

To help you familiarize yourself with the Employer Portal system interface, we've developed this reference guide to help navigate the system.

This guide explains how to access the following screens within the employer portal system:

- View Employee Demographics
- View Dependent Demographics
- View Account Balances and Transaction History
- View Debit Card Status (if applicable to your plan)
- View Reimbursement Method
- Request Reports
- View and/or Download Requested Reports

Log-In Instructions

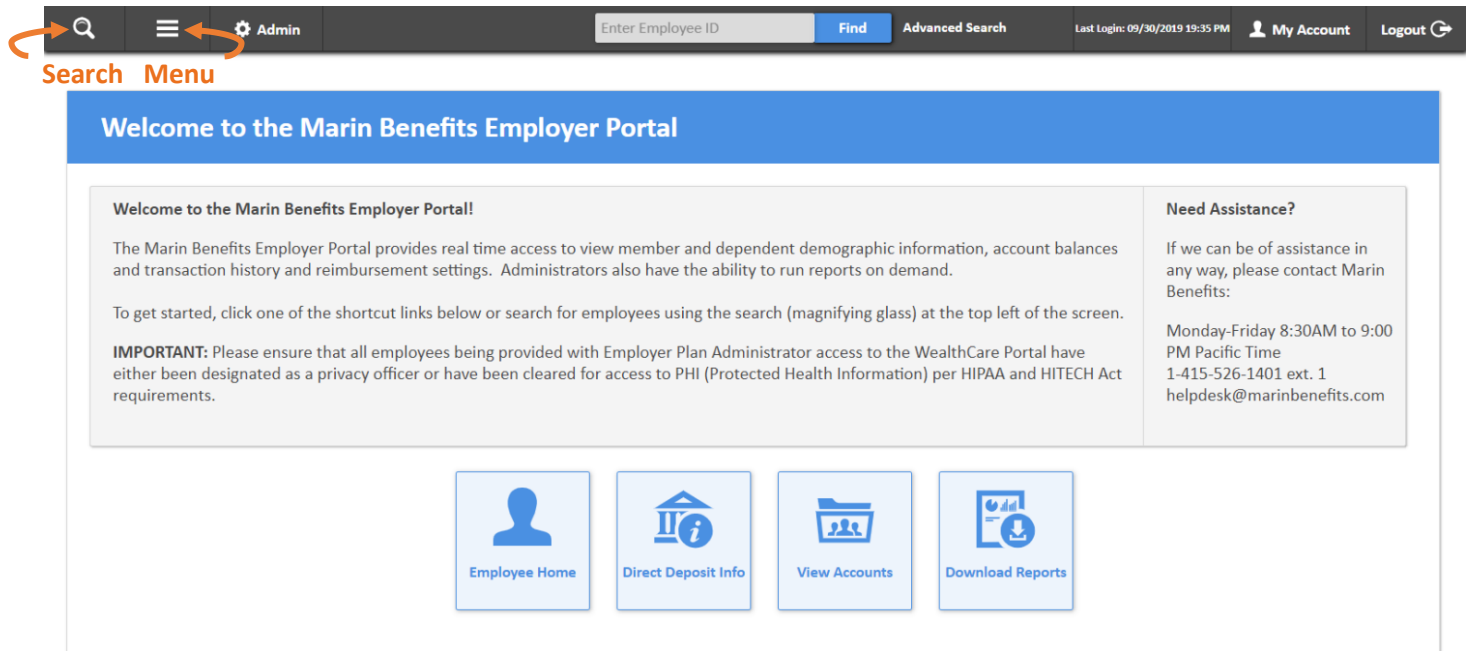
To access the Marin Benefits Employer Web Portal, navigate to wealthcareadmin.com and select **Employer**. Use the credentials provided by Marin Benefits to access your account. Please note that you may be prompted to change your password upon your first login-in.



