WealthCare Administration System

Employer Enrollment Manager Guide

Enrollment manager is a powerful tool that provides employer users with increased management and oversight of their enrollment process. In using this functionality, you can easily populate and import census, employee demographic, dependent demographic and employee account files directly into the WealthCare Administration system, ensuring greater control over the timing and accuracy of your employees' benefit enrollment.

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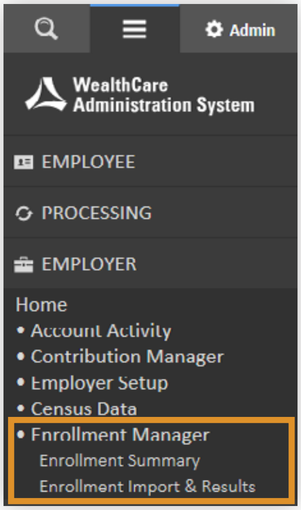
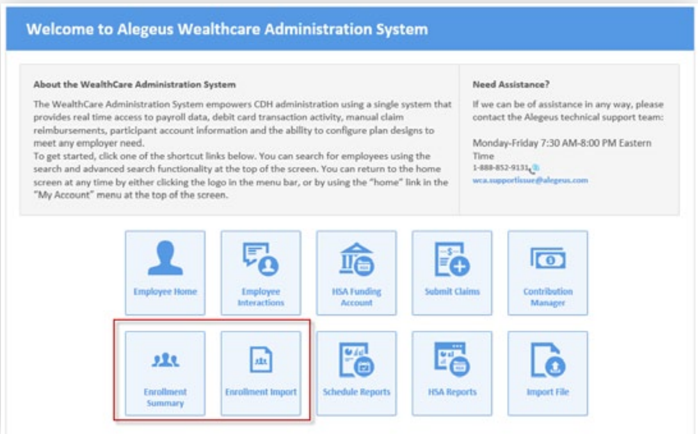
Office of Compliant Administration

Getting started

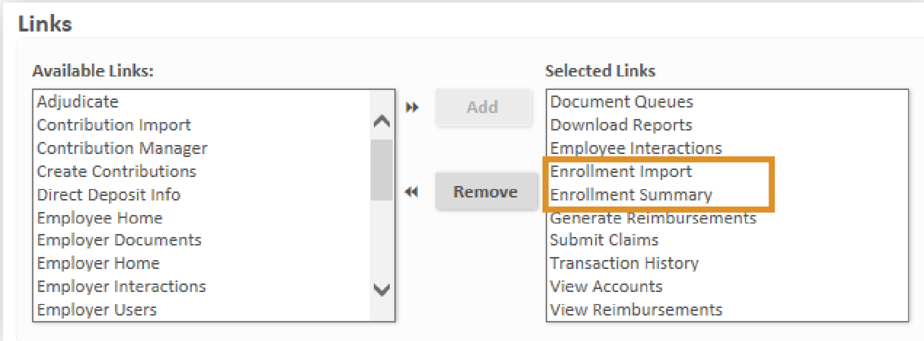
- OCA must enable enrollment manager for your user profile before you can start using this feature.
- The enrollment manager menu option is available under the employer menu with access to two new pages: enrollment summary and enrollment import & results.



Navigation tiles are available for enrollment summary and enrollment import, as shown below.



