



HealthEquity®

Client Portal User Guide

COBRA & Direct Bill Services

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SECTION 1 – INTRODUCTION & LOG IN

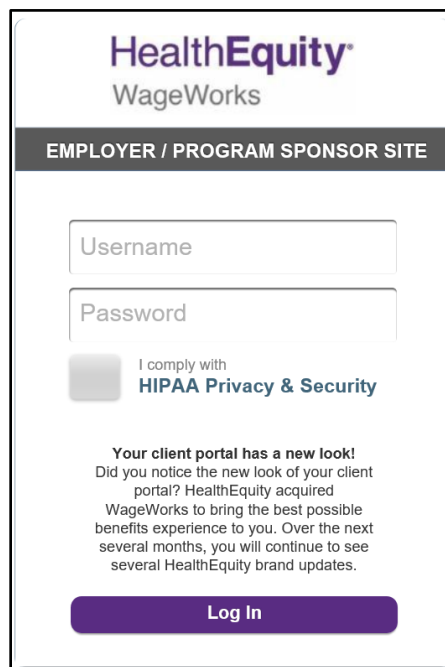
Introduction

This document details all of the functionality and data included in the Employer/Plan Sponsor portal. As the Employer/Plan Sponsor it is critical that you review this information and audit the data included in the website on a regular basis. Much of this website is self-service and it contains everything needed to manage your COBRA and/or Direct Bill administration.

Login Information

HealthEquity/WageWorks will provide the authorized client contacts with a username and password to access their company's records through the website. Once you have received your username and password, you can log in to the website.

To access our client website, go to cobrabenefits.wageworks.com and select the **Employer Log In** button.

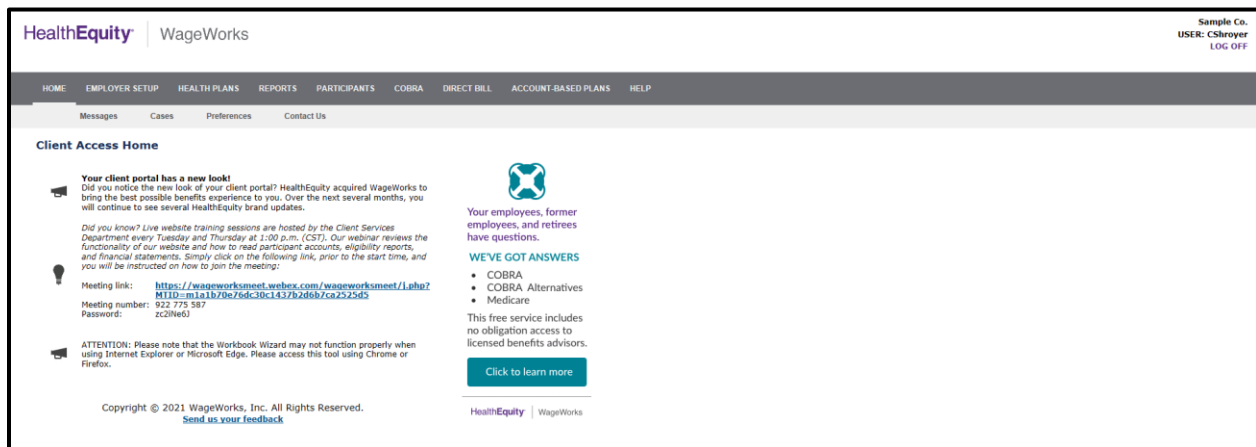


The screenshot shows the login interface for the HealthEquity WageWorks Employer/Program Sponsor Site. At the top, the HealthEquity logo and WageWorks brand name are displayed. Below this is a dark grey header bar with the text "EMPLOYER / PROGRAM SPONSOR SITE". The main content area contains two input fields: "Username" and "Password". Below the password field is a checkbox labeled "I comply with HIPAA Privacy & Security". A message block follows, stating: "Your client portal has a new look! Did you notice the new look of your client portal? HealthEquity acquired WageWorks to bring the best possible benefits experience to you. Over the next several months, you will continue to see several HealthEquity brand updates." At the bottom of the form is a purple "Log In" button.

For help with username and/or password problems, or other technical issues, please contact your Service Delivery Management team.

SECTION 2 – CLIENT ACCESS HOME PAGE

Once you log in to your account, you'll see the Client Access Home page. This home page is where you will find general contact information, regulatory changes, and system enhancements. Take a moment to read any messages that identify new information.



From the home page, you will have easy access to the following options:

Primary Menu Options

- **Employer Setup** – View the information or settings for your account
- **Health Plans** – View your carriers, health plans and rate structures.
- **Reports** – View the standard reports that are available through this website.
- **Help** – View a number of resources including our contact information, a list of frequently asked questions and resources.
- **Log Off** – Allows you to log out of your account.
- **Participants** – View and access participant listings or records, update information and add employees.
- **COBRA** – Notify HealthEquity of your new COBRA participants, including entering qualifying events and/or takeover participants.
- **Direct Bill** – Notify HealthEquity of your new Direct Bill participants, or access Direct Bill reports. Note, this option will only show if HealthEquity is assisting with the administration of your Direct Bill services.

Secondary Menu Options (Gray Tabs)

- **Messages** – Read updates and other important communications from us.
- **Cases** – Create cases and follow their progress through to resolution.
- **Preferences** – Receive daily reports of open cases or change your password.
- **Contact Us** – See our address, contact numbers, and links to various email addresses and an online request form.

SECTION 3 – EMPLOYER SETUP

The Employer Setup page allows the user to view client information.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL ACCOUNT-BASED PLANS HELP

General Services Contacts Divisions Classes Security Summary

Employer Setup

Welcome to our Plan Sponsor configuration page. In this section, you can view and configure settings for your account.

General: Provides plan sponsor information which in addition to Name, Tax I.D.Number, and Address, also includes eligible employee count, number of continuants, and historical turnover rate. This section allows you to update your profile.

Services: Provides a summary list of services being provided by WageWorks. If this list does not match your understanding of which services WageWorks should be providing, please notify us immediately.

Contacts: WageWorks maintains a contact list for all key contacts associated with the relationship, including Executive, Administrative, Billing, and Carrier contacts. Please update this list as needed so that we can stay in touch with you.

Divisions: A list of plan sponsor selected divisions used for grouping of employees and continuants. This section will be completed automatically if you are interfacing with WageWorks using our file transfer interface.

Classes: View your existing employee classes currently existing in the WageWorks system.

Security: A list of users with access to your records. Administrative users can view and update this list. Administrators should visit this screen periodically to verify that only authorized users have access to your records.

Summary: A configuration summary allows a one-page view of all plan sponsor settings for employer and health plan information. We encourage you to print and save a copy of this page for your records after your settings have changed.

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There are seven different sections within Employer Setup. The sections are as follows:

- **General** – Plan sponsor information, employee count, number of continuants and historical turnover rate.
- **Services** – A summary list of services being provided by HealthEquity/WageWorks. If this list does not match the employer's understanding of the services HealthEquity should be providing, please notify us immediately.
- **Contacts** – HealthEquity/WageWorks maintains a contact list for all key contacts associated with the relationship including executive, administrative, billing and carrier contacts.
- **Divisions** – Displays the different divisions within the employer's company.
- **Classes** – Existing employee classes currently in our system.
- **Security** – A list of users with access to the records. Administrative users can view this list. Administrators should visit this webpage periodically to verify that only authorized users have access to the records.
- **Summary** – A summary of all plan sponsor settings for employer and health plan information.

General

Allows you the ability to view and update general plan sponsor information that we have on file.

The screenshot shows the 'Plan Sponsor Information' form in the HealthEquity WageWorks portal. The form includes a navigation menu with options like HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, ACCOUNT-BASED PLANS, and HELP. Below the navigation, there are tabs for General, Services, Contacts, Divisions, Classes, Security, and Summary. The 'General' tab is active, displaying a form with the following fields:

- Federal Employer Identification Number:** 11 - 123456
- Company Name:** Sample Co.
- HR Contact:** Brennan Young
- Remit Premium To:** Lindsey Cullison
- Client Services Rep:** SMG Services
- Group Number:** B01234
- Eligible Employee Count:** 2501
- Historical Turnover Rate:** 0 ?
- Company Address*:** 4609 Regent Boulevard
- City, State, ZIPCode*:** Irving TX 75063

There is an 'Update Your Profile ?' button at the bottom of the form. A copyright notice at the bottom reads: 'Copyright © 2021 WageWorks, Inc. All Rights Reserved.'

Services

Shows you a listing of the current services that are being provided by HealthEquity/WageWorks.

The screenshot shows the 'Services' page in the HealthEquity WageWorks portal. The navigation menu is similar to the previous screenshot, but the 'Services' tab is active. The page title is 'Services'. Below the title, there is a list of services provided by WageWorks, effective 4/1/2015. The services listed include:

- WageWorks Provided Services Effective 4/1/2015**
- C6303-COBRA Takeover Continuant Fee**
- C3146-Retro COBRA General Notice-CLC01**
Within 14 days of receipt of list of covered employees and dependents living at any address other than covered employee's address, distribute initial notification of rights to continuation coverage to addresses on such list. This option applies to Participants hired before the contract effective date.
- C5850-COBRA General Notice-CLC01**
Within 14 days of receipt of list of covered employees and dependents living at any address other than covered employee's address, distribute initial notification of rights to continuation coverage to addresses on such list. This option applies to Participants hired on or after the contract effective date.
- H6151-HIPAA Special Enrollment Notice-CLH01**
Within 14 days of receipt of list of covered employees and dependents living at any address other than covered employee's address, distribute initial notification of rights to certificates of coverage to addresses on such list. This option applies to Participants hired on or after the contract effective date.
- C5752-COBRA Notice and Plan Alternatives-CLC02**
Within 14 days of receipt of notification from Client of a COBRA Qualifying Event, WageWorks will prepare and mail, with Certificate of Mailing, a COBRA Eligibility Notification Letter to the address of each Eligible Participant. The COBRA Eligibility Notification Letter will include additional COBRA information necessary for the Eligible Participants to make an informed decision.
- H4863-Waiting Period HIPAA Certificate-CLH04**
- D5966-Send Direct Bill Invoice**
Distribute Direct Bill invoices for the premium amount specified by Client to the Direct Bill Participant addresses provided. The Direct Bill invoice will include all past and current amounts owed and will include a coupon that may accompany payment to Company incorporating an attestation from the Direct Bill Participant that he or she, and their covered dependents, remain eligible for coverage pursuant to the terms of Client's Plan(s).
- D5467-Direct Bill Past Due Notice-CLR09**
Prepare and distribute premium billing to the address of each Direct Bill Participant for all past and current amounts owed to activate the continuation of coverage. Such billing will include a coupon that must accompany payment to WageWorks that incorporates an attestation from such Participant that he or she, and their covered dependents, remain eligible for coverage pursuant to the terms of Client's Plan(s).
- D1098-Fixed Rate Per Direct Bill Participant**
- S06E3-Cal COBRA Enrollment - Fed COBRA Expiration-CLC35**
- C57H0-Federal Cobra Subsidy Extension Notice**
- C57H8-Federal Cobra Subsidy Extension Insert**
- C3900-Standard Option 1 Active COBRA**
- C3902-Standard Option 2 Active COBRA**
- C3901 Open Enrollment Set-up Fee**
- S56RZ-CA HIPP Service**
- S2750-Cal-COBRA Monthly Administration Fee**
- S5754-Cal-COBRA Notice and Plan Alternatives**
- S5857-Cal-COBRA General Notice**
- S635Z-Cal-COBRA Takeover Continuant Fee**
- R1572-Fixed Rate Per Medical FSA/DCAP Plan Participant**
- R1572-Fixed Rate Per Medical FSA/DCAP Plan Participant**
- C3759-COBRA Expiration Notice-CLC13**
Provide Paid Participant 60 (sixty) days notice prior to expiration of continuation coverage, the date that the maximum period of COBRA continuation will expire.

