



HealthEquity | WageWorks Profile & Enrollment Instructions

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Entering Profile Records for your Participants

- Access the Participants Tab
- Click on the Add Eligible/Participant link found in the top right corner.

DASHBOARD PARTICIPANTS REPORTS FILES BENEFITS COMPANY COMMUNICATIONS GATEWAY EMPLOYER PARKING EMPLOYER TRAVEL

SEARCH EXPERIENCE OPTIONS PPT SITE MESSAGES PPT SITE FORMS & DOCS

PARTICIPANT SEARCH

Enter search criteria to view or edit an employee/participant's record.

Last Name: First Name: ID Code: Program Sponsor: Unique ID: Benefit Group: Payroll Group: Company Code: Location Code:

System EE ID: Participant / EE ID: All All All All All

Click here to run this report for a particular Benefit Group, Payroll Group, Location Code or Company Code.

SEARCH CLEAR

Add Eligible / Participant
Enter employee ID/Screen

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

Auto Save Feature

The following pages have an auto save feature that will automatically save as you enter data.

If you get logged out – a security precaution for inactivity – you will return to this page in progress immediately when you log back in (as long as you access this site from the same device and have not updated the cookie feature in that device's browser settings).

Don't Forget to Save!

Be sure to click one of the "Save" buttons when you are done to officially save the information you entered to the system. Until then, the information you entered will only be saved to this page and the participant will not yet be eligible or enrolled.

OK

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 as follows:

- Participant or Employee ID: [Text Input]
- Unique ID or SSN: * [Text Input]
- Last Name: * [Text Input]
- First Name: * [Text Input]
- Middle Initial: [Text Input]
- Birth Date: * [Month] [Day] [Year] (Month, Day, and Year are dropdown menus)
- Gender: [Radio] Unknown [Radio] Male [Radio] Female
- Mailing Address 1: * [Text Input]
- Mailing Address 2: [Text Input]
- City: * [Text Input]
- State: * [Dropdown Menu]
- Zip Code: * [Text Input] - [Text Input] Ext.(Optional)
- Work Address 1: [Text Input]
- Work Address 2: [Text Input]
- Work City: [Text Input]
- Work State: [Dropdown Menu]
- Work Zip Code: [Text Input]
- Participant Updates Address: [Checkbox]
- Email 1: [Text Input]
- Phone: [Area] - [Prefix] - [Line] X [Ext.(Optional)]
- Employment Hire Date: * [Text Input] (MM/DD/YYYY)
- Employment Termination Date: [Text Input] (MM/DD/YYYY)
- Benefit Group Code: * [Radio] ACTIVE
- Benefit Group Effective Date: * [Text Input] (MM/DD/YYYY)
- Payroll Group Code: * [Radio] NONE
- Payroll Group Effective Date: * [Text Input] (MM/DD/YYYY)
- Location Code: [Text Input]
- Company Code: [Text Input]
- Commuter Benefit Group Code: [Radio] Y [Radio] N

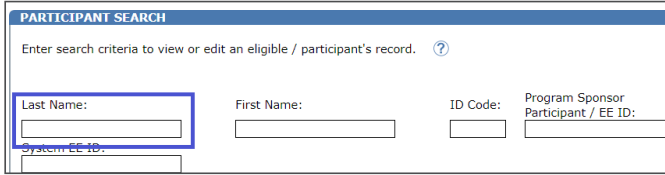
At the bottom right of the form are two buttons: "NEXT" and "CANCEL".