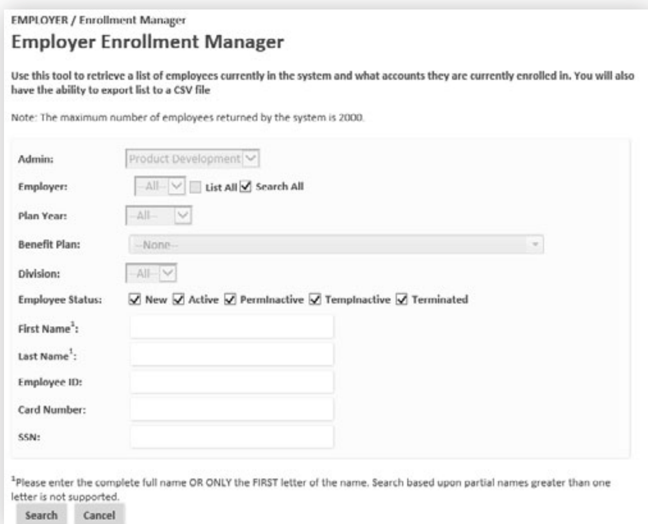
These navigation tiles can be assigned from the user options page, which can be accessed via the my account menu in the upper right corner of any page in the WealthCare Administration system.



If you do not see these options available within the WealthCare Administration system, contact OCA and request access to enrollment manager.

Enrollment summary page

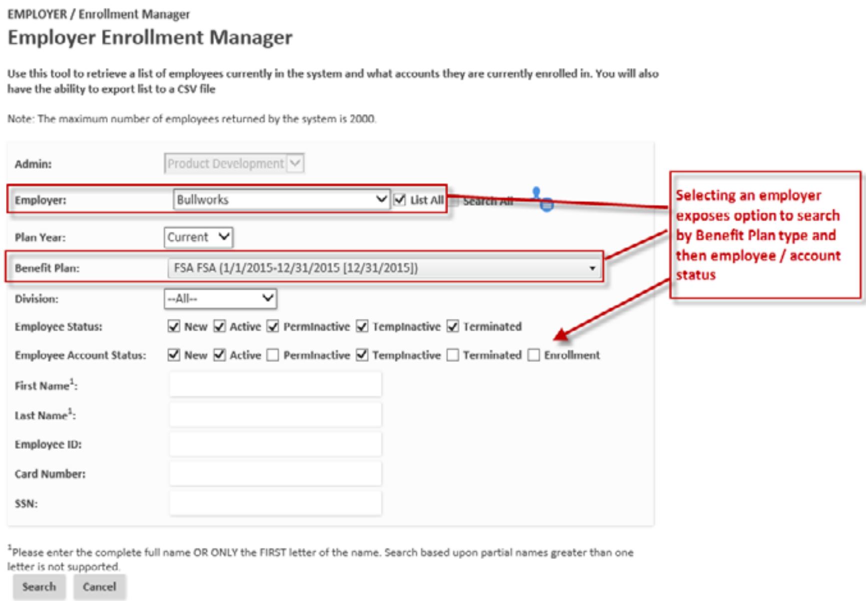
The enrollment summary page provides the ability to perform participant searches by status, employer, plan year, benefit plan, and division. The results provided can also be exported to Excel.



NOTE: If only one participant meets the search criteria, the user is brought to the employee home page for that participant

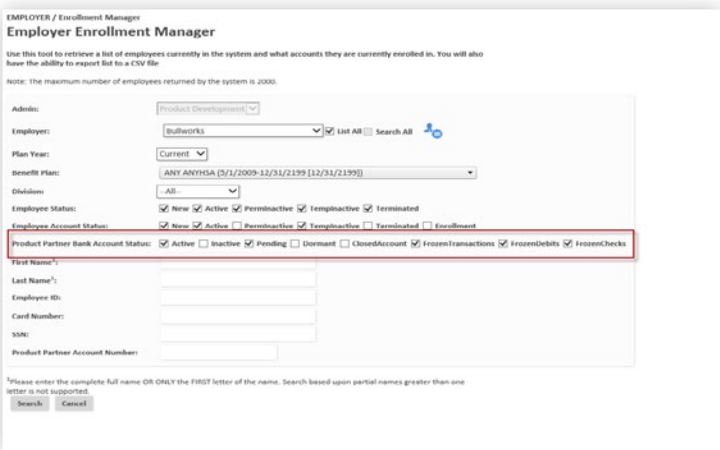
Searching by benefit plan

The tool allows you to search for participants in a specific benefit plan as well as refine your search by the status of the employee or the account. The search defaults to employees in any status and employee accounts status of new, active, or temporarily inactive.