Contacts

Allows you to view, update and add new contacts to your account. This information should be reviewed regularly to ensure client, TPA and carrier contacts are always up to date.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL HELP

General Services **Contacts** Divisions Classes Security Summary

Contacts

[Current Contacts](#)

Type	Name	Phone	Email	Options
Administrative	Danielle Tucker	214-596-7761	dtucker@conexis.com	view/edit

[Add New Contact](#)

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Divisions

Allows you to view and update divisions associated with your account.

HealthEquity WageWorks

HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL HELP

General Services Contacts **Divisions** Classes Security Summary

Divisions

Note: If you are going to upload your employee information via file transfer, your divisions can be created automatically and you do not need to add them on this screen.

Division Name	Administrative Contact	File Transfer Name (optional)	Options
<input type="text"/>	Danielle Tucker <input type="button" value="v"/>	<input type="text"/>	
<input type="text"/>	Danielle Tucker <input type="button" value="v"/>	<input type="text"/>	
<input type="text"/>	Danielle Tucker <input type="button" value="v"/>	<input type="text"/>	
<input type="text"/>	Danielle Tucker <input type="button" value="v"/>	<input type="text"/>	
<input type="text"/>	Danielle Tucker <input type="button" value="v"/>	<input type="text"/>	

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Classes

Allows you to view and update classes associated with your account.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL ACCOUNT-BASED

General Services Contacts Divisions **Classes** Security Summary

Employee Classes

Class Name	Class Code	Class Status	HIPAA Eligible	Options
CRL - County Retiree - Subsidized	CRL	Active	Yes	2 Participant(s)
CRT - County Retiree - Non-Subsidized	CRT	Active	Yes	5 Participant(s)
ERL - USD Retiree - Subsidized	ERL	Active	Yes	10 Participant(s)
ERT - USD Retiree - Non-Subsidized	ERT	Active	Yes	2 Participant(s)
Executive		Active	Yes	5 Participant(s)
NJ1		Active	Yes	23 Participant(s)
Retiree		Active	Yes	26 Participant(s)
Retiree HI >65	RETHI >65	Active	Yes	26 Participant(s)
Retiree HI <65	RETHI<65	Active	Yes	16 Participant(s)
Sample:0251		Void	Yes	0 participants
State Direct Bill/Retiree Participant	RET	Active	Yes	2 Participant(s)
Union		Active	Yes	2 Participant(s)

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Security

Includes a listing of any contacts who have access to view your account.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL ACCOUNT-BASED PLANS HELP

General Services Contacts Divisions Classes **Security** Summary

Security

User Account	Name	Email Address	Last Login	Global Status	Global Type	Global Access	Remove Client Access
TUser7	Test User	<input type="text" value="cmcghehey@conexis.com"/>	4/11/2014	Active	Client Administrator	Full Access	<input type="checkbox"/>

[Update](#)

1 Users Found.

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Summary

Shows a full summary of all aspects of your account, including system settings, contacts, carriers, plans and rates.

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HOME
EMPLOYER SETUP
HEALTH PLANS
REPORTS
PARTICIPANTS
COBRA
DIRECT BILL
ACCOUNT-BASED PLANS
HELP

Configuration Summary for Sample Co.
2/18/2021 10:14:53 AM

Company Information

Employer Name	Sample Co.	Eligible Employees	2451
COBRA Continuants	0	Turnover Rate	0
Corporate Address	4609 Regent Boulevard Irving TX 75063		

Client Option Information

(Click the client option name to see the description)

Option Name	Option Value
Open Enrollment Fax Number	877-775-9399
Participant COBRA Services Phone Number	1-877-722-2667
Participant Cafeteria Plan Services Phone Number	(866) 279-8385
Allow Web Based Participant 1250 Enrollment	
Allow Web Based Participant COBRA Election	1
Participant Web Access	1
Online Participant Open Enrollment	1
Online Participant DB Open Enrollment	0
Online Enrollment Policy	2
Run out period for Cafeteria Plans	366
FSA Claim/Mailing Address Line 1	P.O. Box 227197

SECTION 4 – HEALTH PLANS

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL ACCOUNT-BASED PLANS HELP

Carriers Plans Rates Enrollments Eligibility Availability

Health Plans

Welcome to our Health Plan configuration pages.

In this section, you can view and configure your Carrier, Health Plan and Rate configuration.

New Feature!

Open Enrollment Workbook Wizard: Walk through your OE Plan & Rate Workbook to capture important details, plan and rate information needed for WageWorks to successfully assist you with your upcoming Open Enrollment period.

Carriers: Carriers are defined as Health Providers, and the carriers for your health plans should be setup under the Carriers tab. Examples of carriers typically configured in our system are "United Healthcare", "Prudential", and "Aetna".

Plans: Once you have configured your carriers, you should enter your health plans. Health Plans are the options that employees select when choosing their options. Typical Health plan names configured in the system are "Humana PPO 90%" or "Humana HMO". Select your names carefully, these names will appear on the COBRA election forms mailed to continuants from which they select their health plans.

Rates: The rates tab gives you a list of all carriers, plans and rates that are configured in our system. We encourage you to print and validate the rates appearing here since these are the amounts that will be billed to COBRA Continuants and remitted to the plan sponsor.

Enrollment Periods: Establish or View Enrollment Periods defined for Rate Changes and/or Open Enrollment Periods. Click [here](#) to view the Rate Change / Open Enrollment Checklist.

Eligibility: This tab will give you the ability to verify and sign off on existing eligibility notations by plan.

Availability: This section will give you the ability to view, verify, and sign off on existing plan availability rules. Click [here](#) to view a list of available rules.

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There are seven different sections within the Health Plans tab, including:

- **Open Enrollment Workbook Wizard** – This will only show if you are approaching your upcoming open enrollment period and is used to provide important OE and plan / rate information to HealthEquity.
- **Carriers** – Carriers or TPAs for the company's health plans should be set up under the Carriers tab.
- **Plans** – Health plans are the options that employees select when choosing their plan types such as a PPO or HMO.
- **Rates** – Provides a list of all carriers, plans and rates that are configured in the system.
- **Enrollment Periods** – Users can view enrollment periods defined for rate changes and/or annual/open enrollment periods.
- **Eligibility** – Verify existing eligibility notations by plan.
- **Availability** – View existing plan availability rules.

Open Enrollment Workbook Wizard

If you are approaching your upcoming open enrollment period, you can access the **Open Enrollment Workbook Wizard**. This feature will help you gather your OE information and help get your new plan and rate information for HealthEquity to process.

For more information about this process, you can access a dedicated user guide that walks you through the steps.

Carrier

Allows you to view, update and add new carriers to your account. This should be reviewed and updated annually at open enrollment, or when there is a change in carrier

The screenshot displays the 'Carriers' page in the HealthEquity WageWorks portal. The page includes a navigation bar with options like HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, and HELP. Below this, a sub-menu highlights 'Carriers', 'Plans', 'Rates', 'Enrollments', 'Eligibility', and 'Availability'. The main content area is titled 'Carriers' and contains a descriptive paragraph: 'Please enter your current carrier(s) for the insurance plans sponsored by this employer. A carrier is any commercial insurance company, United Healthcare, Aetna, or underwriter that provides insurance protection, such as medical, dental, life, and disability, for employer benefit plans.' Below the text is a table with the following data:

<u>Carrier Name</u>	<u>Group Number</u>	<u>Status</u>	<u>Options</u>
UHC MEDICAL	00000	Active	View/Edit Plans
Caremark RX	FPLRX	Active	View/Edit Plans
Group Health		Active	View/Edit Plans
Kaiser - CO	08766	Active	View/Edit Plans
CIGNA	3331155	Active	View/Edit Plans

Below the table is a purple button labeled 'Add New Carrier' with a red question mark icon to its right. At the bottom of the page, the copyright notice reads: 'Copyright © 2021 WageWorks, Inc. All Rights Reserved.'

Plans

Allows you to view, update and add new plans to your account. This should be reviewed annually at open enrollment, or when there is a change in plans.

Health Plans

Please enter your (health) or benefit plans here as they associate with your carrier(s), most medical and dental plans are COBRA/HIPAA eligible. Please contact us if you need assistance determining which plans are COBRA eligible.

For online help regarding the setting up of plans, please click [here](#) ?

Note: Some availability policies cannot be changed online. If you need to make a change to an availability policy that does not allow you to select it, please contact your Relationship Management team.

Plan Name	Carrier	Plan Type	Eff. Date	Plan Ends Type	Availability	Options
Blue Shield (A)	Blue Shield	Medical	11/1/2014	No Change	All Participants	View/Edit Participants
Guardian Life Vision	Guardian Life	Vision	1/1/2015	No Change	All Participants	View/Edit Participants
Kaiser HSA/HMO	Kaiser	Medical	12/1/2014	No Change	All Participants	View/Edit Participants

[Add New Plan](#) ?

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Rates

Allows you to view all of the rates associated with your plans, including current, historical and subsidized. We encourage you to print, audit and validate these rates, since these are the amounts that will be billed to COBRA continuants and remitted to the plan sponsor.

Rate Information

Click [here](#) to view all rates.

Click [here](#) to view subsidized rates.

Click [here](#) to view rate tables.

Health Plan	Plan Type	Coverage Type	Rate Start	Rate End	Premium	Premium + Admin. Fee
(c) Aetna Non-Medicare Eligible Retiree Plan	Medical	Spouse + Child(ren)	1/1/2016		\$1,558.41	\$1,589.58
		Child(ren)	1/1/2016		\$1,211.12	\$1,235.34
		Family	1/1/2016		\$1,905.66	\$1,943.77
		Employee Only	1/1/2016		\$347.29	\$354.24
		Spouse Only	1/1/2016		\$347.29	\$354.24
		Employee + Spouse	1/1/2016		\$694.54	\$708.43
Blue Shield (A)*	Medical	Employee + Child(ren)	1/1/2016		\$1,558.41	\$1,589.58
		Family	11/1/2014		\$0.00	\$0.00
		Employee Only	11/1/2014		\$0.00	\$0.00
		Employee + Spouse	11/1/2014		\$0.00	\$0.00
		Employee + Child	11/1/2014		\$0.00	\$0.00
		Employee + Children	11/1/2014		\$0.00	\$0.00
Guardian Life Vision*	Vision	Family	1/1/2015		\$24.48	\$24.97
		Employee Only	1/1/2015		\$9.01	\$9.19
		Employee + Spouse	1/1/2015		\$15.17	\$15.47
		Employee + Child	1/1/2015		\$15.47	\$15.78
		Employee + Children	1/1/2015		\$15.47	\$15.78
		Employee + Children	1/1/2015		\$15.47	\$15.78
Kaiser HSA/HMO*	Medical	Family	12/1/2014		\$0.00	\$0.00
		Employee Only	12/1/2014		\$0.00	\$0.00
		Employee + Spouse	12/1/2014		\$0.00	\$0.00
		Employee + Child	12/1/2014		\$0.00	\$0.00
		Employee + Children	12/1/2014		\$0.00	\$0.00
		Employee + Children	12/1/2014		\$0.00	\$0.00

*--Employees will not be charged an administrative fee and COBRA participants will be charged an administrative fee of 2%.

