Employer Portal Reference Guide

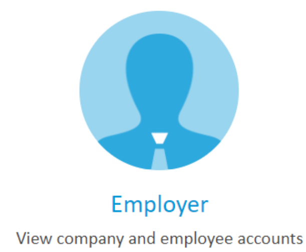
To help you familiarize yourself with the Employer Portal system interface, we've developed this reference guide to help navigate the system.

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

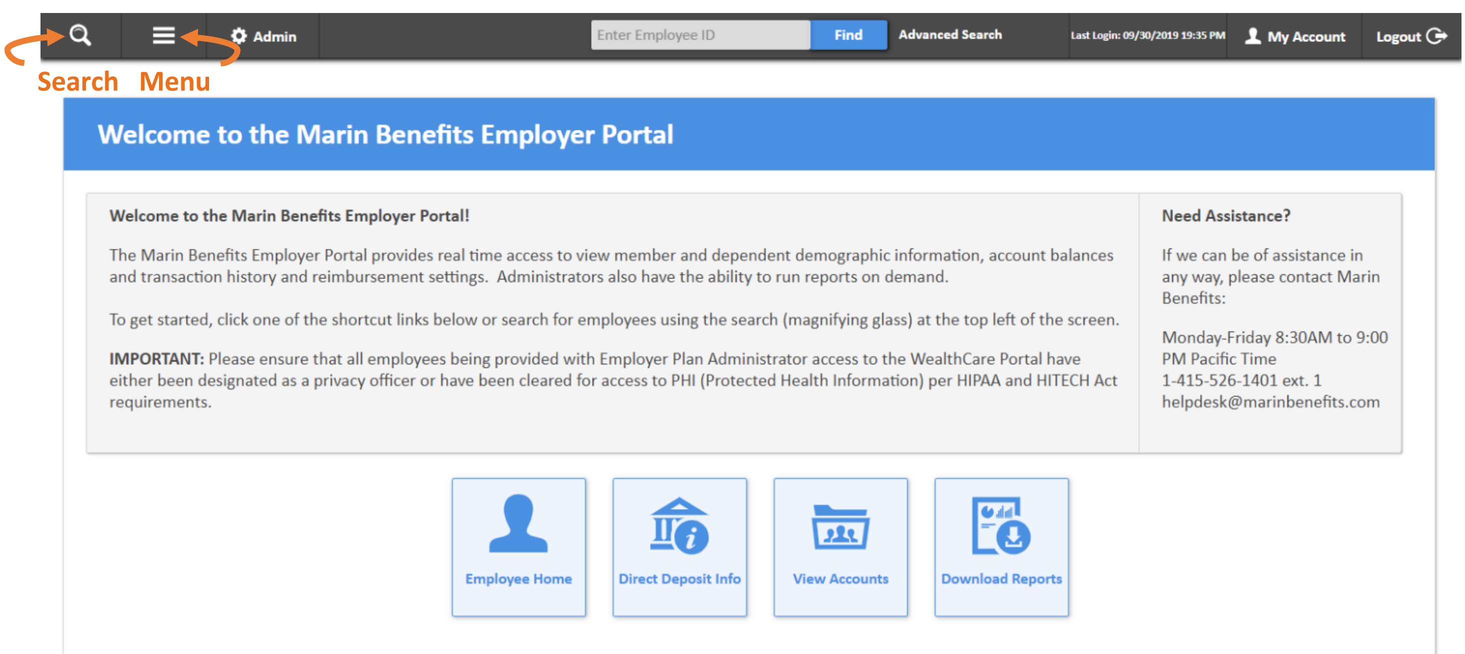
- View Employee Demographics
- View Dependent Demographics
- View Account Balances and Transaction History
- View Debit Card Status (if applicable to your plan)
- View Reimbursement Method
- Request Reports
- View and/or Download Requested Reports