Searching by WealthCare HSA plan

If you select a WealthCare HSA plan type in the benefit plan dropdown menu, the ability to search by the bank account status is enabled, as shown below.

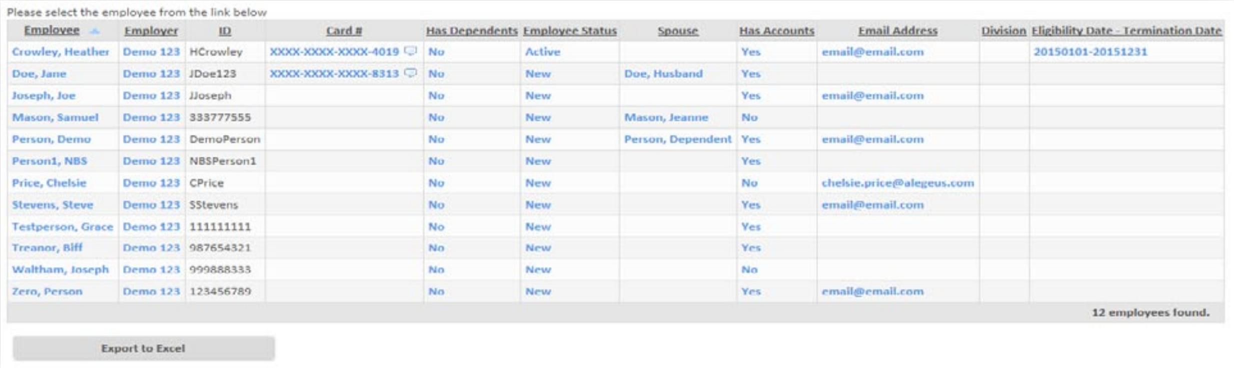


You can choose to search for one, some, or all of the following bank account statuses:

- Active – Account is open, transactions can post.
- Inactive – Account is not active, transactions are denied / non-posted.
- Pending – Account has not yet been opened, all transactions are denied/non-posted.
- Dormant – Account has been inactive for a certain time period, but activity may still be processed.
- Closed account – Account has been closed, all transactions are denied / non-posted.
- Frozen transactions – No transactions can be processed to the account.
- Frozen debits – Credits to the account can be processed, but all debits are non-posted.
- Frozen checks - Transactions other than checks can be processed, but all checks are non-posted.

Enrollment summary search results

Results of your search display in the results table below your search criteria. Employee name, employer, employee ID, card number, dependent indicator, employee status, spouse, accounts indicator, email address, division, and eligibility / termination dates populate in the table.