Employer

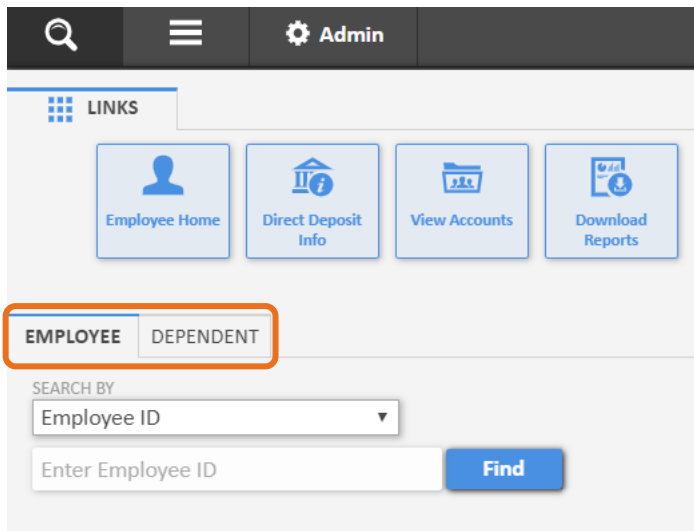
View company and employee accounts

Marin Benefits Employer Portal Homepage



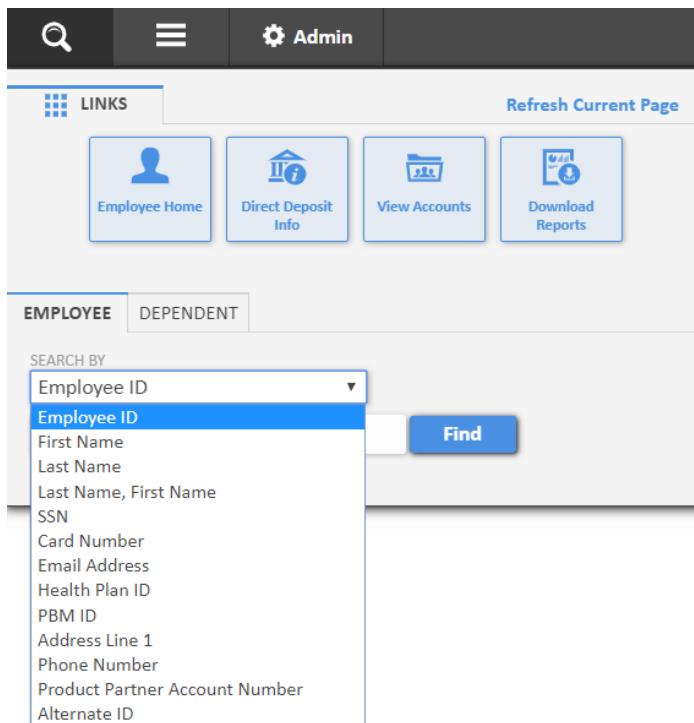
The screenshot shows the top navigation bar with a search icon, a menu icon, an 'Admin' gear icon, an 'Enter Employee ID' input field, a 'Find' button, an 'Advanced Search' link, a 'Last Login: 09/30/2019 19:35 PM' status, a 'My Account' link, and a 'Logout' button. Below the navigation bar is a blue header with the text 'Welcome to the Marin Benefits Employer Portal'. The main content area is divided into two columns. The left column contains a welcome message, a description of the portal's capabilities, and a list of shortcut links: 'Employee Home', 'Direct Deposit Info', 'View Accounts', and 'Download Reports'. The right column contains a 'Need Assistance?' section with contact information for Marin Benefits, including a phone number and email address.

How to do a Quick Search for an Employee or a Dependent

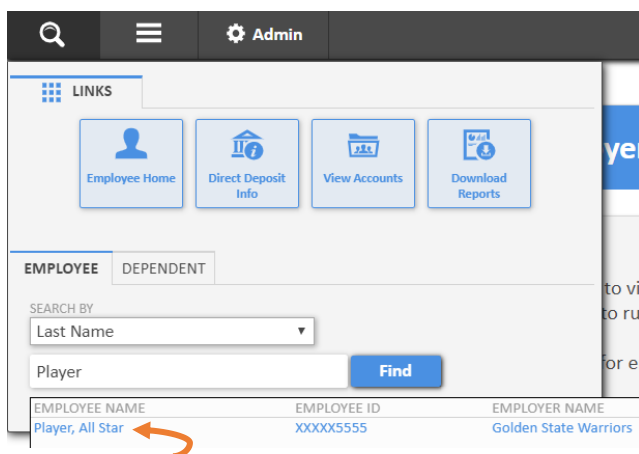


Once you are logged in to the Employer portal, you can search for an employee using the quick search feature, located in the top ribbon bar. Select the **magnifying glass** in the upper left corner of the ribbon bar. Clicking will expand the navigator tool, as shown on the left.