Log-In Instructions

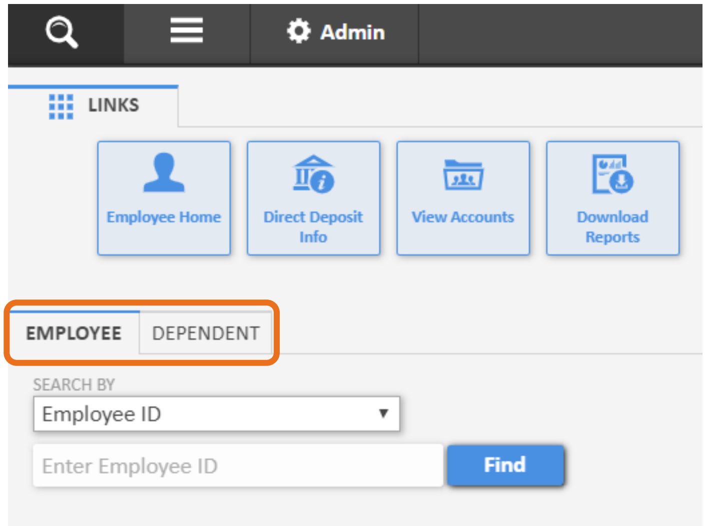
To access the Marin Benefits Employer Web Portal, navigate to **wealthcareadmin.com** and select **Employer**. Use the credentials provided by Marin Benefits to access your account. Please note that you may be prompted to change your password upon your first login-in.



Marin Benefits Employer Portal Homepage

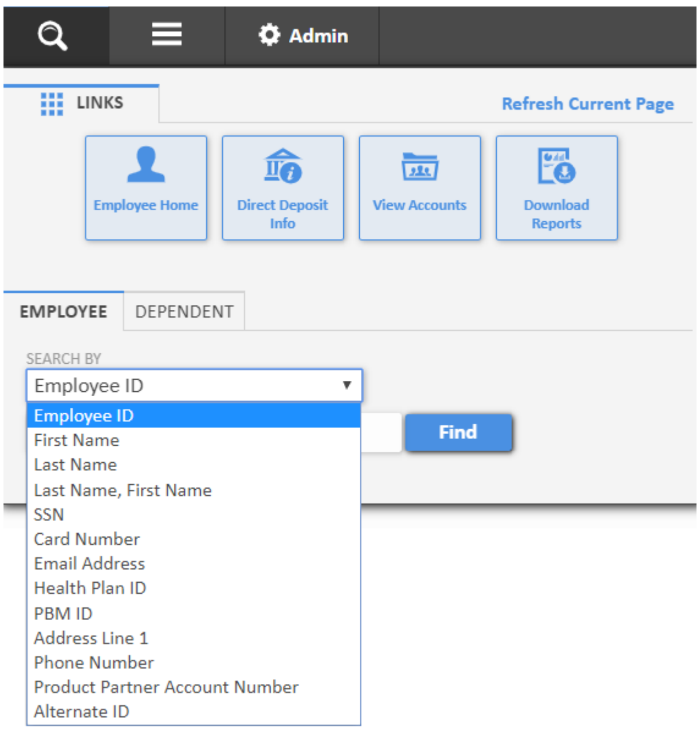


How to do a Quick Search for an Employee or a Dependent

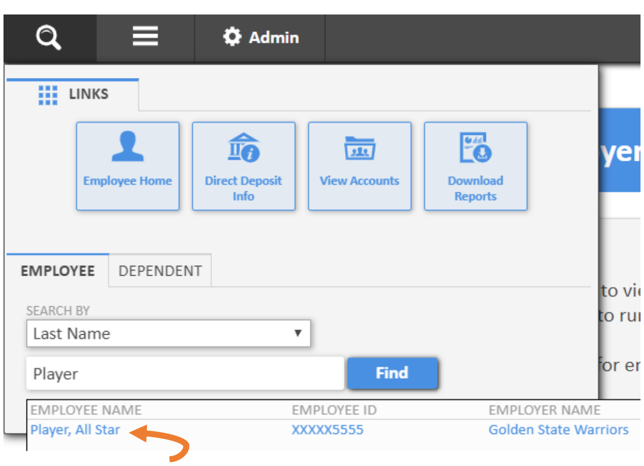


Once you are logged in to the Employer portal, you can search for an employee using the quick search feature, located in the top ribbon bar. Select the **magnifying glass** in the upper left corner of the ribbon bar. Clicking will expand the navigator tool, as shown on the left.

