



HealthEquity | WageWorks Profile & Enrollment Instructions

HealthEquity®

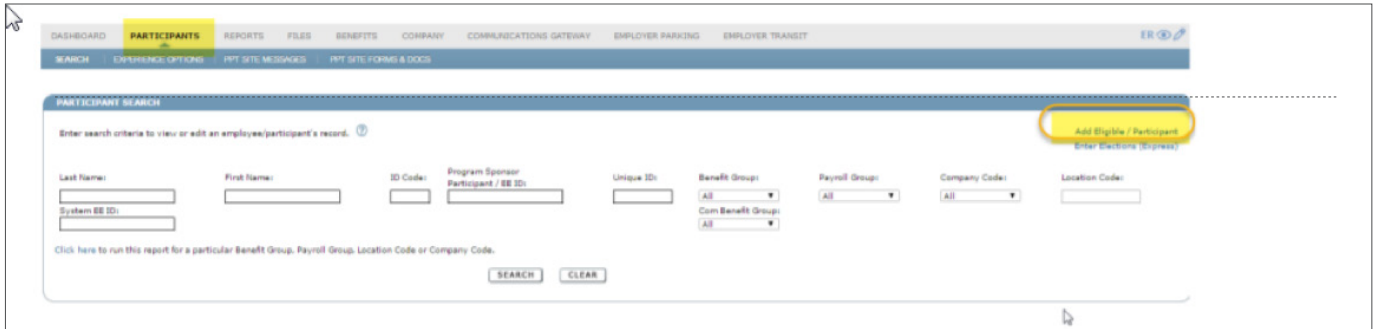
WageWorks

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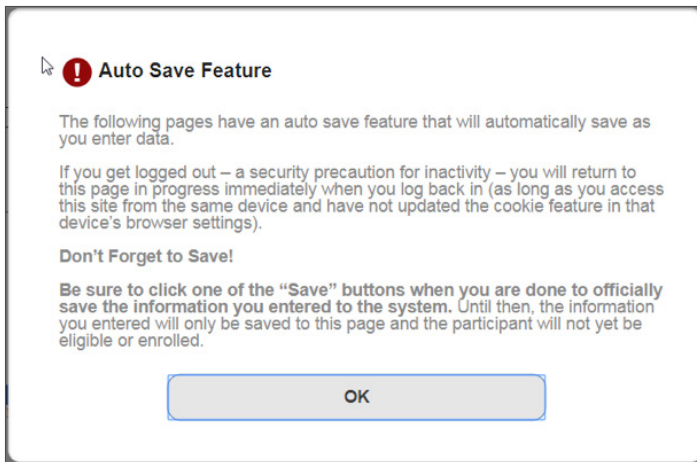
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Entering Profile Records for your Participants

- Access the Participants Tab
- Select Add Eligible/Participant in the top right corner.



You will be advised of the Auto Save feature. Click OK to acknowledge the notification.



This site uses an Auto Save feature. As long as you are using the same computer and have not made any updates to your cookie settings, you will be returned to the page you last accessed if your session logged out due to inactivity.

The following are the items included in the employee profile.

Required profile elements are marked with an asterisk (*).

- Participant or Employee ID: This is an employer-defined value used to identify your employee. For security reasons, this field should not contain the employee's full social security number. If the value for this field is at least 9 numeric digits, it can also be used in the Unique ID field.
- *Unique ID or SSN: This is a unique, 9 to 11 digit value that the program uses to identify your employees. It is common for employers to use numbers such as the employee ID, social security number or combination of the two.
 - In order for an employee to register to use the program, whether by enrolling on the participant site or calling in to customer service, the employee must know the last four (4) digits of this number.
 - For security reasons, this value is not displayed on the Employer Site¹³ or in the online reports.
- *Last Name
- *First Name
- Middle Initial
- *Birth Date
- Gender
- *Mailing Address 1 – Participants can change this value once they create a user profile
- Mailing Address 2 – Participants can change this value once they create a user profile
- *City – Participants can change this value once they create a user profile
- *State – Participants can change this value once they create a user profile
- *Zip – Participants can change this value once they create a user profile
- Work Address 1 & 2
- Work City, State & Zip
- *Email address – Participants can change this value once they create a user profile
- Phone
- *Employment Hire Date
- Employment Termination Date
- HSA Separation Date (does not apply to this program)
- *Benefit Group Code – Typically the Code implemented with your program is displayed and selected as the default. Unless otherwise instructed, you should not need to select another value.
- *Benefit Group Effective Date – This date is usually the hire date.
- *Payroll Group Code – Typically the Code implemented with your program is displayed and selected as the default. Unless otherwise instructed, you should not need to select another value.
- *Payroll Group Effective Date – This date is usually the hire date..
- Location Code – An optional field to identify an employee's geographic location as defined by the employer.
- Company Code – An optional field to identify an employee's company or division as defined by the employer.
- *Commuter Benefit Group Code – Commuter Benefit Group Code will be only "Y" or "N". The default selection is "Y" to become commuter eligible.