To search for an **Employee** you must be on the employee tab. To search for a **Dependent** you must be on the dependent tab.



You may search for employees and dependents using all supported search methods, as shown on the left. Marin Benefits suggest searching by **Last Name**.



Select an employee by clicking directly on the **Name** of the employee or dependent you would like view

EMPLOYEE DEPENDENT

SEARCH BY
Last Name

Player Find

EMPLOYEE NAME	EMPLOYEE ID	STATUS
Player, All Star	XXXXX5555	Active
PRIMARY CARD#	SSN#	DOB
XXXX-XXXX-XXXX-0665	XXX-XX-6789	1/1/1988
BILLING ADDRESS	DEPENDENTS	
Oracle Arena 7000 Coliseum Way Oakland, CA 94621	Yes	
EMPLOYER NAME	EMPLOYER ID	STATUS
Golden State Warriors	MBIGSW	Active

After selecting an employee their details will display.

Click on the **Name** of the employee to be taken directly to the employee's homepage.

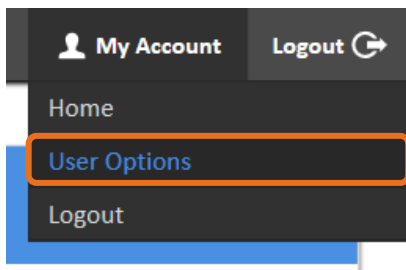
Click on the **Address** to be taken directly to the employee's demographic information.

Click on **Dependents** to view associated dependent(s) information.

If the employer offers a debit card, click on **Primary Card #** to view debit card information.

Helpful Portal Tip: Change the default search method to search by Last Name

Navigate to **My Account** on the upper righthand corner of the Homepage and select **User Options**. At the bottom of the User Options page, change Employee default search criteria to **Last Name** and hit **Save**.



WCA Navigator Options

Shortcut link placement: Top Bottom

Always default to search all Employers:

Employee default search criteria:

Save Cancel

field is required.

- Employee ID
- First Name
- Last Name
- Last Name, First Name
- SSN
- Card Number
- Email Address
- Health Plan ID
- PBM ID
- Address Line 1
- Phone Number
- Product Partner Account Number
- Alternate ID

How to Use the Main Menu

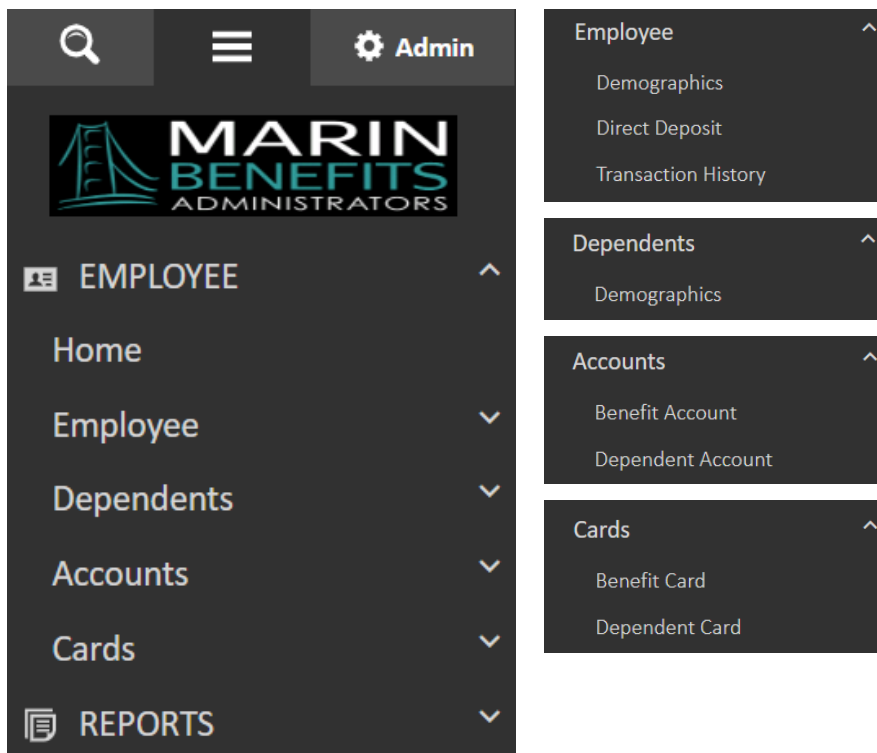
The main menu is a three-tiered menu and contains the pages used most commonly by administrators. In the main menu you can navigate to view **Employee** related information including employee demographic information, dependent demographic information, direct deposit account information, account balances and transaction history, as well as debit card information (if applicable). You may also run important **Reports** on demand.