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Enrollment Periods

Allows you to view all of your open enrollment materials sent out by HealthEquity/WageWorks.

Enrollments

Each time there is a change to a plan, other changes are required by our client services team. We will contact you if any additional information is needed.

To view our recommended setup checklist, click [here](#).

New Plan Effective Date	Status	Notice Mailing Start Date	Service Type	Options
1/1/2015	Closed	10/29/2014	Plain Paper Personalized Enrollment Forms with Inserts	Enrolled Not Enrolled Plans

[Add](#)

To obtain pricing and details about our open enrollment services, please click [here](#) to contact your Relationship Management team.

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Eligibility

Allows you to view all of your eligibility details and rules that have been established for each of your carriers.

Plan Eligibility

Carrier: Aetna - Medical Group Number: 0810072003

Plan Name	Eligibility Type	Eligibility Codes	Options
(c) Aetna Consumer Choice 2015	Plan + Employee Class	Not Specified	Participants
(c) Aetna Non-Medicare Eligible Retiree Plan	Plan + Employee Class	Not Specified	Participants
(c) Aetna Select EPO 2015	Plan + Employee Class	Not Specified	Participants
(c) Choice PPO - Aetna 2015	Plan + Employee Class	Not Specified	Participants

Carrier: Blue Shield Group Number: 999999

Plan Name	Eligibility Type	Eligibility Codes	Options
Blue Shield (A)	Plan Level or None	Not Specified	Participants

Carrier: Guardian Life Group Number: 525252

Plan Name	Eligibility Type	Eligibility Codes	Options
Guardian Life Vision	Plan Level or None	Not Specified	Participants

Carrier: Kaiser Group Number: Pending

Plan Name	Eligibility Type	Eligibility Codes	Options
Kaiser HSA/HMO	Plan Level or None	Not Specified	Participants

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Availability

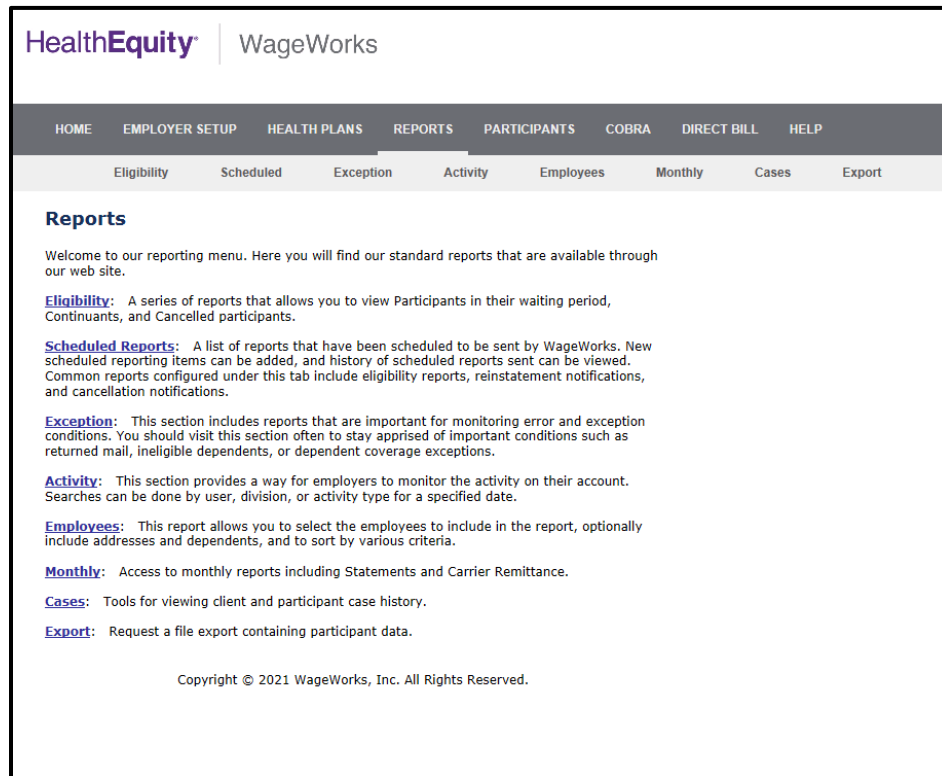
Allows you to view the current availability policy and details associated with all your plans.

The screenshot displays the HealthEquity WageWorks interface. At the top, the logo and 'WageWorks' are visible. A navigation bar includes links for HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, and HELP. Below this, a sub-navigation bar shows Carriers, Plans, Rates, Enrollments, Eligibility, and Availability (which is underlined). The main content area is titled 'Plan Availability' and lists three plans: Blue Shield (A), Guardian Life Vision, and Kaiser HSA/HMO. Each plan has a table with three columns: Available To, Availability Policy, and Availability Detail. All three plans show 'Employees, Continuants' for 'Available To', 'All Participants' for 'Availability Policy', and 'No Rules Defined' for 'Availability Detail'. A mouse cursor is visible over the 'Availability Detail' link for the Kaiser HSA/HMO plan. At the bottom of the page, a copyright notice reads: 'Copyright © 2021 WageWorks, Inc. All Rights Reserved.'

Plan Name	Available To	Availability Policy	Availability Detail
Blue Shield (A)	Employees, Continuants	All Participants	No Rules Defined
Guardian Life Vision	Employees, Continuants	All Participants	No Rules Defined
Kaiser HSA/HMO	Employees, Continuants	All Participants	No Rules Defined

SECTION 5 – REPORTS

The Reports section includes a list of all the standard reports scheduled for delivery to the website for your use. Users can view new reports and see a history of reports. Types of reports include eligibility reports, reinstatement notifications and cancellation notifications. Our website gives the plan sponsor access to COBRA participant reports, which are always available.



Within the reports page, you can view standard reports available through this website. You'll see a listing and a description of each. There are seven different sections within the reports, including:

- **Eligibility** – A series of reports to view participants in their waiting period, continuants and canceled participants.
- **Scheduled Reports** – A list of reports that HealthEquity will produce. You can view a history of scheduled and produced reports. Common reports under this tab include eligibility reports, reinstatement notifications and cancellation notifications.
- **Exception** – This section includes reports that are important for monitoring error and exception conditions. You should visit this section often to stay apprised of important conditions such as returned mail, ineligible dependents or dependent coverage exceptions.
- **Activity** – This section provides a way for employers to monitor the activity on their account. Searches can be done by user, division or activity type for a specified date.
- **Employees** – This report allows you to select the employees to include in the report, optionally include addresses and dependents, and to sort by various criteria.
- **Monthly** – Access to monthly reports including statements and carrier remittance.
- **Cases** – Tools for viewing client and participant case history.
- **Export** – Request a file export containing participant data.
- **Processing Reports** – Includes results from the processing of the inbound electronic files.

Eligibility

These reports allow you to see all participants that are pending, enrolled or in canceled status.



- **COBRA Continuation Pending Report** – List of participants who are in their 60-day waiting period and their election expiration date (deadline)
- **Status of COBRA Continuants** – Shows COBRA participant’s payment status and coverage details; participant inquiry can also be accessed through this option
- **Status of Direct Bill Participants** – Shows direct bill participant’s payment status and coverage information; participant inquiry can also be accessed through this option
- **Status of Direct Bill Participants with History** – Shows direct bill participant’s payment status and coverage information, including history
- **Canceled Eligible Employees and Continuants** – This report includes participants who were eligible to elect COBRA but never elected coverage; it also includes a list of participants who were canceled for non-payment of premium
- **Future Qualifying Events** – The events will not be processed completely until the actual qualifying event date passes, depending on your account setup
- **Covered Participants by Plan** – Displays historical information of participants on a plan
- **All Covered Employees by Plan** – Lists all employees that are covered by plan
- **COBRA Continuants as of December 31 of the Prior Year by Plan** – Historical lists of participants most frequently used for employers’ 5500 form filing requirements, sorted by plan
- **COBRA Continuants as of December 31 of the Prior Year by Participant** – Historical lists of participants most frequently used for employers’ 5500 form filing requirements, sorted by participant
- **Participants in COBRA Election Phase with Effective Dates Prior to December 31 of Previous Year by Participant** – Historical lists of participants in election phase who have effective dates prior to December 31 of previous year

Scheduled Reports

A list of reports that have been or can be scheduled for delivery to the website. Users may view new reports and look up the history of scheduled and sent reports. Common reports configured under this tab include eligibility reports, reinstatement notifications and cancellation notifications.

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Scheduled Reports

[Filter Scheduled Reports](#)

Report Type: ▾

Recipient: ▾

Carrier: ▾

Reference Number:

[Filter](#)

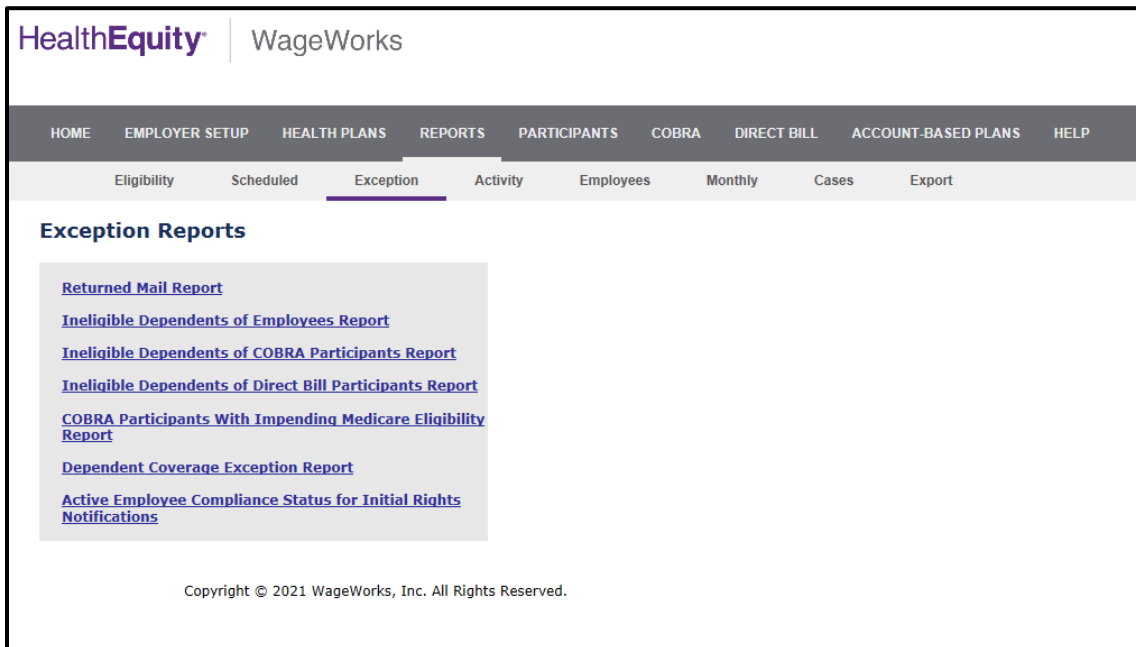
Standard Reports - Returned Mail Report
 This report identifies when participant notices are returned. Employers should review this report, provide new addresses when available and request re-mailing of notices as appropriate.