The screenshot shows a web form for creating an employee profile. The fields are organized into sections:

- Identification:** Participant or Employee ID, Unique ID or SSN (*).
- Name:** Last Name (*), First Name (*), Middle Initial.
- Birth Information:** Birth Date (*), Month, Day, Year, Gender (radio buttons for Unknown, Male, Female).
- Mailing Address:** Mailing Address 1 (*), Mailing Address 2, City (*), State (*), Zip Code (*).
- Work Address:** Work Address 1, Work Address 2, Work City, Work State, Work Zip Code.
- Contact:** Participant Updates Address (checkbox), Email 1, Phone (Area, Prefix, Line, Ext. (Optional)).
- Employment Dates:** Employment Hire Date (*), Employment Termination Date.
- Benefit and Payroll:** Benefit Group Code (*, default ACTIVE), Benefit Group Effective Date (*), Payroll Group Code (*, default NONE), Payroll Group Effective Date (*).
- Optional Fields:** Location Code, Company Code, Commuter Benefit Group Code (*, default Y).

At the bottom right of the form are two buttons: "NEXT" and "CANCEL".

Entering Enrollments for your participants (FSA):

- Log in to the HealthEquity | WageWorks Employer Site, then select the Participants tab

The screenshot shows the top navigation bar with 'PARTICIPANTS' highlighted. Below it, there are tabs for 'DASHBOARD', 'PARTICIPANTS', 'REPORTS', 'FILES', 'BENEFITS', 'COMPANY', and 'COMMUNICATIONS GATEWAY'. A search bar contains 'DemoWorks (21180)'.

- This will bring you to the Participant Search page (**you should have already entered the profile records)

The screenshot shows the 'PARTICIPANT SEARCH' page with a search criteria form. The 'Last Name' field is highlighted with a red box. Other fields include 'First Name', 'ID Code', and 'Program Sponsor Participant / EE ID'.

- In the last name field, enter the first few letters of a participant's last name, then select Search
- When the participant's name comes up at the bottom of the page, select the last name
- This will bring you to the participant's Profile Page

The screenshot shows the 'Profile' page for Andrew Anderson (42597445). It is divided into three sections: 'PERSONAL', 'ELIGIBILITY', and 'PROFILE'. The 'PERSONAL' section includes last name, first name, initial, birth date, and ID code. The 'ELIGIBILITY' section includes benefit group, payroll group, location code, company code, and hire date. The 'PROFILE' section includes program mail, email, phone, work ZIP, and direct deposit account.

- From here you will select Healthcare & Dependent Care on the toolbar
- This will bring you to the Account History page, where you will select Add Enrollment on the right-hand side of the page

The screenshot shows the 'ACCOUNT HISTORY' page for Andrew Anderson. It has a toolbar with 'BACK' and 'Add Enrollment' buttons. The 'Add Enrollment' button is highlighted with a red box.

- This will bring you to the Enter Enrollment Info page, where you will enter the Coverage Effective Date (first day of plan year) in the corresponding field and the Date Enrollment Form Signed in the corresponding field. Please note if you do not have the date the form was signed, enter the date you are entering the enrollment. Then select Search.

The screenshot shows the 'ENTER ENROLLMENT INFO' page. It has two main sections: 'PROFILE' and 'ENROLL IN HC & DC PLAN'. The 'PROFILE' section shows participant details. The 'ENROLL IN HC & DC PLAN' section has fields for 'Coverage Effective Date' and 'Date Enrollment Form Signed', both with calendar pickers. A 'SEARCH' button is at the bottom.

- Now you will be presented with the field to enter the HCFSA and DCFSA annual election amount. Enter the annual election amount in the corresponding field. Scroll down and select Next at the bottom of the page.
- You will now be presented with the information you entered for review, if all is correct, scroll down and select Save Enrollment at the bottom of the page.
- The FSA enrollment is now complete. To enter the next enrollment, select Participants tab in the toolbar.

This screenshot is similar to the previous one but shows the 'Health Care FSA 2021' section with an 'Election Amount' field highlighted by a red box. The 'SEARCH' button is also visible.