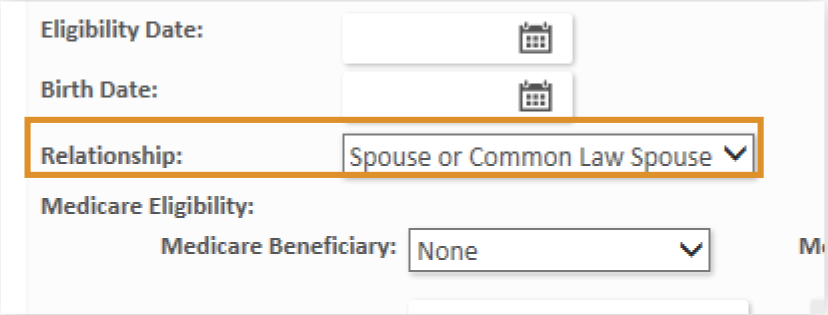

Please select the employee from the link below

Employee	Employer	ID	Card #	Has Dependents	Employee Status	Spouse	Has Accounts	Email Address	Division	Eligibility Date - Termination Date
Crowley, Heather	Demo 123	HCrowley	XXXX-XXXX-XXXX-4019	No	Active		Yes	email@email.com		20150101-20151231
Doe, Jane	Demo 123	JDoe123	XXXX-XXXX-XXXX-8313	No	New	Doe, Husband	Yes			
Joseph, Joe	Demo 123	JJoseph		No	New		Yes	email@email.com		
Mason, Samuel	Demo 123	333777555		No	New	Mason, Jeanne	No			
Person, Demo	Demo 123	DemoPerson		No	New	Person, Dependent	Yes	email@email.com		
Person1, NBS	Demo 123	NBSPerson1		No	New		Yes			
Price, Chelsie	Demo 123	CPrice		No	New		No	chelsie.price@alegeus.com		
Stevens, Steve	Demo 123	SStevens		No	New		Yes	email@email.com		
Testperson, Grace	Demo 123	111111111		No	New		Yes			
Treanor, Biff	Demo 123	987654321		No	New		Yes			
Waltham, Joseph	Demo 123	999888333		No	New		No			
Zero, Person	Demo 123	123456789		No	New		Yes	email@email.com		

12 employees found.

Export to Excel

Note that the spouse column populates only if the dependent has been flagged as a spouse in the relationship field of the dependent demographics page.



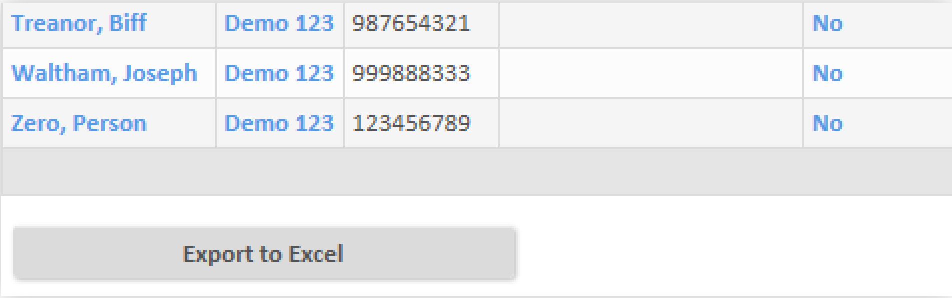
For your convenience, most fields within the results table are hyperlinked to pertinent pages within the WealthCare Administration system.

Field	Hyperlink destination
Employee	Employee demographics
Employer	Employer homepage
Card #	Edit employee card
Has dependents	Dependent demographics
Employee status	Manage statuses
Spouse	Edit dependent
Has accounts	Benefit accounts
Email address	Employee demographics
Division	Employee HR info
Eligibility date / termination date	Employee demographics

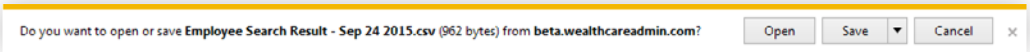
Exporting the results table to Excel

Click the export to Excel button at the bottom of your results table to open a spreadsheet containing your results. Card numbers are masked on export.

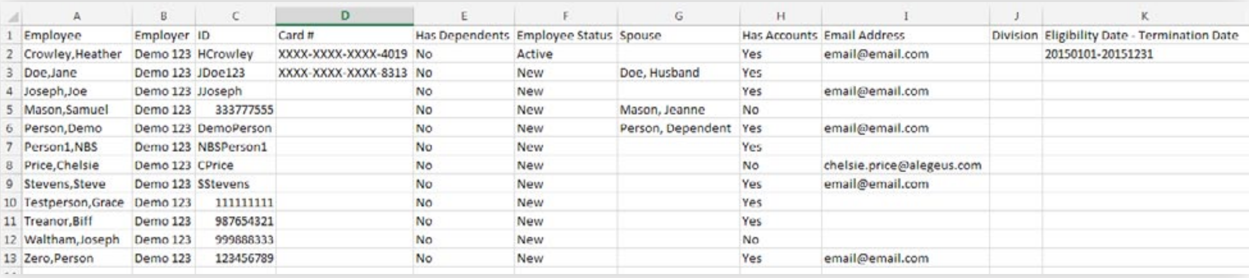
Step 1. Click the export to Excel button.