Report:	Returned Mail Report	Reference Number:	149859
Frequency:	<input type="text" value="Weekly (Fridays)"/> ▾	Status:	<input type="text" value="Active"/> ▾
Content:	<input type="text" value="Changes Since Last Report"/> ▾	End Date: (Optional)	<input type="text"/>
Start Date:	<input type="text" value="5/10/2005"/>		
Recipient(s):	Client Contact (Email - Unencrypted) - Update		
History:	Details		

Eligibility Reports - Standard Eligibility Communication
 This report includes information on all elected and paid COBRA participants. Participants will not appear on this report until they have made first payment and need to be enrolled by carriers.

Report:	Standard Eligibility Communication	Reference Number:	360070
Frequency:	<input type="text" value="Monthly"/> ▾	Status:	<input type="text" value="Active"/> ▾
Content:	<input type="text" value="Full Report"/> ▾	End Date: (Optional)	<input type="text"/>
Start Date:	<input type="text" value="5/8/2009"/>		
Recipient(s):	Aaron Baron (Email - Unencrypted) - Update		
Carrier(s):	Michelle - Update		
History:	Details		

Exception Reports



- **Returned Mail Report** – If mail is returned to HealthEquity/WageWorks as undeliverable, the information will be available in this report. To update the address, go to the Participant Search webpage, click Update and enter the new information.
- **Ineligible Dependents of Employee Report** – Employers should run this report at least once a month to stay current as to when a dependent ceases to be eligible for active or COBRA benefits due to the limiting age. A qualifying event may be processed directly from this report. HealthEquity will NOT automatically terminate an ineligible dependent due to limiting age.
- **Ineligible Dependents of COBRA Participants Report** – This report uses the earliest non-student and student age limits based on the configuration of each of your carriers. If you have different age limits for your various carriers, some of the dependents on this report may not be ineligible. A qualifying event may be processed directly from this report to remove a dependent from the report.
- **Ineligible Dependents of Direct Bill Participants Report** – This report uses the earliest non-student and student age limits based on the configuration of each of your carriers. If you have different age limits for your various carriers, some of the dependents on this report may not be ineligible.
- **COBRA Participants with Impending Medicare Eligibility Report** – This report should be used to determine when COBRA eligibility should end because of Medicare eligibility. This report could also potentially display Medicare-eligible participants, who should not be canceled. Please consult with your legal advisors before canceling COBRA based on information contained in this report.
- **Dependent Coverage Exception Report** – When dependent information is not complete and accurate or when a dependent's coverage option does not match the family configuration, users can either update the HealthEquity/WageWorks records here or mark them as acceptable to remove this exception from the report.
- **Active Employee Compliance Status for Initial Rights Notifications** – General summary showing purchased or unpurchased Initial Rights Notification compliance status for active employees.

Activity

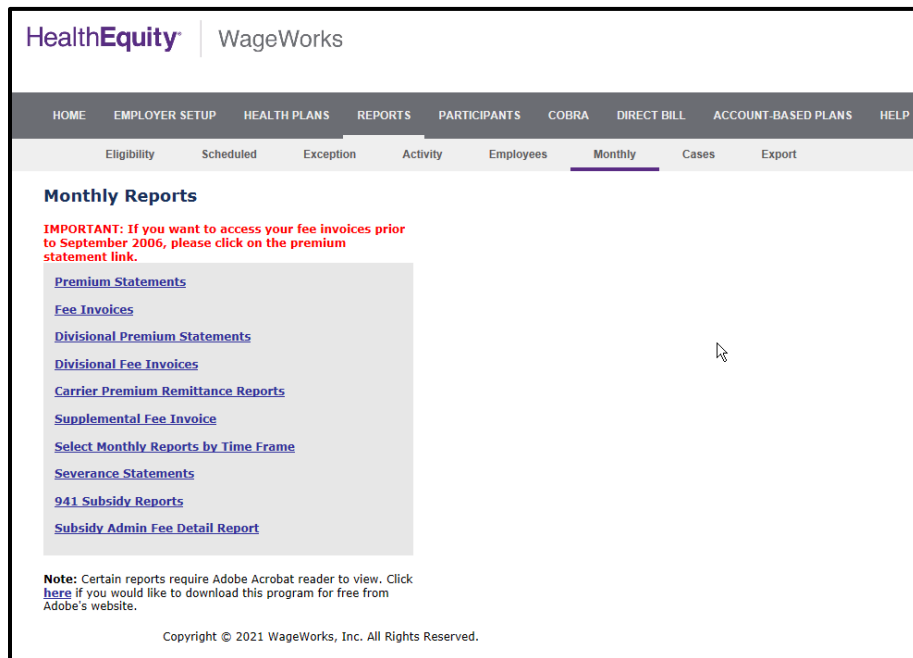
Employers can use the activity page to retrieve statistical COBRA participant information, found under the Reports tab, Activity Reports page. Data can be retrieved by a submission date range or time period. Users then have the option to sort the data by date, employee name, activity type or Social Security number. For example, if the Department of Labor (DOL) wants to see all of the HIPAA notices sent out to a particular employee, the company would select the activity type option. Then select HIPAA Rights Sent by Employer from the pull-down menu. After displaying the results, the view option can be used to access the Participant Inquiry page for a particular client.

Employees

Users may generate a report that lists the plan sponsor participants by employee name, COBRA continuants, employee and continuants, and selected division.

Monthly

Users may view standard monthly reports including statements and carrier remittance reports.



- **Premium Statements** – Monthly statements listing qualified beneficiaries’ names, types of coverage and premiums collected throughout the month.
- **Fee Invoices** – Monthly plan sponsor account fee invoice using a breakdown of administration, activity and setup fees.
- **Divisional Premium Statements** – Monthly premium statements by division.
- **Divisional Fee Invoices** – Plan sponsor account fee invoice by division.
- **Client Remittance Report** – Provides detail to support the net settlement check for COBRA and Direct Bill clients.
- **Carrier Remittance** – Shows participants who have elected and paid for COBRA continuation coverage through the active coverage period. If there is more than one health plan, the report will have multiple pages.
- **Supplemental Fee Invoice** – Lists participants that make up Direct Bill billing line item in fee invoice.
- **Select Monthly Reports by Time Frame** – You can select a specific month (via dropdowns) for Premium Statement, Fee Invoice and Carrier Remittance.
- **Severance Statements** – Invoices applicable to pay carrier clients when a participant is on severance.
- **941 Subsidy Reports** – Historical reporting used during American Recovery and Reinvestment Act (ARRA).
- **Subsidy Admin Fee Detail Report** – Lists participants that make up the administrative fees line item in Premium Statement.

Please note: Adobe Acrobat Reader software is needed to view and print statements and fee invoices. Adobe Acrobat Reader is available to download at no cost from www.adobe.com.

Cases

This section provides tools for viewing client and participant case history.

The screenshot displays the 'Cases' section of the WageWorks client portal. At the top, the 'HealthEquity' logo and 'WageWorks' name are visible. Below this is a navigation bar with options: HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, ACCOUNT-BASED PLANS, and HELP. A secondary navigation bar includes: Eligibility, Scheduled, Exception, Activity, Employees, Monthly, Cases (highlighted), and Export. The main content area is titled 'Cases' and contains search filters: 'Date Opened From' and 'To' (both MM/DD/YYYY), 'CaseStatus' (None Selected), and 'CaseType' (None Selected). Below these are 'CaseCategory' (None Selected) and 'Case Number' (Case Number) fields. Two buttons, 'Display Results' and 'Clear', are positioned to the right of the Case Number field. At the bottom of the page, a copyright notice reads: 'Copyright © 2021 WageWorks, Inc. All Rights Reserved.'

Export

This section allows you the ability to extract some of your data from the system, including data for your active employees, enrolled and pending COBRA participants and enrolled Direct Bill participants.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL ACCOUNT-BASED PLANS HELP

Eligibility Scheduled Exception Activity Employees Monthly Cases **Export**

Export

To request an export of your data from WageWorks, please answer the following questions.

If your name does not appear in the list as an available recipient, click [here](#) to update your e-mail address and encryption settings.

Reports sent from this screen will be encrypted using the encryption settings on the contact record, usually within 20 minutes of your request.

Export Requested:
Send Report To: [Add / Edit Contacts](#)

Active Employees – This report contains information on all covered and non-covered active employees. Demographic information is provided for each participant.

COBRA Continuants – This report contains information for all COBRA continuants with a WageWorks system status of 'Active'. The report includes demographic information and dependents. The report also provides plan and coverage information as well as the COBRA eligibility begin date, end date and current paid through date.

Election Pending Participants – This report contains information for all individuals that have experienced a qualifying event but have not elected to continue COBRA. The report contains demographic and dependent information. The report also provides the individuals plan information, qualifying event date and qualifying event reason.

Direct Bill Participants – This report contains information about all Direct Bill participants with a WageWorks system status of 'Active'. The report includes demographic information and dependents. The report also provides plan and coverage information as well as the coverage start and end dates.

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SECTION 6 – PARTICIPANTS

The Participant pages are used to view or update employee or dependent records. They are also used to process employee or dependent qualifying events, rehires, disability extensions and takeovers. You can search for a participant's information by Social Security number, employee name and hire date.

Participant Search

The screenshot shows the HealthEquity WageWorks interface. At the top, there is a navigation bar with the following items: HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS (highlighted), COBRA, DIRECT BILL, ACCOUNT-BASED PLANS, and HELP. Below the navigation bar, there are four tabs: Search (highlighted), View, Update, and Add. The main content area is titled "Participant Search" and contains a form with the following fields: Social Security Number, Employee Number, Last Name, First Name, Hire Date Range (with a "to" field), Account Number, Document ID, and Image Name. Below the form are four buttons: Advanced, Search, Reset, and Show All. A tip is provided below the form: "Tip: Social Security Numbers can be entered with or without hyphens. When searching by name, you need not enter the whole name - searching for 'At' in the last name field would return participants with last names beginning with 'At'." At the bottom of the form area, there is a copyright notice: "Copyright © 2021 WageWorks, Inc. All Rights Reserved."

At this level you have the option to search for a specific participant record by entering in their Social Security number, name, account number or other information. You also have the option to show all you participants, both current and former.