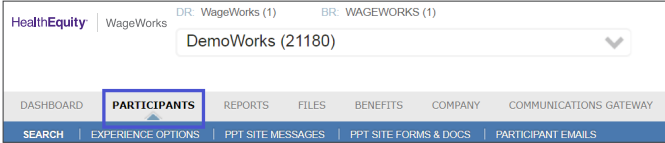
Entering Enrollments for your participants (FSA):

We recommend that once you have entered all of the enrollments that you run an Enrollment Report to ensure that you have entered all of your participants. Below are the step-by-step instructions to do so:

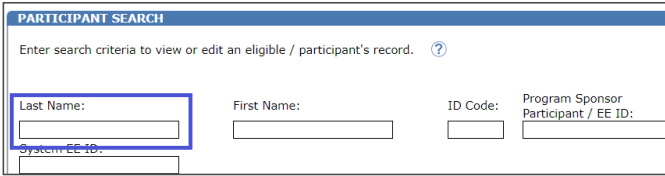
- From the Health | WageWorks Employer Site, select the Reports tab in the toolbar
- Once there select HC & DC in the blue toolbar
- Then you will be presented with a list of available reports. Select Enrollment
- For the purposes of verifying, the enrollments do not change the As of Date field. Leave all fields as they are at this time. Scroll down and select Generate Report. You will be presented with a Generate Report Options box, just select OK at the bottom
- Now select Pick Up in the toolbar on the left-hand side
- You will see the report here and select it. The report will remain here for 96 hours. After that time, it will be deleted.
- Once you select the report it will be presented to you in an Excel spreadsheet
- You can save the spreadsheet to your own computer, you can also reformat, as you would like.
- Scroll down and you will see your participants that you have enrolled. You will need to scroll across to see all of the information that has been entered. All of our reports are quite wide, so be sure to scroll across to access all of the information.

Entering Enrollments for your participants (HRA):

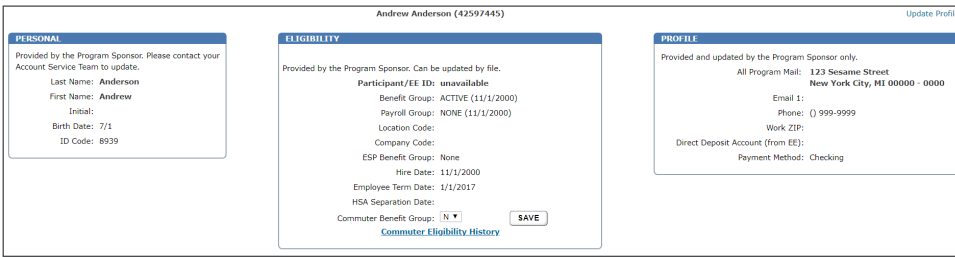
- Log in to the HealthEquity | WageWorks Employer Site, then select the Participants tab



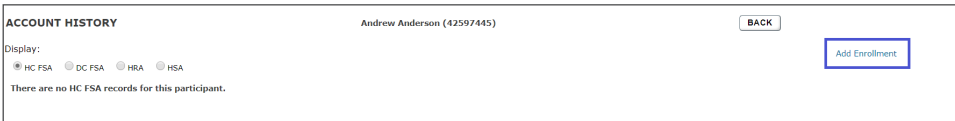
- This will bring you to the Participant Search page (**you should have already entered the profile records)



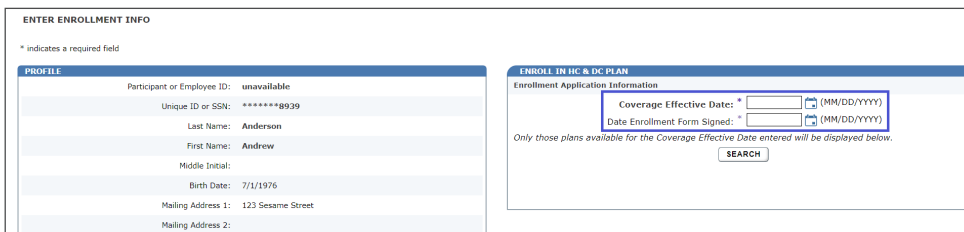
- In the last name field, enter the first few letters of a participant's last name, then select Search
- When the participant's name comes up at the bottom of the page, select the last name
- This will bring you to the participant's Profile Page



- From here you will select Healthcare & Dependent Care on the toolbar
- This will bring you to the Account History page, where you will select Add Enrollment on the right-hand side of the page



- This will bring you to the Enter Enrollment Info page, where you will enter the Coverage Effective Date (first day of plan year) in the corresponding field and the Date Enrollment Form Signed in the corresponding field. Please note if you do not have the date the form was signed, enter the date you are entering the enrollment. Then select Search.



Entering Enrollments for your participants (HRA):

- Now you will be presented with the field to enter the HRA Plan Year Election Amount and the Coverage Tier. Enter the annual election amount in the field, then select the Coverage Tier by selecting the drop down. Scroll down and select Next at the bottom of the page.
- Now you will be presented with the information you have entered for review, if all is correct, scroll down and select Save Enrollment at the bottom of the page.
- If you have selected a coverage tier of more than single, then you will now be prompt to enter the explicitly named dependents who are eligible under the HRA plan.
- You will now be presented with the Add Dependent page. Here you will populate the fields only with an asterisk * (first name, last name, relationship, date of birth, coverage start date). Once you have populated these fields, then select Save at the bottom of the page. If you have additional dependents to enter you will select Add Dependent in the upper right-hand corner of the Explicitly Named Dependent box.
- The HRA and FSA enrollments are now complete. To enter the next enrollment select the Participant tab in the toolbar.