Entering Enrollments for your participants (FSA):

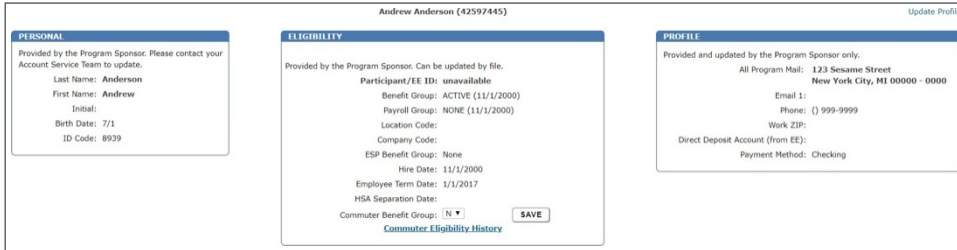
- Log into the HealthEquity | WageWorks Employer Site, then click on the Participants tab



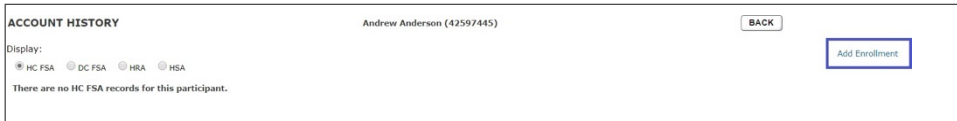
- This will bring you to the Participant Search page (**you should have already entered the profile records)



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



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

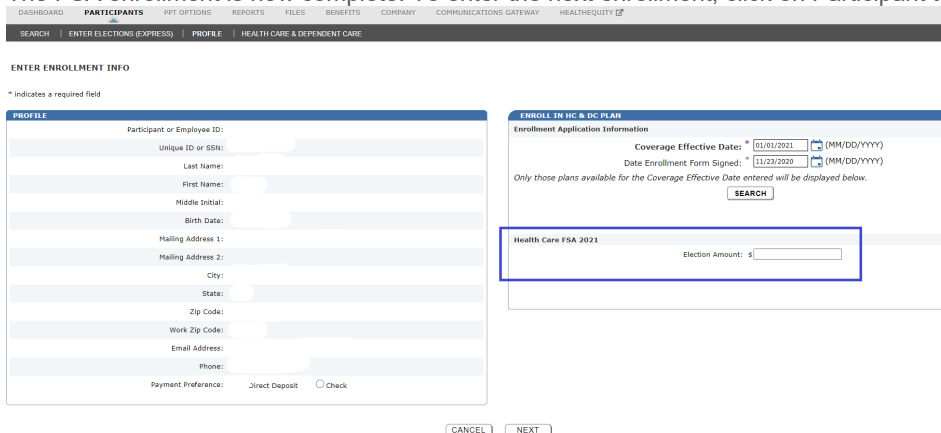


page

- 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 click Search.



- 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 click 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 click Save Enrollment at the bottom of the page.
- The FSA enrollment is now complete. To enter the next enrollment, click on Participant tab in the toolbar.



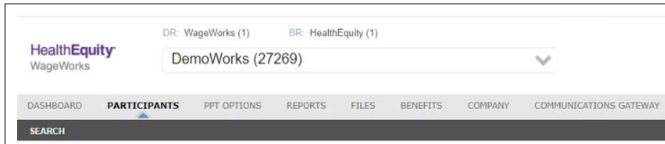
Entering Enrollments for your participants (FSA):

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:

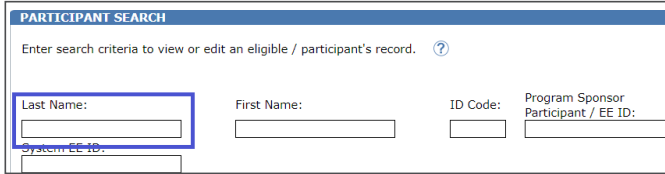
- From the HealthEquity | WageWorks Employer Site, click on the Reports tab in the toolbar
- Once there click on HC & DC in the blue toolbar
- Then you will be presented with a list of available reports. Click on Enrollment
- For the purposes of verifying, the enrollments do not change the As of Date field. Leave all fields as they are at this time. Scroll down and click on Generate Report. You will be presented with a Generate Report Options box, just click on OK at the bottom
- Now click on Pick Up in the toolbar on the left-hand side
- You will see the report here and click on it. The report will remain here for 96 hours. After that time, it will be deleted.
- Once you click on 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):

