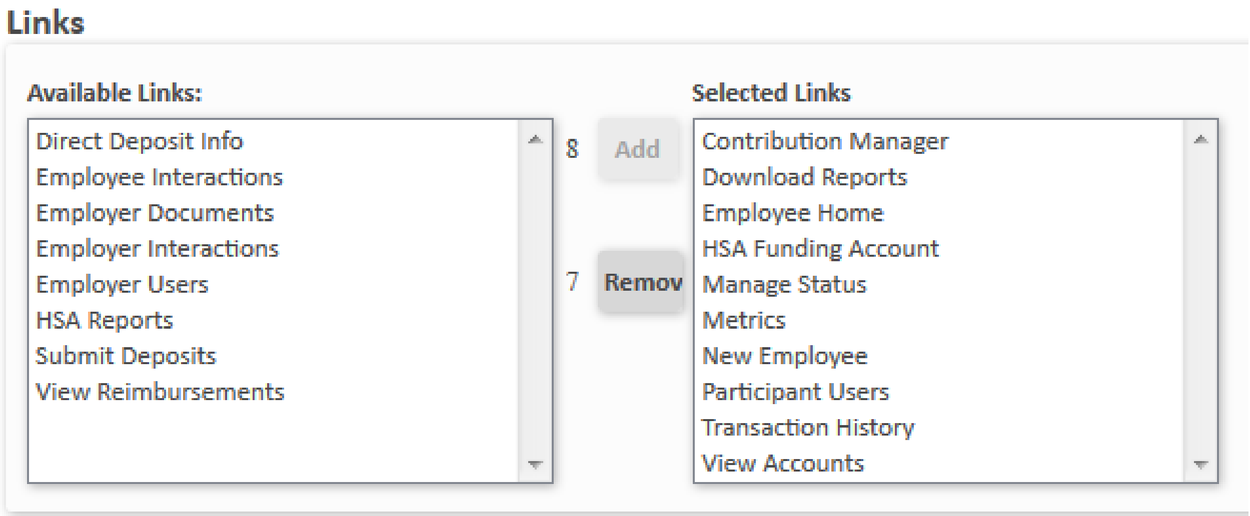
Users can select their shortcut tiles using the 'my account' menu, found under the 'user options' button, as shown below:



User Options



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



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.