Tips: Social Security numbers can be entered with or without hyphens. Also, when searching by name, users do not need to enter the whole name - searching for "At" in the last name field would return participants with last names beginning with "At."

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL ACCOUNT-BASED PLANS HELP

Search View Update Add

Search Results

Searching by Last Name for sample*

SSN	Participant Name	Division	Hire Date	Status	Options
XXX-XX-3222	Sample_Child	Inside Sales	1/1/2000	Cancelled	View Rehire
XXX-XX-8978	Sample_Christi		1/1/2011	Employee	View Update Process QE
XXX-XX-7474	Sample_David		1/1/2013	Cancelled	View Rehire
XXX-XX-0780	Sample_Doc		5/10/2005	Cancelled	View Rehire
XXX-XX-3122	Sample_InfoSec	cat	1/1/2011	Employee	View Update Process QE
XXX-XX-0001	Sample_Jane	Corporate	9/1/2003	Cancelled	View Rehire
XXX-XX-4987	Sample_Jason		9/1/2005	Continuation Pending	View Update Rehire
XXX-XX-0003	Sample_John	CALL CENTER	1/1/2004	Cancelled	View
XXX-XX-1290	Sample_Lindsey		10/1/1970	Cancelled	View Rehire
XXX-XX-4545	Sample_Lindsey		10/2/2000	Cancelled	View Rehire
XXX-XX-4343	Sample_Lindsey		10/2/2000	Cancelled	View Rehire
XXX-XX-3456	Sample_Lindsey		10/2/2000	Cancelled	View Rehire
XXX-XX-4128	Sample_Man	B01	1/1/2000	Cancelled	View Rehire
XXX-XX-6954	Sample_Mary		1/1/2013	Cancelled	View Rehire
XXX-XX-1234	Sample_Open Enrollment	Atwood	10/2/2000	Cancelled	View Rehire
XXX-XX-0012	Sample_Participant		10/1/2000	Cancelled	View Rehire
XXX-XX-1278	Sample_Rob		10/2/2000	Cancelled	View Rehire
XXX-XX-1111	Sample_Sally	Corporate	10/4/1999	Employee	View Update Process QE
XXX-XX-3636	SAMPLE_SALLY	North Division	2/1/2001	Cancelled	View

Once you locate your participant(s), the following options are available based on their current status:

- **View** – View all history at the participant level. Email can be sent to HealthEquity/WageWorks with any questions or concerns about the participant.
- **Update** – Make necessary changes to the employee or dependent information including, but not limited to, address, date of hire, date of birth, dependent address and dependent qualifying event.
- **Process QE** (Qualifying Event) – Process a qualifying event.
- **Rehire** – Make changes to the participant information for rehired employees (i.e., address or dependent changes).
- **Disability Extension** – If a qualified beneficiary meets legal requirements for a disability extension, the information can be added in this section.
- **Takeover** – Client will send HealthEquity/WageWorks the files containing employees with different company numbers. If the client realizes that an employee was listed under a certain company number by mistake, they can go into the takeover option from the Participant Inquiry page to correct the mistake.

View

The view option allows you to identify and see your active employees as well as your pending, current and terminated COBRA & Direct Bill participants.

The screenshot shows the 'Participant View' page in the HealthEquity WageWorks system. The top navigation bar includes 'HOME', 'EMPLOYER SETUP', 'HEALTH PLANS', 'REPORTS', 'PARTICIPANTS', 'COBRA', 'DIRECT BILL', 'ACCOUNT-BASED PLANS', and 'HELP'. Below this, a secondary navigation bar has 'Search', 'View', 'Update', and 'Add', with 'View' selected. The main content area is titled 'Participant View' and contains a list of links categorized by status: Active Employees, COBRA, Direct Bill, and Cancelled. Each category has two columns of links. A copyright notice is at the bottom.

Category	Link 1	Link 2
Active Employees:	Ineligible for Coverage	Eligible, Not Covered
	Plan Participants (Covered)	FSA Plan Participants
COBRA:	Electing COBRA	Continuing COBRA
Direct Bill:	Active	Active Past Deadline
Cancelled:	Last 60 Days	All Cancelled

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Update

The update option allows you to quickly view and update key information for your active employees and COBRA participants.

The screenshot shows the 'Participant Update' page in the HealthEquity WageWorks system. The top navigation bar is the same as in the 'View' page. The secondary navigation bar has 'Search', 'View', 'Update', and 'Add', with 'Update' selected. The main content area is titled 'Participant Update' and contains a list of links categorized by information type: General, Discrimination Testing, and COBRA. Each category has two columns of links. A copyright notice is at the bottom.

Category	Link 1	Link 2
General:	Student Status	Division
	Hire Date	Employee Number
	Phone Number	Pay Schedule
Discrimination Testing:	Key Employee	5% Shareholder
	Highly Compensated Under POP	Highly Compensated Under Medical FSA
	Salary Under 25K	
COBRA:	Qualified Beneficiary	

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Add

At this level you have the ability to enter a new employee's compliance information into the HealthEquity/WageWorks system.

The screenshot shows the HealthEquity WageWorks interface. At the top left is the logo. A navigation bar contains: HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, ACCOUNT-BASED PLANS, HELP. Below this is a sub-menu with: Search, View, Update, Add. The 'Add' option is selected. The main heading is 'New Participant'. Below it is a form with the label 'Social Security Number of employee to add', an input field, and 'Search' and 'Reset' buttons. A note below the form reads: 'Note: Please enter the social security number of the participant you wish to add. If this participant is already present, you will be able to view the records; otherwise you will be taken to a form for entering the employee information.' At the bottom is the copyright notice: 'Copyright © 2021 WageWorks, Inc. All Rights Reserved.'

Adding a New Employee

To add a new participant:

- Within the secure website, select the top menu option of **Participants**.
- A new set of gray sub-menu options will appear. Select the **Add** option.
- Enter the new employee's Social Security number, and the system will search for an existing Social Security number. If none appears, you will need to complete the form.

This is an identical screenshot to the one above, showing the 'New Participant' form in the HealthEquity WageWorks system. It includes the navigation bar, sub-menu, form fields, and copyright notice.

- Complete all fields and click **Next**.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL ACCOUNT-BASED PLANS HELP

Search View Update **Add**

New Participant

[Participant Information](#)

Social Security Number: 123-45-0009

First Name, MI, Last Name: [Input Fields]

Division / Location: Please Select [Dropdown]

Employee Class: [Dropdown]

Employee Number: * [Input Field]

Birth Date: [Input Fields]

Hire Date: [Input Fields]

Gender: Male [Dropdown]

Covered on COBRA Eligible Plan: Yes [Dropdown]

Coverage Waiting Start Date: [Input Fields]

Coverage Begin Date (if employee is already covered): [Input Fields]

Address: [Input Fields]

Address 2: [Input Fields]

City, State, Zip: [Input Fields] [Dropdown] [Input Fields]

Email Address: * [Input Fields]

Image Name: * [Input Fields]

* Indicates an optional field

[Employer-Specific Fields](#)

Benefit Group: * [Input Fields]

Group Number: * [Input Fields]

Sub-Group: * [Input Fields]

- On the Data Verification page you can review the information. Select **Finish** to save the new employee's data. A confirmation page will appear showing that the employee and associated dependent(s) were processed in the system.

SECTION 7 – COBRA

In the COBRA Participant Management section, you can process qualifying events and enter takeover COBRA participants.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS **COBRA** DIRECT BILL ACCOUNT-BASED PLANS HELP

Qualifying Event Dependent Qualifying Event Takeover

COBRA Participant Management

Our fully compliant COBRA Participant Management page provides you with an easy-to-use system for accessing COBRA and HIPAA-related information about your participants.

Qualifying Event: To notify us of a qualifying event that requires the qualified beneficiary to be sent a COBRA Election Notice, click [Qualifying Event](#), then enter the employee's Social Security number. If the individual is already in our system, you will simply enter the qualifying event date and the type of qualifying event, and select the plans. If the individual is not already in our system, you will also need to enter their demographic information.

Dependent Qualifying Event: Click [Dependent Qualifying Event](#) and locate the dependent by searching by either the employee or dependent Social Security number. Once you have found the dependent, click the Qualifying Event button. **Note:** Before a qualifying event can be processed for a dependent, that dependent must already be present in our system and identified as a dependent of the employee. Dependents can be added under an employee in [Participant Search](#). Once on the page, click the update link and add the dependent information.

Takeover: To enter an individual who previously elected COBRA through a prior administrator and should now be billed by WageWorks, click [Takeover](#). The billing start date on this form determines when WageWorks will begin billing and remitting premiums for this continuant. Entering an individual as a takeover will not produce an election notice.

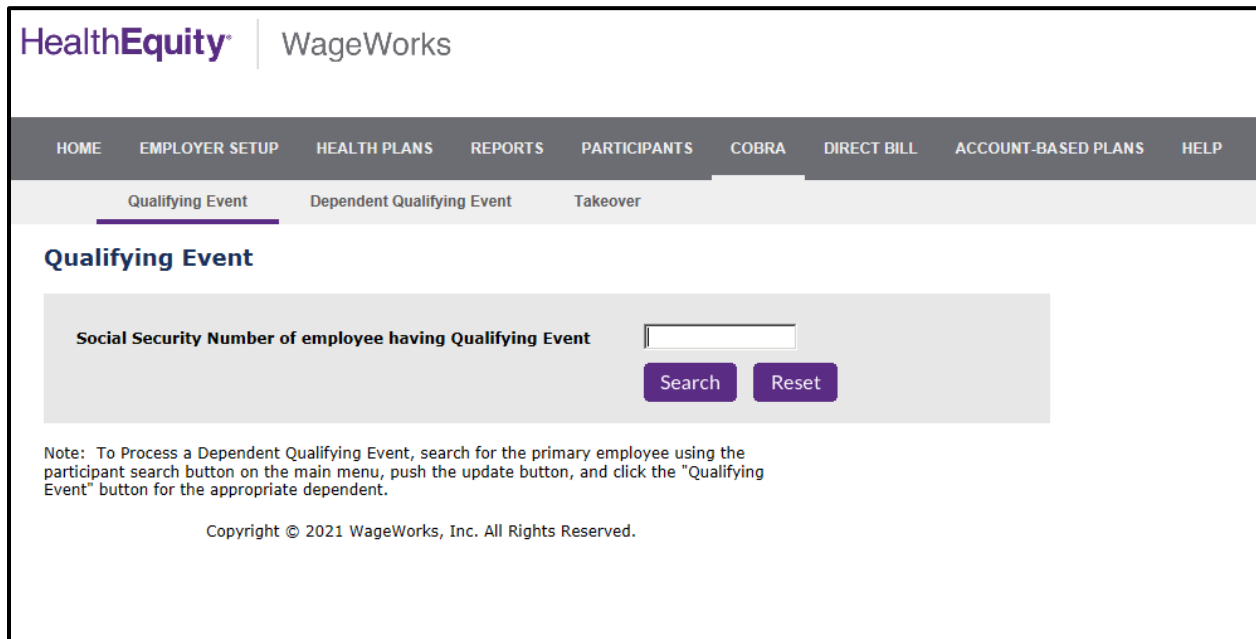
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- **Qualifying Event:** A qualifying event occurs when an employee, along with any of their eligible dependents at that time, lose coverage on a COBRA eligible plan and who should be sent a COBRA Election Notice.
- **Dependent Qualifying Event:** This occurs when a dependent loses coverage on a COBRA eligible plan and should be sent a COBRA Election Notice. The most common types of dependent qualifying events are:
 - Divorce / separation
 - Ineligibility of a dependent child
- **Takeover:** A takeover should be entered when a continuant that has previously elected coverage through a prior administrator should now be billed by HealthEquity/WageWorks (typically an acquired organization). The billing start date entered on this form determines when HealthEquity/WageWorks will begin billing and remitting premiums for this continuant.