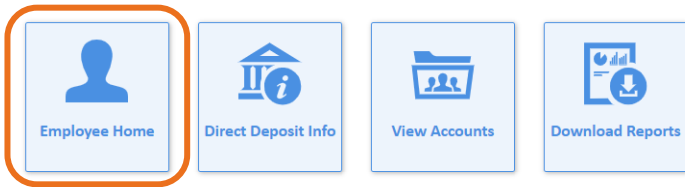
Menu

Employee Main Menu Content

The employee main menu option provides access to all pertinent employee-related content.



How to View Employee Benefit Accounts and Plan Balance



Navigate to **Benefit Account** under the Accounts tab, or select the **View Accounts** quick access navigation tile from the homepage. From here you can see an employee's annual election, disbursements and their available balance.

EMPLOYEE / Accounts

Benefit Accounts

There are no plans available to be added.

Please find the employee

Employee ID:

Player, All Star		DETAILS	DEPENDENTS	NOTES
EMPLOYEE ID XXXXX5555	ADMINISTRATOR Marin Benefits, Inc.	EMPLOYER Golden State Warriors	EMPLOYER ID MBIGSW	STATUS Active
STATUS Active	ELIGIBILITY DATE 1/1/2015	TERMINATION DATE	USER ID stephcurry1	REIMBURSEMENT METHOD Check
Home	Demographics	Accounts	Cards	History

The employee elected the following flex accounts. Click the Account Type to edit the account. To delete, select the account by clicking the checkbox next to it and click the DELETE button

Plan Year:

Accounts

<input type="checkbox"/>	Type	Plan Date	PlanId	Annual Election	Contrib YTD	Other Deposits	Disb YTD	Avail Bal	Auth	Disb. Bal	Balance Due	Status
<input type="checkbox"/>	HRA	Start: 1/1/2017 End: 12/31/2020	2017HRA	\$1,000.00	\$0.00	\$0.00	\$527.05	\$472.95	\$0.00	\$472.95	\$0.00	Active
<input type="checkbox"/>	HCA	Start: 1/1/2016 End: 12/31/2016	GSWHRA16	\$1,500.00	\$0.00	\$0.00	\$150.00	\$1,350.00	\$0.00	\$1,350.00	\$0.00	Active
<input type="checkbox"/>	HCA	Start: 1/1/2015 End: 12/31/2015	GSWHRA	\$1,500.00	\$0.00	\$0.00	\$75.00	\$1,425.00	\$0.00	\$1,425.00	\$0.00	Active
Balance Due Total											\$0.00	3 accounts found.

How to View Transaction History

Navigate to **Transaction History** under the Employee tab.

Change the **Service Start Date** and/or any other desired search parameters and select **Search**.

Service Start Date From:

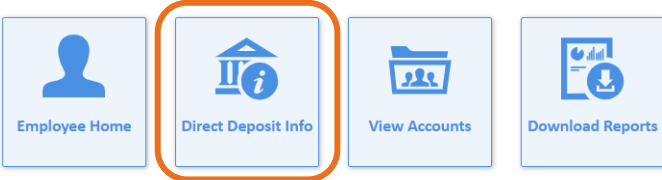
Service Start Date To:

A listing of all transactions for the employee and associated dependents will populate.