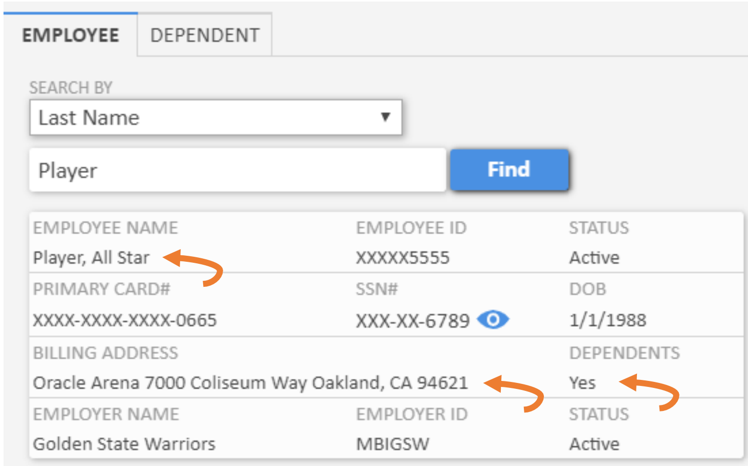
To search for an **Employee** you must be on the employee tab. To search for a **Dependent** you must be on the dependent tab.



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



After selecting an employee their details will display.

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

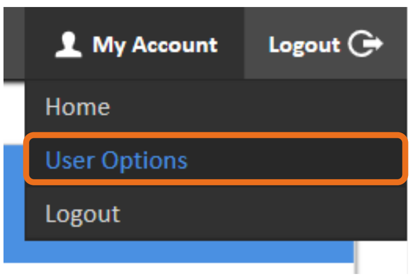
Click on the **Address** to be taken directly to the employee's demographic information.

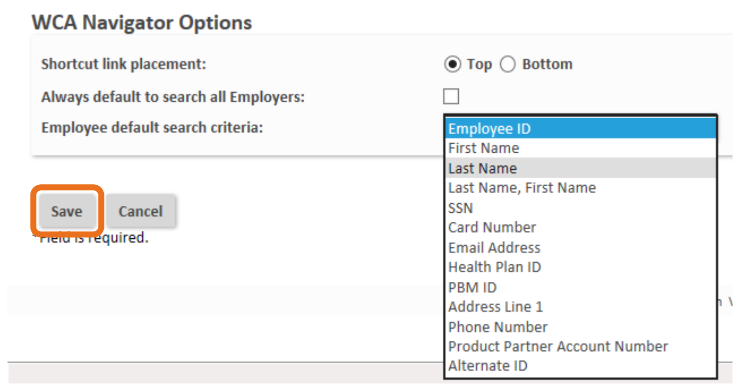
Click on **Dependents** to view associated dependent(s) information.

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**.