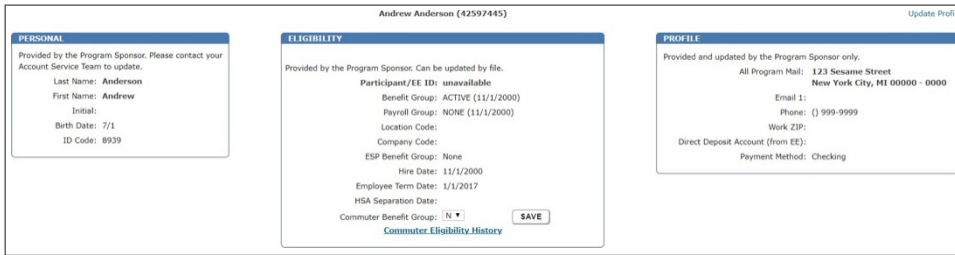
- Log into the HealthEquity | WageWorks Employer Site, then click on the Participants tab



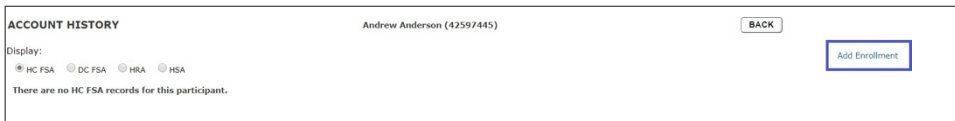
- This will bring you to the Participant Search page (**you should have already entered the profile records)



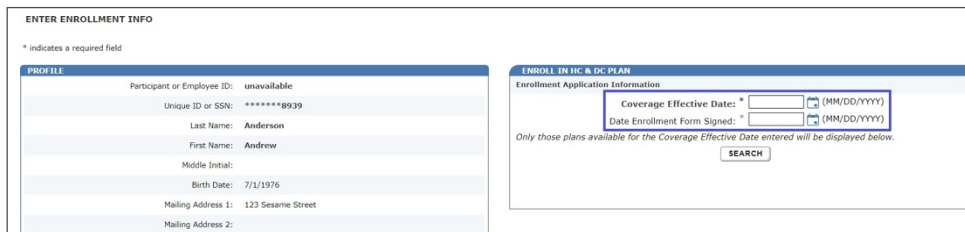
- In the last name field, enter the first few letters of a participants last name, then click Search
- When the participants name comes up at the bottom of the page, click on the last name
- This will bring you to the participants Profile Page



- From here you will click on Healthcare & Dependent Care on the toolbar
- This will bring you to the Account History page, where you will click on 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 click 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 clicking on the drop down. Scroll down and click 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 click Save Enrollment at the bottom of the page.
- If you have selected a coverage tier of more than single, then you will now be prompted 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 click on Save at the bottom of the page. If you have additional dependents to enter you will click on 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, click on the Participant tab in the toolbar

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

- First Name: *
- Last Name: *
- Unique ID:
- Relationship: *
- Date Of Birth: * (MM/DD/YYYY)
- Student Status: *
- Coverage Start Date: * (MM/DD/YYYY)
- Coverage End Date: (MM/DD/YYYY)

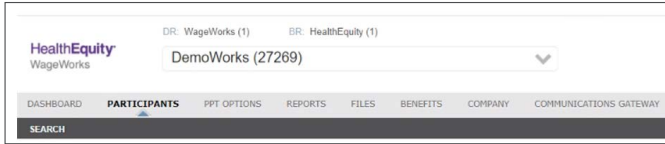
Buttons: SAVE, CANCEL

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:

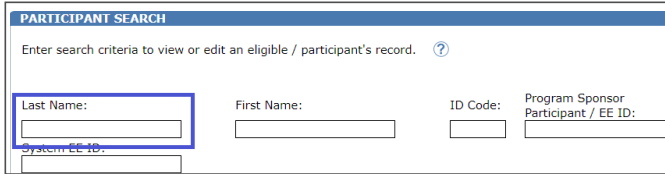
- From the HealthEquity | WageWorks Employer Site, click on the Reports tab in the toolbar
- Once there click on HC & DC in the blue toolbar
- Then you will be presented with a list of available reports. Click on Enrollment
- For the purposes of verifying, the enrollments do not change the As of Date field. Leave all fields as they are at this time. Scroll down and click on Generate Report. You will be presented with a Generate Report Options box, just click on OK at the bottom
- Now click on Pick Up in the toolbar on the left-hand side
- You will see the report here and click on it. The report will remain here for 96 hours. After that time, it will be deleted.
- Once you click on 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 into the HealthEquity | WageWorks Employer Site, then click on the Participants tab