Processing COBRA Events

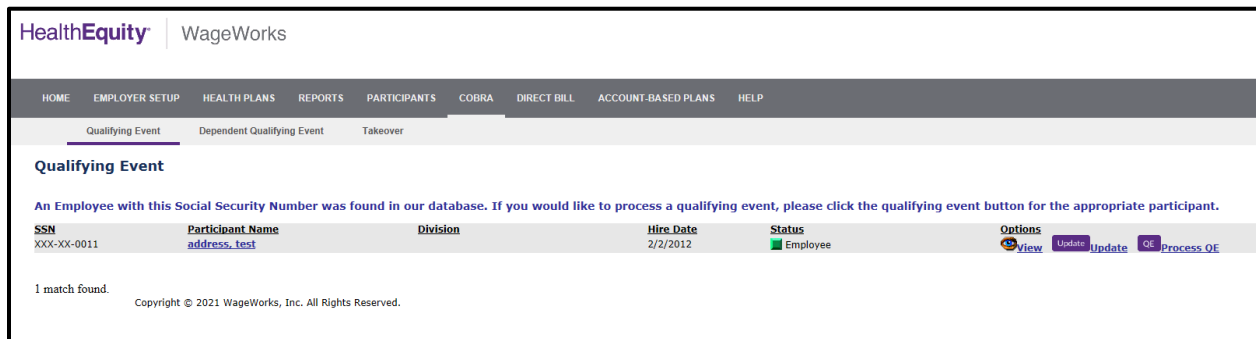
Qualifying Event

On the Qualifying Event page, you can enter a COBRA qualifying event as soon as the employer is notified. The plan sponsor can view and update participant setup information at the same time they are processing a qualifying event. Qualifying events that are submitted via the website are mailed the following business day.



To process a participant's qualifying event:

- Within the secure website, select the top menu option of **COBRA**
- Select **Qualifying Event**
- At the prompt enter the Social Security number for the participant



- When the participant information appears on the page, select **Process QE**.

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Qualifying Event
Dependent Qualifying Event
Takeover

Qualifying Event

[Employee Information](#)
[Dependents](#) [Add Dependents](#)
[Contact WageWorks about this participant.](#)

[Update Participant: SSN XXX-XX-0011](#)

First Name, MI, Last Name:	<input type="text" value="test"/> <input type="text" value="address"/>
Division / Location:	<input type="text" value=""/> <input type="button" value="v"/>
Employee Class:	<input type="text" value="Retiree HI >65"/> <input type="button" value="v"/>
Employee Number:	<input type="text" value=""/>
Birth Date:	<input type="text" value="1/1/1980"/>
Hire Date:	<input type="text" value="2/2/2012"/>
Address:	<input type="text" value="123 Main Street"/>
City, State, Zip:	<input type="text" value="Anywhere"/> <input type="button" value="x"/> <input type="text" value="TN"/> <input type="button" value="v"/> <input type="text" value="88888"/>
Phone Number:	<input type="text" value=""/>
Image Name:	<input type="text" value=""/>

[Employer-Specific Fields](#)

Benefit Group: *	<input type="text" value=""/>
Group Number: *	<input type="text" value=""/>
Sub-Group: *	<input type="text" value=""/>

[Process Qualifying Event](#)

Qualifying Event Date:	<input type="text" value=""/>
Qualifying Event Reason:	<input type="text" value="Please Select"/> <input type="button" value="v"/>
Election Notice Mailed Date:	<input type="text" value=""/>
Election Date:	<input type="text" value=""/>
Waiting Start Date:	<input type="text" value="2/2/2012"/>

[No Dependents found for this employee.](#)

[Add Dependents to test address : SSN XXX-XX-0011](#)

- Update any demographic information (if needed).
- Enter the qualifying event date and select the qualifying event reason from the drop-down menu.
- Add any covered dependents that are not listed and check the MED/DEN box for the dependent to be listed as a covered dependent.
- When finished with adding / updating all information on this screen, click **Next**.

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Search
View
Update
Add

Qualifying Event

[Additional Qualifying Event Information](#)

Severance Package: No Severance Package Offered ▼

[Coverage at time of Qualifying Event](#)

Add New Coverages

Plan	Coverage	<u>Individually Rated Price (if applicable)</u>	<u>Original Coverage Begin Date</u>	<u>Last Day of PreCOBRA Coverage</u>	Salary
Sample Plan	Not Selected ▼		4/1/2020	1/31/2021	

← Previous
Step 2 of 4
Next →

[Contact WageWorks about this participant.](#)

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- If your company is paying a portion of the COBRA premium, select a severance package (e.g., your company will pay a percentage of the qualified beneficiary’s monthly COBRA premium should he or she elect COBRA coverage) from the drop-down menu.
- Select the plan(s) in which the qualified beneficiary (QB) was enrolled at the time of the QE (i.e., the plan(s) on which he or she was enrolled the date before the QE) and subsequently lost due to the QE and the applicable coverage tier.
 - **Please note:** Individually Rated Price is a monthly premium amount. Usually, “individually rated price” indicates when a monthly applicable premium varies from one qualified beneficiary to another.
- Review the Original Coverage Begin and Last Day of Pre-COBRA Coverage fields for accuracy or update these as applicable.
 - **Please note:** These dates are generally be populated based upon your plan setup, although you have the option to override these fields if needed.
- When finished with adding / updating all information on this screen, click **Next**.

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Search
View
Update
Add

Qualifying Event

Please confirm your changes:

If you do not finish this transaction by pushing the finish button, your entries will be lost.

Notice: It is your responsibility to notify the appropriate carrier(s) of this coverage loss.

[Confirm Qualifying Event for John Smith :](#)

Qualifying Event Date: 1/21/2021

Qualifying Event Reason: Termination

Waiting Start Date: 1/1/2020

Severance Package: Severance Package not offered.

[Confirm Qualifying Event Coverage for John Smith](#)

Plan	Coverage	Rate Override (if applicable)	Original Coverage Begin Date	Last Day of PreCOBRA Coverage	Salary
Sample Plan	Employee Only	N/A	4/1/2020	1/31/2021	

← Previous
Step 3 of 4
Finish →

[Contact WageWorks about this participant.](#)

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- Confirm the QE date, reason and plan(s) affected.
- Enter any employer-paid severance package details here, if applicable.
- When finished reviewing / updating, click **Finished** to see your confirmation.
- When all the event information is validated, you can continue processing the qualifying event.
- Once the event is processed, a window will appear showing that the event has been processed.

Please note: A qualifying event should be entered upon termination. If a participant is already on COBRA when the contract goes into effect, he or she must be entered as a takeover continuant.

Dependent Qualifying Event

Before a qualifying event can be processed for a dependent, they must already be in the system as a dependent of the employee. If a dependent is not listed, they can be added by using the **Participant Update** feature.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS **COBRA** DIRECT BILL HELP

Qualifying Event **Dependent Qualifying Event** Takeover

Dependent Qualifying Event

[Option 1](#)

Social Security Number of Dependent:

Search Reset

OR

[Option 2](#)

Social Security Number of Primary Participant:

Search Reset

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To process a dependent qualifying event:

- Within the secure website, select the top menu option of **COBRA**.
- Select the **Dependent Qualifying Event** menu option and create search criteria for either the dependent or the employee's social security number.
- Once you locate your employee, select the **QE** option

HealthEquity | WageWorks Sample Client - Implementation USER: C

HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS **COBRA** DIRECT BILL HELP

Qualifying Event **Dependent Qualifying Event** Takeover

Dependent Qualifying Event

Dependents as of 2/18/2021

Primary Participant Name	Division	Dependent Name	SSN	Age	Options
Sample Person	Hourly Employees	Spouse Person	123-45-6780	25	

1 match found.

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Dependent Qualifying Event

[Confirm Information for dependent having Qualifying Event](#)

Dependent Social Security Number (required):	<input type="text" value="010-00-0100"/>
First Name, MI, Last Name:	<input type="text" value="Spouse"/> <input type="text" value="Person"/>
Division / Location:	<input type="text" value="Hourly Employees"/> <input type="button" value="v"/>
Birth Date:	<input type="text" value="2/22/1996"/>
Gender:	<input type="text" value="Female"/> <input type="button" value="v"/>
Address:	<input type="text" value="123 Main Street"/>
City,State,Zip:	<input type="text" value="Anytown"/> <input type="text" value="TX"/> <input type="text" value="75038"/>
Phone Number:	<input type="text"/>

[Process Qualifying Event for Spouse Person, Spouse of Sample Person](#)

Qualifying Event Date:	<input type="text"/>
Qualifying Event Reason:	<input type="text" value="Please Select"/> <input type="button" value="v"/>
Dependent Waiting Start Date:	<input type="text" value="1/1/2018"/>
Severance Package:	<input type="text" value="No Severance Package Offered"/> <input type="button" value="v"/>

[No Dependents found for this participant.](#)
[Add New Dependents to newly promoted dependent.](#)

Name: <input type="text"/> <input type="text" value="Person"/> SSN: <input type="text"/> DOB: <input type="text"/>
Gender: <input type="text" value="Male"/> <input type="button" value="v"/> Relation: <input type="text" value="Child"/> <input type="button" value="v"/> Student: <input type="checkbox"/> Covered?: <input type="checkbox"/>
Status: <input type="text" value="Active"/> <input type="button" value="v"/> Wait Start: <input type="text" value="1/1/2018"/> Cov. Start: <input type="text"/>

Name: <input type="text"/> <input type="text" value="Person"/> SSN: <input type="text"/> DOB: <input type="text"/>
Gender: <input type="text" value="Male"/> <input type="button" value="v"/> Relation: <input type="text" value="Child"/> <input type="button" value="v"/> Student: <input type="checkbox"/> Covered?: <input type="checkbox"/>
Status: <input type="text" value="Active"/> <input type="button" value="v"/> Wait Start: <input type="text" value="1/1/2018"/> Cov. Start: <input type="text"/>

Name: <input type="text"/> <input type="text" value="Person"/> SSN: <input type="text"/> DOB: <input type="text"/>
Gender: <input type="text" value="Male"/> <input type="button" value="v"/> Relation: <input type="text" value="Child"/> <input type="button" value="v"/> Student: <input type="checkbox"/> Covered?: <input type="checkbox"/>
Status: <input type="text" value="Active"/> <input type="button" value="v"/> Wait Start: <input type="text" value="1/1/2018"/> Cov. Start: <input type="text"/>

[Add Dependent](#)

Step 1 of 4

- Update any demographic information (if needed).
- Enter the qualifying event date and select the qualifying event reason from the drop-down menu.
- If your company is paying a portion of the COBRA premium, select a severance package (e.g., your company will pay a percentage of the qualified beneficiary's monthly COBRA premium should he or she elect COBRA coverage) from the drop-down menu.