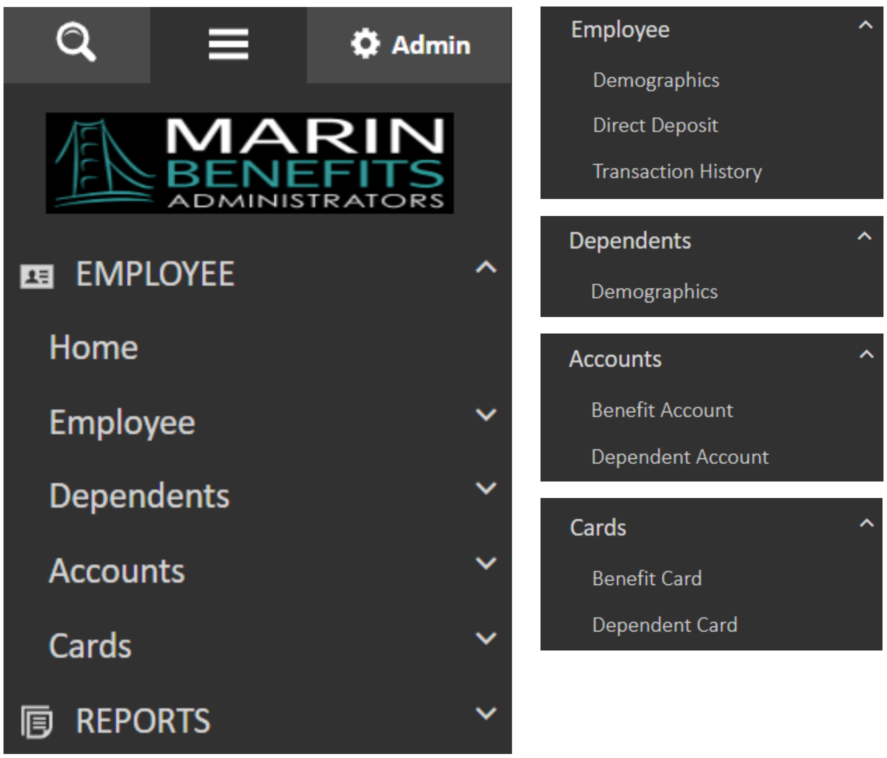


How to Use the Main Menu

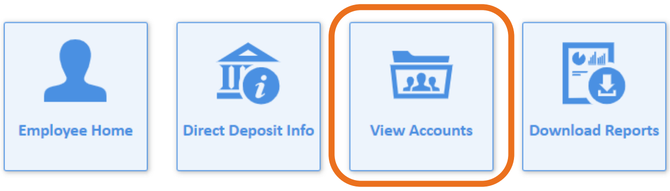
The main menu is a three-tiered menu and contains the pages used most commonly by administrators. In the main menu you can navigate to view **Employee** related information including employee demographic information, dependent demographic information, direct deposit account information, account balances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

Employee Main Menu Content

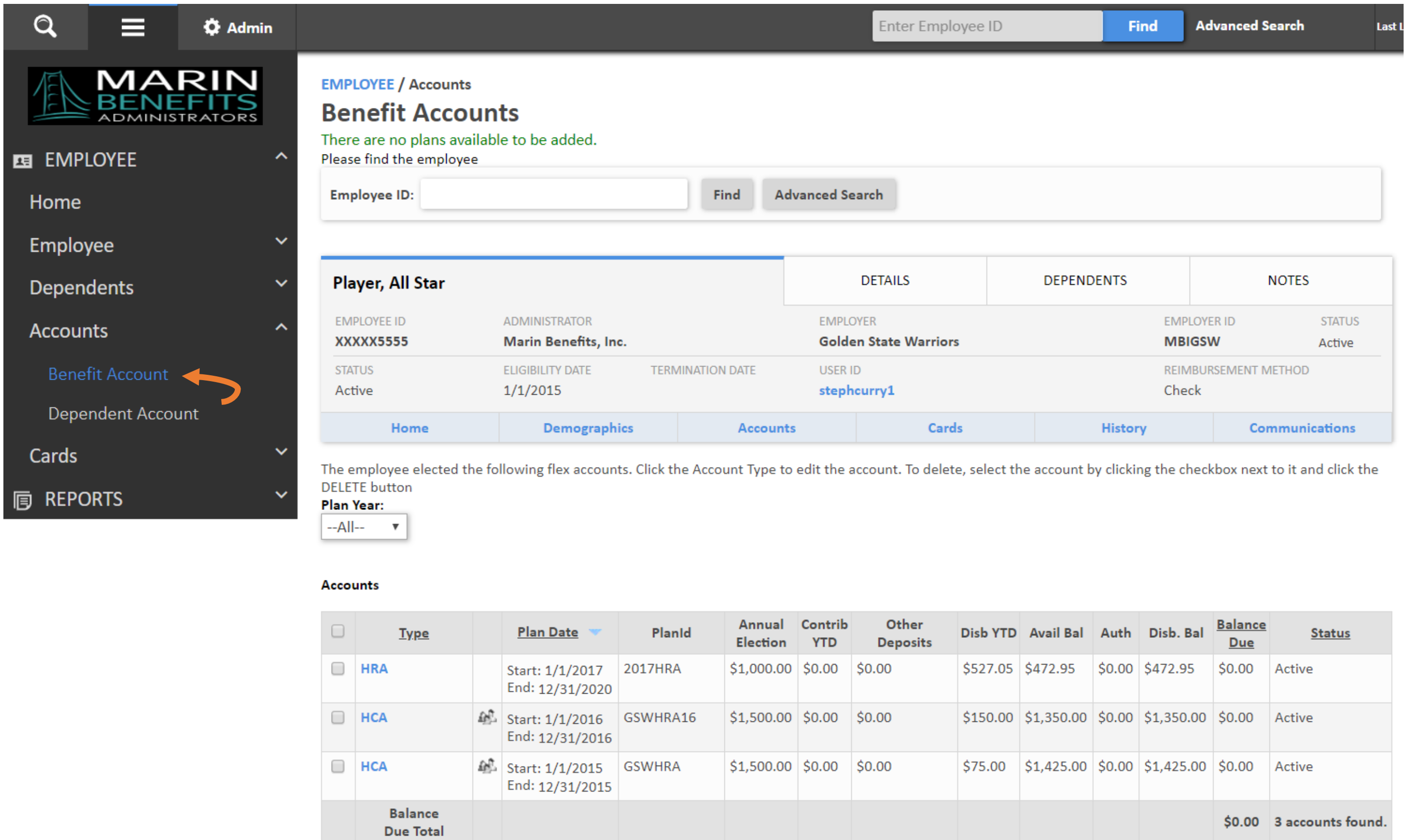
The employee main menu option provides access to all pertinent employee-related content.