Step 2: Click open or save when prompted by your internet browser.



Step 3: The exported file opens as an Excel spreadsheet.



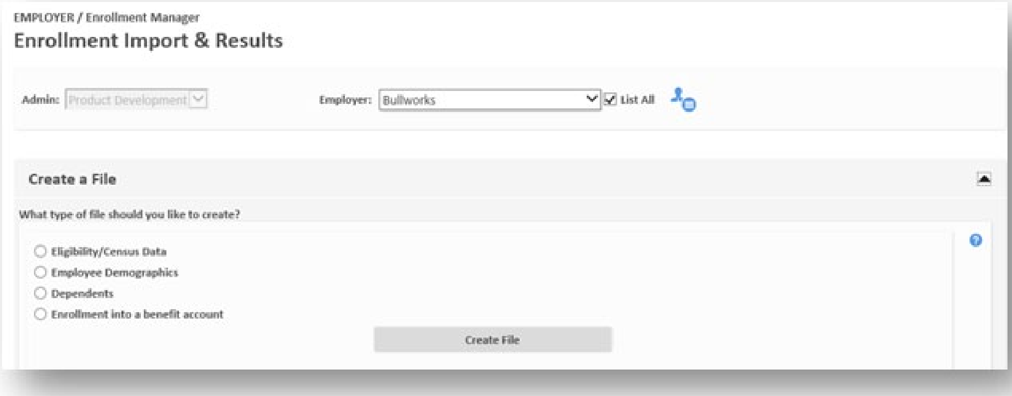
	A	B	C	D	E	F	G	H	I	J	K
1	Employee	Employer	ID	Card #	Has Dependents	Employee Status	Spouse	Has Accounts	Email Address	Division	Eligibility Date - Termination Date
2	Crowley,Heather	Demo 123	HCrowley	XXXX-XXXX-XXXX-4019	No	Active		Yes	email@email.com		20150101-20151231
3	Doe,Jane	Demo 123	JDoe123	XXXX-XXXX-XXXX-8313	No	New	Doe, Husband	Yes			
4	Joseph,Joe	Demo 123	JJoseph		No	New		Yes	email@email.com		
5	Mason,Samuel	Demo 123	333777555		No	New	Mason, Jeanne	No			
6	Person,Demo	Demo 123	DemoPerson		No	New	Person, Dependent	Yes	email@email.com		
7	Person1,NBS	Demo 123	NBSPerson1		No	New		Yes			
8	Price,Chelsie	Demo 123	CPrice		No	New		No	chelsie.price@alegeus.com		
9	Stevens,Steve	Demo 123	SStevens		No	New		Yes	email@email.com		
10	Testperson,Grace	Demo 123	111111111		No	New		Yes			
11	Treanor,Biff	Demo 123	987654321		No	New		Yes			
12	Waltham,Joseph	Demo 123	999888333		No	New		No			
13	Zero,Person	Demo 123	123456789		No	New		Yes	email@email.com		

Enrollment import & results page

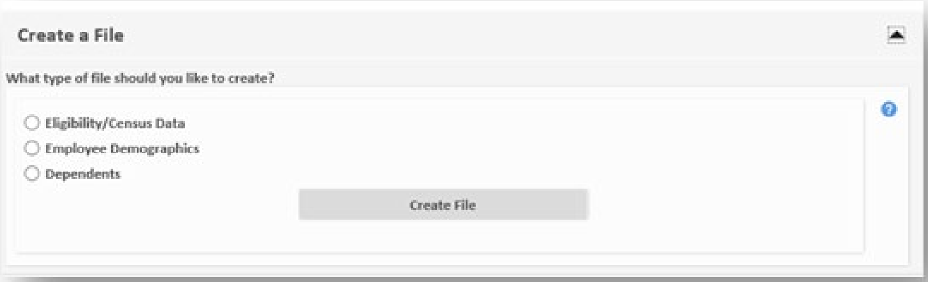
With your access to the enrollment import & results page, you have the ability to import some or all of the following records: eligibility/census data, employee demographics, dependent demographics, and enrollment into a benefit account.