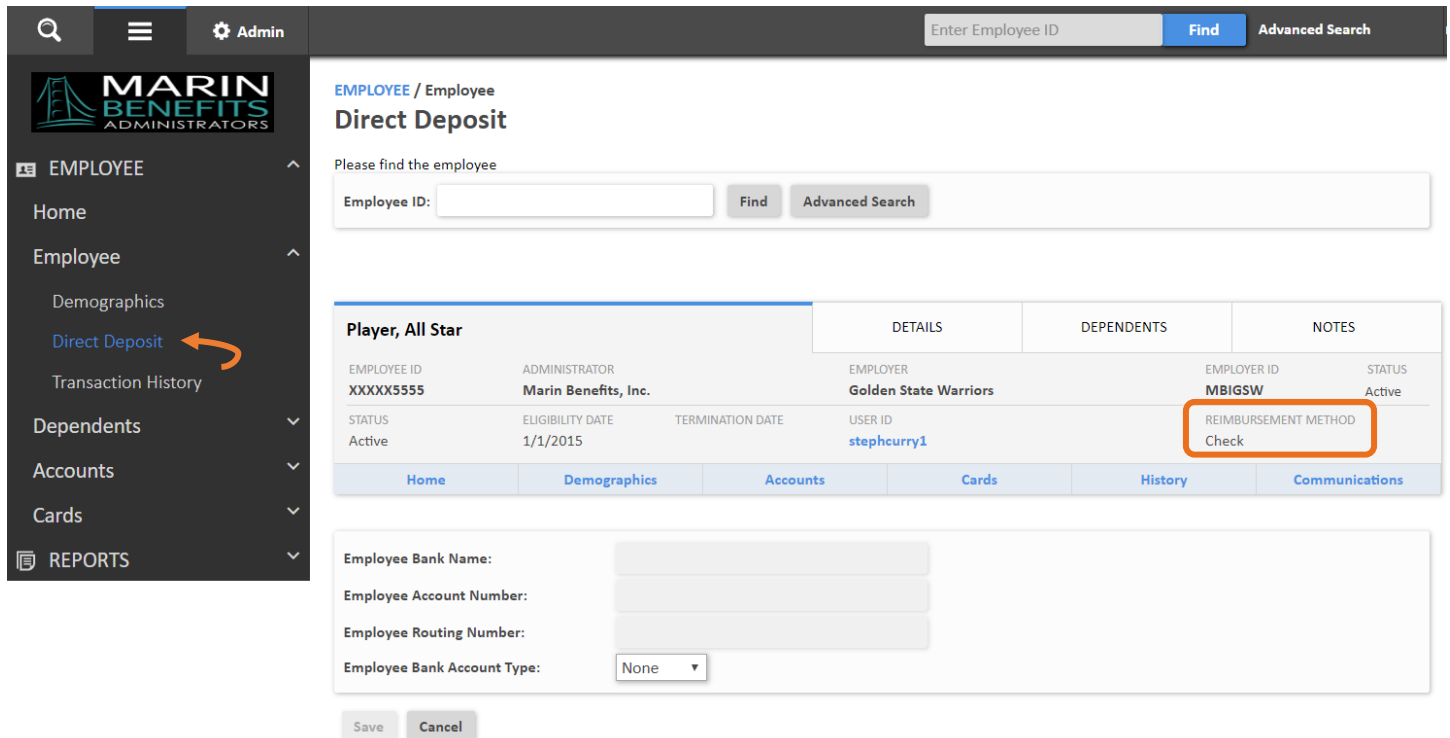
Transaction Date	Service Date	Participant	Transaction Type	Transaction Status / HSA Code	Plan	Description	Amount	Balance	Check/Trace Number
7/11/2016 5:23:55 PM	Start: 12/31/2015 End: 12/31/2015 Display: 7/11/2016	Player, All Star	Admin - Purchase Claim #: 20160711-3	Approved AAA1	ID: HCA Start: 1/1/2015 End: 12/31/2015	Total: (\$75.00) Approved: (\$75.00)		Current: \$1,425.00	2

1 transaction found.

How to View Employee Reimbursement Method



Navigate to **Direct Deposit** from the Employee tab, or select the **Direct Deposit Info** quick access navigation tile from the homepage. From here you can see an employee's default reimbursement method selection and Direct Deposit Bank Account if enrolled. If an employee has not enrolled for Direct Deposit, their default reimbursement method will remain a physical check.