Dependent Qualifying Event

Please confirm the dependent's coverage as of 1/1/2021.

Coverage at time of Qualifying Event

Add New Coverages

<u>Plan</u>	<u>Coverage</u>	<u>Individually Rated Price (if applicable)</u>	<u>Original Coverage Begin Date</u>	<u>Last Day of PreCOBRA Coverage</u>	<u>Salary</u>
DB - Co-Pay Plan Union ANC	Not Selected <input type="button" value="v"/>	<input type="text"/>	1/1/2018 <input type="text"/>	<input type="text"/>	
DB - HRA Plan Union ANC	Not Selected <input type="button" value="v"/>	<input type="text"/>	1/1/2018 <input type="text"/>	<input type="text"/>	
Sample Plan	Not Selected <input type="button" value="v"/>	<input type="text"/>	4/1/2018 <input type="text"/>	1/31/2021 <input type="text"/>	

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Step 2 of 4

Next →

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- Select the plan(s) in which the dependent was enrolled at the time of the QE (i.e., the plan(s) on which he or she was enrolled the date before the QE) and subsequently lost due to the QE and the applicable coverage tier.
 - **Please note:** Individually Rated Price is a monthly premium amount. Usually, “individually rated price” indicates when a monthly applicable premium varies from one qualified beneficiary to another.
- Review the Original Coverage Begin and Last Day of Pre-COBRA Coverage fields for accuracy or update these as applicable.
 - **Please note:** These dates are generally populated based upon your plan setup, although you have the option to override these fields if needed.
- When finished with adding / updating all information on this screen, click **Next**.

Dependent Qualifying Event

Please confirm your entries:

Notice: It is your responsibility to notify the appropriate carrier(s) of this coverage loss.

[Confirm New Participant](#)

Field	Value
Social Security Number	010-00-0100
Name	Spouse Person
Division or Location	Hourly Employees
Birth Date	2/22/1996
Gender	Female
Mailing Address	123 Main Street Anytown, TX 75038

[Confirm Qualifying Event for Spouse Person : 010-00-0100](#)

Qualifying Event Date:	1/1/2021
Qualifying Event Reason:	Divorce
Waiting Start Date:	1/1/2018
Severance Package:	Severance Package not offered.

[Confirm Qualifying Event Coverage for Spouse Person](#)

Plan	Coverage	Rate Override (if applicable)	Original Coverage Begin Date	Last Day of PreCOBRA Coverage	Salary
Sample Plan	Employee Only	N/A	4/1/2018	1/31/2021	

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Step 3 of 4
[Finish →](#)

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- Review and confirm the information including QE date, reason and plan(s) affected.
- When finished reviewing, click **Finish** to see your confirmation.
- Once the event is processed, a window will appear showing that the event has been processed.

Takeover

A takeover continuant should be entered when a participant is actively on COBRA or in the waiting period at the time HealthEquity/WageWorks takes over COBRA administration. A takeover continuant can only occur when HealthEquity/WageWorks first becomes the COBRA/HIPAA administrator or when a new division is added as part of a business reorganization that results in the merger or acquisition of a new division, affiliate or subsidiary. The billing start date will determine the date to begin billing the participant. If participants are within their 60-day waiting period when the contract goes into effect, they should be entered through the takeover continuant page when electing COBRA. The following is the procedure for setting up new takeover continuants.

The screenshot shows the HealthEquity WageWorks interface. At the top, the logo 'HealthEquity | WageWorks' is displayed. Below it is a navigation menu with options: HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, and HELP. Under the COBRA menu, there are three sub-options: Qualifying Event, Dependent Qualifying Event, and Takeover. The 'Takeover' option is selected and highlighted. The main content area is titled 'Takeover Continuant' and contains a form with the label 'Social Security Number of Takeover Continuant:'. There is a text input field, a 'Search' button, and a 'Reset' button. Below the form, there is a note: 'If these terminated employees elect COBRA, then you should at that time return to this screen and enter them as takeover continuants.' At the bottom, the copyright notice reads: 'Copyright © 2021 WageWorks, Inc. All Rights Reserved.'

To process a COBRA takeover:

- Within the secure website, select the top menu option of **COBRA**.
- Select the **Takeover** option.
- Enter the new employee's Social Security number, and the system will search for an existing Social Security number. If none appears, you will need to complete the form.

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Qualifying Event
Dependent Qualifying Event
Takeover

Takeover Continuant

[Employee Information](#)

Social Security Number:

First Name, MI, Last Name:

Division / Location:

Employee Number: *

Birth Date:

Hire Date:

Gender:

Address:

City, State, Zip:

Phone Number:

Email Address: *

Image Name: *

* Indicates an optional field

[Process Qualifying Event](#)

Qualifying Event Date:

Qualifying Event Reason:

Billing Start Date: (Date when WageWorks will take over billing this participant)

[Add Dependents](#)

Name: **SSN:** **DOB:**

Gender: **Relation:** **Student:** **Covered?:**

Status: **Wait Start:** **Cov. Start:**

Name: **SSN:** **DOB:**

Gender: **Relation:** **Student:** **Covered?:**

Status: **Wait Start:** **Cov. Start:**

- Complete all fields and when done, click **Next**.
- Enter the qualifying event date and select the qualifying event reason from the drop-down menu.
- Enter the billing start date as this will be used as the first billing month in which HealthEquity/WageWorks will send out payment coupons for COBRA coverage.
- Add any covered dependents that are not listed and check the MED/DEN box for the dependent to be listed as a covered dependent.
- When finished with adding / updating all information on this screen, click **Next**.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL HELP

Qualifying Event Dependent Qualifying Event **Takeover**

Takeover Continuant

[Additional Qualifying Event Information](#)

Severance Package:

[Coverage at time of WageWorks Continuant Takeover:](#)

Add New Coverages

Plan	Coverage	Individually Rated Price (if applicable)	Original Coverage Begin Date	Last Day of PreCOBRA Coverage
Sample Plan	<input type="text" value="Not Selected"/>		<input type="text" value="4/1/2000"/>	<input type="text" value="5/31/2020"/>

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[Contact WageWorks about this participant.](#)
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- If your company is paying a portion of the COBRA premium, select a severance package (e.g., your company will pay a percentage of the qualified beneficiary’s monthly COBRA premium should he or she elect COBRA coverage) from the drop-down menu.
- Select the plan(s) in which the qualified beneficiary (QB) was enrolled at the time of the QE (i.e., the plan(s) on which he or she was enrolled the date before the QE) and subsequently lost due to the QE and the applicable coverage tier.
 - **Please note:** Individually Rated Price is a monthly premium amount. Usually, “individually rated price” indicates when a monthly applicable premium varies from one qualified beneficiary to another.
- Review the Original Coverage Begin and Last Day of Pre-COBRA Coverage fields for accuracy or update these as applicable.
 - **Please note:** These dates are generally be populated based upon your plan setup, although you have the option to override these fields if needed.
- When finished with adding / updating all information on this screen, click **Next**.

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Qualifying Event
Dependent Qualifying Event
Takeover

Takeover Continuant

Confirm New Employee / WageWorks Continuant Takeover:

If you do not finish this transaction by pushing the finish button, your entries will be lost.

[Confirm New Participant](#)

Field	Value
Social Security Number	999-88-9990
Name	Sample Takeover
Division or Location	Salaried Employees
Employee Number	
Birth Date	01/01/1961
Hire Date	01/01/2000
Gender	Male
Email Address	
Mailing Address	123 Streeter Anytown, TX 98765

[Confirm Qualifying Event and Takeover for Sample Takeover : 999-88-9990](#)

Qualifying Event Date:	05/01/2020
Qualifying Event Reason:	Termination
WageWorks Billing Start Date:	2/1/2021
Severance Package:	Severance Package not offered.

[Confirm Coverage at time of Takeover for Sample Takeover](#)

Plan	Coverage	Rate Override (if applicable)	Original Coverage Begin Date	Last Day of PreCOBRA Coverage
Sample Plan	Employee Only	N/A	4/1/2000	5/31/2020

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Finish →

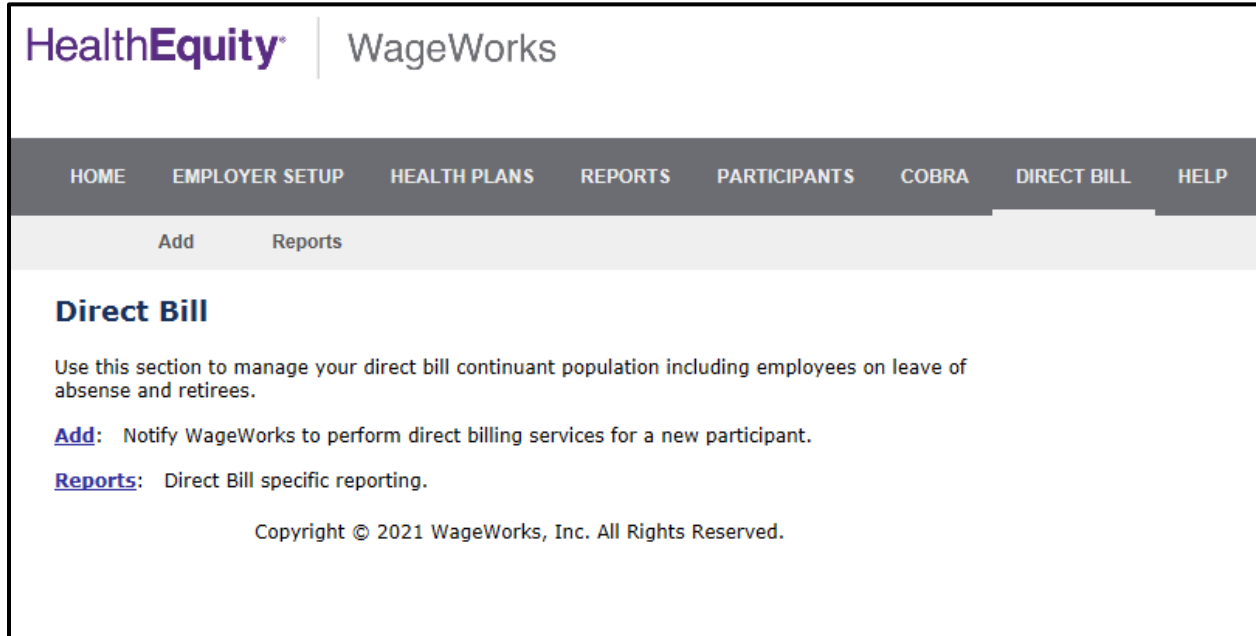
[Contact WageWorks about this participant.](#)

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- Review the entered information.
- When finished reviewing / updating, click **Finish** to see your confirmation.
- Once the event is processed, a window will appear showing that the participant has been successfully processed.