NOTE: Only those records that are enabled and configured by OCA will appear in the create a file section.

> Example 1: All records are enabled on the import template enabled for employer file upload.



Example 2: All records except 'employee account' are enabled on the import template for employer file upload.

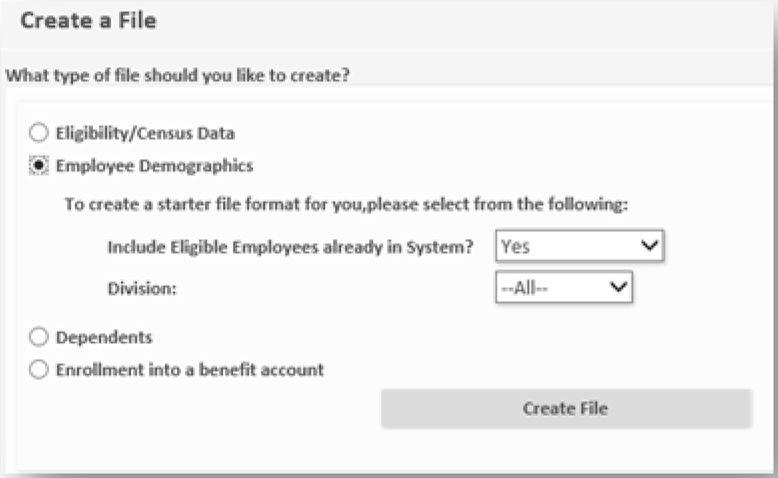


Enrollment file types available for import

- Census / eligibility – A census file is primarily used to import data for employees who are eligible to enroll in a benefit account. Used in conjunction with online enrollment in WealthCare Administration, this file type provides the ability to lock-down online enrollment only to those individuals who match a record provided on the census import.
- Employee demographics – This file imports basic information about a participant; including name, address, email, employee ID, phone number, and more.
- Dependent demographics – Similar to the employee demographics file, this file imports basic dependent information.
- Employee account - This file facilitates enrollment into a benefit account.

Creating enrollment files

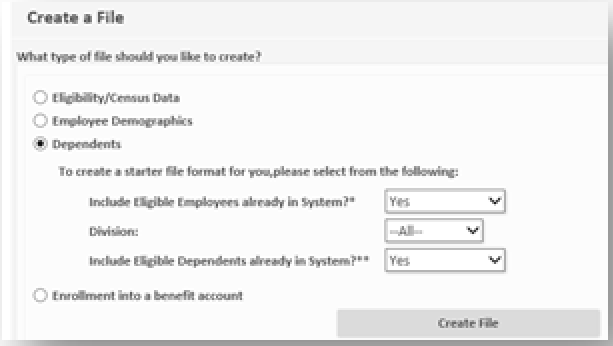
Step 1. Under the create a file section, choose the file type that you want to create.



Step 2. Some additional options are exposed. As shown above, if you are creating a census or employee demographics file, you have the option to include or exclude eligible employees already in the system, and to choose a specific division, if applicable.