The screenshot shows the Marin Benefits Administrator interface. The left sidebar has a menu with 'EMPLOYEE' expanded, and 'Direct Deposit' is selected with an orange arrow. The main content area is titled 'EMPLOYEE / Employee Direct Deposit'. Below the title is a search bar for the employee. A table displays employee details for 'Player, All Star', including fields for Employee ID, Administrator, Employer, Employer ID, and Status. The 'REIMBURSEMENT METHOD' is highlighted with an orange box and set to 'Check'. Below the table is a form for entering bank information, including Employee Bank Name, Employee Account Number, Employee Routing Number, and Employee Bank Account Type (set to 'None'). 'Save' and 'Cancel' buttons are at the bottom.

Player, All Star		DETAILS	DEPENDENTS	NOTES
EMPLOYEE ID	ADMINISTRATOR	EMPLOYER	EMPLOYER ID	STATUS
XXXXX5555	Marin Benefits, Inc.	Golden State Warriors	MBIGSW	Active
STATUS	ELIGIBILITY DATE	TERMINATION DATE	USER ID	REIMBURSEMENT METHOD
Active	1/1/2015		stephcurry1	Check

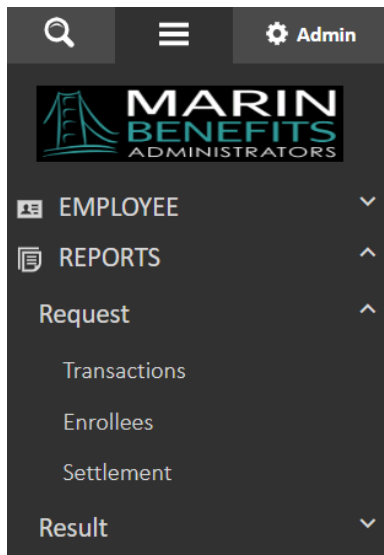
Employee Bank Name:

Employee Account Number:

Employee Routing Number:

Employee Bank Account Type:

How to Request a Report



To generate a report on demand, open the main menu, expand the reports section, and then expand request subsection. Reports are grouped by type: **Transactions**, **Enrollees** and **Settlement**. Click on the desired report type in the menu to see a list of available reports in that category.

Under Transactions, you will want to request either the **Transactions Report (TR)**. This report is a comprehensive list of all transactions within a date range.

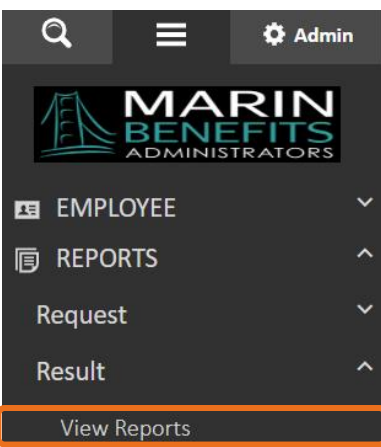
Transactions	The Transaction report is a comprehensive list of all transactions within a date range. View Details...
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For Enrollees, you will want to request **Enrollee Account Balance (EAB)**. This report provides administrators with a list of all participants detailing: Account Status, Annual Election, Deposits, Total Year to Date Disbursements and more.

Enrollee Account Balance	The Enrollee Account Balance report provides administrators with a list of all participants detailing: Account Status, Annual Election, Contributions Year to Date (Employee and Employer), Deposits, Total Year to Date Disbursements, Plan Forfeiture Balance, and Balance Due.
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For Settlement, you will want to request **Employer Funding Report (EFR)**. The Employer Funding Report includes banking details for debit card, direct deposit, and manual claims reimbursed by check to give administrators an idea of the total dollars being utilized by their participants for bank reconciliation. The report will detail claim activity for each date included in the report request, using settlement date for debit card and automated direct deposit claims, while using reimbursement date for checks and NACHA file direct deposits.

Employer Funding	The Employer Funding Report includes banking details for debit card, direct deposit, and manual claims reimbursed by check to give employers an idea of the total dollars being utilized by their participants for bank reconciliation. View Details...
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Once a report has been generated, employer users will need to retrieve their report in the results section of the reports menu by clicking **View Reports**, or by selecting the **Download Reports** quick access navigation tile from the homepage. You may also choose to have the portal deliver reports via email if preferred.