SECTION 8 – DIRECT BILL

The Direct Bill section is used to manage the employer's Direct Bill continuant population including retirees and continuants on leave of absence.



The available Direct Bill options are:

- **Add** – Enter the Direct Bill continuant information to notify HealthEquity about direct billing services for a new participant.
- **Reports** – These are specific reports for the Direct Bill population, including:
 - **Past Due Report** – This report notifies you of Direct Bill participants that are past due and gives you the option of canceling them from the plan.
 - **Direct Bill Participant with Impending Medicare Eligibility** – This report notifies you when you have participants who are approaching Medicare eligibility.

Processing Direct Bill Participants

To add a new Direct Bill participant:

- Within the secure website, select the top menu option of **Direct Bill**.
- Select the **Add** option.
- Enter the new employee's Social Security number, and the system will search for an existing Social Security number. If none appears, you will need to complete the form.

The screenshot shows the HealthEquity WageWorks interface. At the top left is the HealthEquity logo, followed by the WageWorks logo. Below this is a navigation bar with the following options: HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, and HELP. Under the DIRECT BILL menu, there are two sub-options: Add and Reports. The Add option is currently selected. The main content area is titled "Direct Bill Add" and contains a form with the following elements: a label "Social Security Number of Direct Billing Participant:", an input field for the Social Security number, a "Search" button, and a "Reset" button. At the bottom of the form area, there is a copyright notice: "Copyright © 2021 WageWorks, Inc. All Rights Reserved."

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Add
Reports

Direct Bill Add

[Employee Information](#)

Social Security Number:

First Name, MI, Last Name:

Division / Location:

Employee Number:

Birth Date:

Hire Date:

Gender:

Address:

City, State, Zip:

[Process Qualifying Event](#)

Direct Bill Type:

Billing Start Date: (Date when WageWorks will take over billing this participant)

Direct Bill End Date: (Date when coverage will end)

Severance Package:

[Add Dependents](#)

Name: **SSN:** **DOB:**

Gender: **Relation:** **Student:** **Covered?:**

Status: **Wait Start:** **Cov. Start:**

Name: **SSN:** **DOB:**

Gender: **Relation:** **Student:** **Covered?:**

Status: **Wait Start:** **Cov. Start:**

Name: **SSN:** **DOB:**

Gender: **Relation:** **Student:** **Covered?:**

Status: **Wait Start:** **Cov. Start:**

[Add Dependent](#)

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Step 1 of 4
Next →

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- Add all personal and demographic information.
- Enter the direct bill type from the drop-down menu, the start date and end date.
- If your company is paying a portion of the premium, select a severance package (e.g., your company will pay a percentage of the qualified beneficiary’s monthly premium should he or she elect coverage) from the drop-down menu.
- Add any covered dependents that are not listed and check the MED/DEN box for the dependent to be listed as a covered dependent.
- When finished adding information on this screen, click **Next**.

HealthEquity WageWorks

HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL HELP

Add Reports

Direct Bill Add

[Coverage at time of Qualifying Event](#)

Add New Coverages

Plan	Coverage	Individually Rated Price (if applicable)	Coverage Begin Date	Salary
DB - Co-Pay Plan Union ANC	Not Selected		2/1/2021	
DB - HRA Plan Union ANC	Not Selected		2/1/2021	

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[Contact WageWorks about this participant.](#)
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- Select the plan(s) in which the participant was enrolled at the time of the event (i.e., the plan(s) on which he or she was enrolled the date before the event) and subsequently lost due to the event and the applicable coverage tier.
 - **Please note:** Individually Rated Price is a monthly premium amount. Usually, “individually rated price” indicates when a monthly applicable premium varies from one qualified beneficiary to another.
- Review the Coverage Begin Date for accuracy or update as applicable.
 - **Please note:** These dates are generally populated based upon your plan setup, although you have the option to override these fields if needed.
- When finished adding / updating all information on this screen, click **Next**.

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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL HELP

Add Reports

Direct Bill Add

Confirm Direct Billing New Participant:

If you do not finish this transaction by pushing the finish button, your entries will be lost.

[Confirm New Participant](#)

Field	Value
Social Security Number	987-65-4123
Name	Direct B Testing
Division or Location	Salaried Employees
Employee Number	
Birth Date	01/01/1945
Hire Date	01/01/1990
Gender	Male
Mailing Address	123 Main Street Any Town, TX 75038

[Confirm Direct Billing for Direct Testing : 987-65-4123](#)

Direct Billing Type:	Retiree Direct Bill
WageWorks Billing Start Date:	2/1/2021
Eligibility End Date:	
Severance Package:	Severance Package not offered.

[Confirm Coverage at time of Direct Billing Takeover for Direct Testing](#)

Plan	Coverage	Rate Override (if applicable)	Coverage Begin Date	Price + Admin Fee	Salary
DB - Co-Pay Plan Union ANC	Employee Only	\$367.40	2/1/2021	\$367.40	

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Step 3 of 4
Finish →

[Contact WageWorks about this participant.](#)

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- Review and confirm all of the information including start dates, direct bill type and affected plan(s).
- When finished reviewing / updating, click **Finished** to see your confirmation.
- Once the information is processed, a window will appear showing that the participant information is in the system.

SECTION 9 – CASES

Cases are a way to communicate with HealthEquity/WageWorks and your Service Delivery Management team. Cases can be added at both a client level and a participant level. These can be used to ask a question about a specific item or concern that you may have.

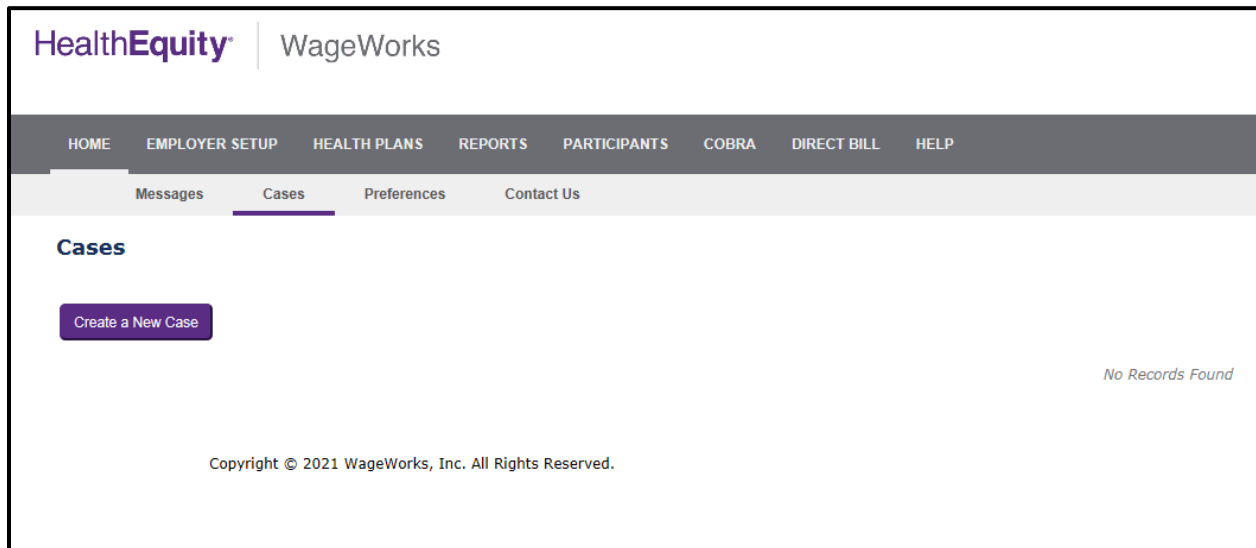
Cases are logged into the applicable account and your Service Delivery Management team will respond to the case(s).

Creating a Web Case

Client Level

To add a new case at the client level:

- Within the main client home page, select the **Case** option.
- Select the **Create a New Case** option.



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HOME EMPLOYER SETUP HEALTH PLANS REPORTS PARTICIPANTS COBRA DIRECT BILL HELP

Messages **Cases** Preferences Contact Us

How Can We Help You?

Request

What can we help you with today?

How would you categorize your question?

Details

Please share relevant details regarding your question or request. Please avoid entering any personally identifiable or protected health information, such as Social Security Number or medical diagnosis.

Request Details

[Proceed to Submit Request](#)

- Under the Request section
 - “What can we help you with today” – Select the product
 - “How would you categorize your question?” – Select the category that best fits your inquiry
- Under the Details section
 - Share the details of your request or inquiry.
 - Click **Proceed to Submit Request**. You’ll receive an email confirmation once your case is updated.
- You will then have option to upload documents, if applicable
 - Click Browse to upload and select the document you would like to attach
 - Click **Submit Request** (even if you do not upload documents)
- You will receive a Case Number for reference and can go back to “Home” then “Cases” to check the status of your inquiry

Participant Level

To add a new case at the participant level:

- Within the website, select the **Participant** option.
- Search for a participant's record by Social Security number, name, account number, etc.
- Once you've located a participant's record, click **View** or **Update**.

The screenshot shows the HealthEquity WageWorks interface. At the top, there is a navigation bar with links for HOME, EMPLOYER SETUP, HEALTH PLANS, REPORTS, PARTICIPANTS, COBRA, DIRECT BILL, and HELP. Below this is a sub-navigation bar with Search, View, Update, and Add. The main content area is titled "Search Results" and shows a search for "Jean". The results table has columns for SSN, Participant Name, Division, Hire Date, Status, and Options. One result is shown for Jean, Norma, with SSN 222-11-3333, Division Hourly Employees, Hire Date 1/1/2000, and Status Direct Bill Participant. The Options column contains links for View, Update, and Rehire. Below the table, it says "1 match found." and "Copyright © 2021 WageWorks, Inc. All Rights Reserved."

SSN	Participant Name	Division	Hire Date	Status	Options
222-11-3333	Jean, Norma	Hourly Employees	1/1/2000	Direct Bill Participant	View Update Rehire

- Scroll to the bottom of the participant record and click **Contact WageWorks about this participant**.

The screenshot shows the bottom section of a participant record. It contains three buttons: "Contact WageWorks about this participant", "Switch to Update Mode", and "Queue ACH Signup Form". Below the buttons, it says "Copyright © 2021 WageWorks, Inc. All Rights Reserved."

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Search
View
Update
Add

How Can We Help You?

Request

*What can we help you with today?

*How would you categorize your question?

Details

Please share relevant details regarding your question or request. Please avoid entering any personally identifiable or protected health information, such as Social Security Number or medical diagnosis.

*Request Details

- Under the Request section
 - “What can we help you with today” – Select the product
 - “How would you categorize your question?” – Select the category that best fits your inquiry
- Under the Details section
 - Share the details of your request or inquiry.
 - Click **Proceed to Submit Request**. You’ll receive an email confirmation once your case is updated.
- You will then have option to upload documents, if applicable
 - Click Browse to upload and select the document you would like to attach
 - Click **Submit Request** (even if you do not upload documents)
- You will receive a Case Number for reference and can go back to “Home” then “Cases” to check the status of your inquiry