The screenshot shows a web form titled "ADD DEPENDENT". The form is enclosed in a blue-bordered box. It contains the following fields from top to bottom: "First Name:" with a text input field; "Last Name:" with a text input field; "Unique ID:" with a text input field; "Relationship:" with a dropdown menu; "Date Of Birth:" with a text input field and a mask "(MM/DD/YYYY)"; "Student Status:" with a dropdown menu; "Coverage Start Date:" with a text input field and a mask "(MM/DD/YYYY)"; and "Coverage End Date:" with a text input field and a mask "(MM/DD/YYYY)". At the bottom of the form are two buttons: "SAVE" and "CANCEL".

We recommend that once you have entered all of the enrollments that you run an Enrollment Report to ensure that you have entered all of your participants. Below are the step-by-step instructions to do so:

- From the HealthEquity | WageWorks Employer Site, select the Reports tab in the toolbar
- Once there select HC & DC in the blue toolbar
- Then you will be presented with a list of available reports. Select Enrollment
- For the purposes of verifying, the enrollments do not change the As of Date field. Leave all fields as they are at this time. Scroll down and select Generate Report. You will be presented with a Generate Report Options box, just select OK at the bottom
- Now select Pick Up in the toolbar on the left-hand side
- You will see the report here and select it. The report will remain here for 96 hours. After that time, it will be deleted.
- Once you select the report it will be presented to you in an Excel spreadsheet
- You can save the spreadsheet to your own computer, you can also reformat, as you would like.
- Scroll down and you will see your participants that you have enrolled. You will need to scroll across to see all of the information that has been entered. All of our reports are quite wide, so be sure to scroll across to access all of the information.

Entering Enrollments for your participants (HRA & FSA):

- Log in to the HealthEquity | WageWorks Employer Site, then select the Participants tab

- This will bring you to the Participant Search page (**you should have already entered the profile records)

- In the last name field, enter the first few letters of a participant's last name, then select Search
- When the participant's name comes up at the bottom of the page, select the last name
- This will bring you to the participant's Profile Page

- From here you will select Healthcare & Dependent Care on the toolbar
- This will bring you to the Account History page, where you will select Add Enrollment on the right-hand side of the page

- This will bring you to the Enter Enrollment Info page, where you will enter the Coverage Effective Date (first day of plan year) in the corresponding field and the Date Enrollment Form Signed in the corresponding field. Please note if you do not have the date the form was signed, enter the date you are entering the enrollment. Then select Search.

Entering Enrollments for your participants (HRA & FSA):

- Now you will be presented with the field to enter the HRA Plan Year Election Amount and the Coverage Tier in addition to the HCFSA and DC FSA benefits. Enter the annual election amount in the field, then select the Coverage Tier by selecting the drop down. Scroll down and select Next at the bottom of the page.
- Now you will be presented with the information you have entered for review, if all is correct, scroll down and select Save Enrollment at the bottom of the page.
- If you have selected a coverage tier of more than single, then you will now be prompt to enter the explicitly named dependents who are eligible under the HRA plan
- You will now be presented with the Add Dependent page. Here you will populate the fields only with an asterisk * (first name, last name, relationship, date of birth, coverage start date). Once you have populated these fields, then select on Save at the bottom of the page. If you have additional dependents to enter you will select Add Dependent in the upper right-hand corner of the Explicitly Named Dependent box.
- The HRA and FSA enrollments are now complete. To enter the next enrollment select the Participant tab in the toolbar.

The screenshot shows a form titled "ADD DEPENDENT" with the following fields and controls:

- First Name: *
- Last Name: *
- Unique ID:
- Relationship: *
- Date Of Birth: *
- Student Status:
- Coverage Start Date: *
- Coverage End Date:

At the bottom of the form are two buttons: **SAVE** and **CANCEL**.

We recommend that once you have entered all of the enrollments that you run an Enrollment Report to ensure that you have entered all of your participants. Below are the step-by-step instructions to do so:

- From the HealthEquity | WageWorks Employer Site, select the Reports tab in the toolbar
- Once there select HC & DC in the blue toolbar
- Then you will be presented with a list of available reports. Select Enrollment
- For the purposes of verifying, the enrollments do not change the As of Date field. Leave all fields as they are at this time. Scroll down and select Generate Report. You will be presented with a Generate Report Options box, just select OK at the bottom
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