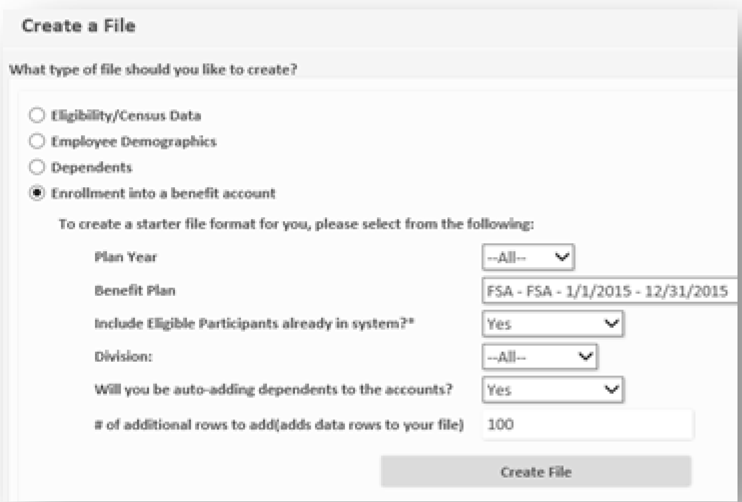
NOTE: An employee is considered eligible as long as the status is not terminated or permanently inactive and the termination date (if specified) is after today.

If you are creating a dependent demographics file, you have the same options mentioned above, with an additional option to include or exclude eligible dependents. Selecting yes includes dependents that are in the system in a new, active, or temporarily inactive status.



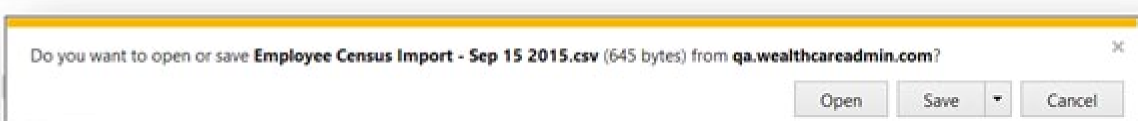
If you are creating a benefit account enrollment file, you have a number of additional options:

- Plan year – Select all, current, or previous from the drop-down.
- Benefit plan – The system defaults to the first in the list.
- Include eligible participants already in the system? Eligible employee is defined as: An employee or account is considered eligible as long as the status is not terminated or permanently inactive and the termination date (if specified) is after today.
- Division – Select a division to limit the file created to only employees in a specific division.
- Will you be auto-adding dependents to the accounts? If the employee account import template has the auto-add dependents feature, this question appears and that field is automatically populated with a 1, to auto-add dependents in the system to the account.
- # of additional rows to add (adds data rows to your file) – Use this option to add pre-filled data into the columns for fields that need to be populated, such as the account type, plan ID, plan start date, and plan end dates.



Step 3. Click create a file.

Step 4. Using Internet Explorer, a browser-based option should appear (if it does not then consult Internet Explorer online help).



Step 5. Click open or save. Be sure to save file as comma separated value (CSV) format.

Step 6. After you open the file, it may be populated with employee or dependent records based on your selections in step 2. If not, only a header is included. You can populate fields for additional records as needed.

Step 7. When you are done editing the file, be sure to save it using the CSV format.

Step 8. The header of the file matches the EDI record template you specified and also includes helpful tips for uniquely formatted fields, such as the following:

Employee ID (case sensitive)	**Birth date** (yyyymmdd)	**Employee social security number** (no dashes)

Frequently asked questions

Q: Why are there ‘ marks at the beginning of each field on the import files I create?

A: Due to Excel formatting of fields with leading zeroes and other unique data changes Excel does to CSV data, the system places an apostrophe before each field. This apostrophe ensures a social security number, employee ID, or other fields that begins with a zero do not lose the zero when manipulated offline and imported. The system automatically strips out the apostrophe when processing the records.

Q: Why don’t I see files in the create a file section of the enrollment import & results page?

A: OCA must enable each file type for upload before that file type appears. It may be that only some file types have been enabled and others have not.

Q: Why did my upload fail for the header fields do not match reason?

A: You will receive the error below if the file layout has been updated in the system since the last time you created your file. Contact the administrator responsible for the templates or you can create an up to date file format in the create a file section.