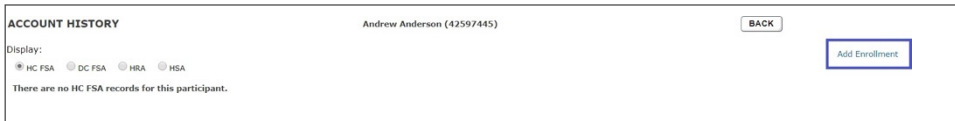
- This will bring you to the Participant Search page (**you should have already entered the profile records)



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



- From here you will click on Healthcare & Dependent Care on the toolbar
- This will bring you to the Account History page, where you will click on 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 click 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 clicking on the drop down. Scroll down and click 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 click Save Enrollment at the bottom of the page.
- If you have selected a coverage tier of more than single, then you will now be prompted 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 click on Save at the bottom of the page. If you have additional dependents to enter you will click on 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, click on 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 date input field and the format "(MM/DD/YYYY)"; "Student Status:" with a dropdown menu; "Coverage Start Date: *" with a date input field and the format "(MM/DD/YYYY)"; and "Coverage End Date:" with a date input field and the format "(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, click on the Reports tab in the toolbar
- Once there click on HC & DC in the blue toolbar
- Then you will be presented with a list of available reports. Click on 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 click on Generate Report. You will be presented with a Generate Report Options box, just click on OK at the bottom
- Now click on Pick Up in the toolbar on the left-hand side
- You will see the report here and click on it. The report will remain here for 96 hours. After that time, it will be deleted.
- Once you click on 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.

HSA Enrollments Steps:

Log into the HealthEquity | WageWorks Employer Site, then click on the Participants tab in the toolbar at the top of the page. Then follow the instructions below to enter the enrollments for your HSA participants (you should have already entered the profile records):

- Click on the Participant tab in the toolbar, you will be presented with the Participant Search page

- From the Participant Search page, enter the first few letters of the participants last name in the last name field, then click Search
- Click on the participants last name when it pops up, you will be presented with the Profile Page for the participant

- From the Profile Page, click on Health Care & Dependent Care in the blue toolbar, you will then be presented with the Account History page. From here you will click on Healthcare & Dependent Care on the toolbar
- This will bring you to the Account History page, where you will click on Add Enrollment on the right-hand side of the page

- On the Account History page, click on Add Enrollment on the right-hand side of the page, you will then be presented with the Enter Enrollment Info Page
- In the Coverage Effective Date field, enter the first date of the plan year
- In the Date Enrollment Form Signed, enter either the date the enrollment form was signed or the date you are entering the enrollment. Then click Search. You will be presented with the benefit plans that your group offers through WageWorks that the participant is eligible for.

HSA Enrollments Steps:

- Enter the annual election amount in the Election Amount field for participant. If they have not elected the benefit, leave the field blank (do not enter 0). For the HSA enrollment, you will enter 0.00 in the annual election amount in the Election Amount Field, and then populate the birth date of the participant. Once complete, scroll down to the bottom of the page and click Next. You will be presented with the information you just entered for review. Once reviewed scroll to the bottom of the page and click Save Enrollment. You will be presented with the Account History page. (Once the participants have completed the CIP process, you can then upload the funding file.)

- On the Account History Page, click on the HSA radio button. You will then be presented with the Account History Page for the participants HSA account.

To enter the next participant enrollment, click on the Participant tab in the toolbar and follow the directions above

To complete enrollment click the “Finish Opening Your HSA” button to launch the HSA application.