How to View Employee Benefit Accounts and Plan Balance

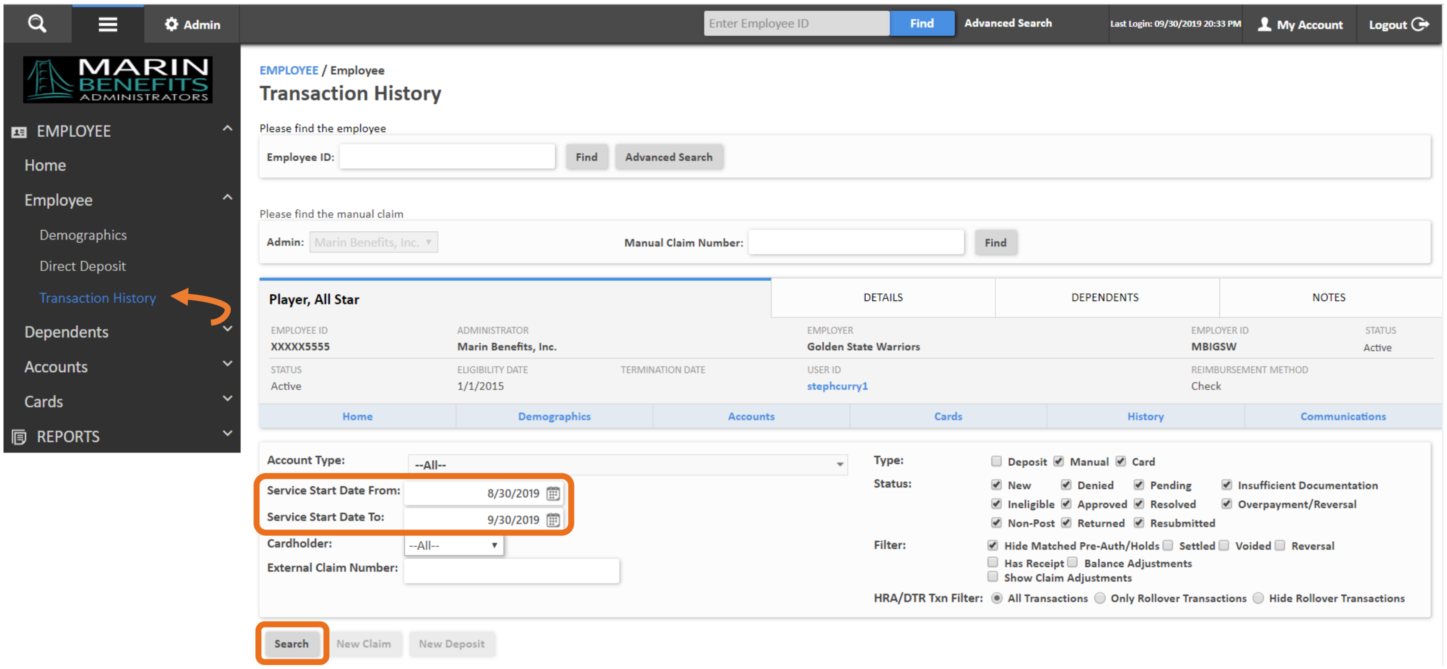


Navigate to **Benefit Account** under the Accounts tab, or select the **View Accounts** quick access navigation tile from the homepage. From here you can see an employee's annual election, disbursements and their available balance.

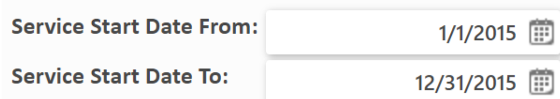


How to View Transaction History

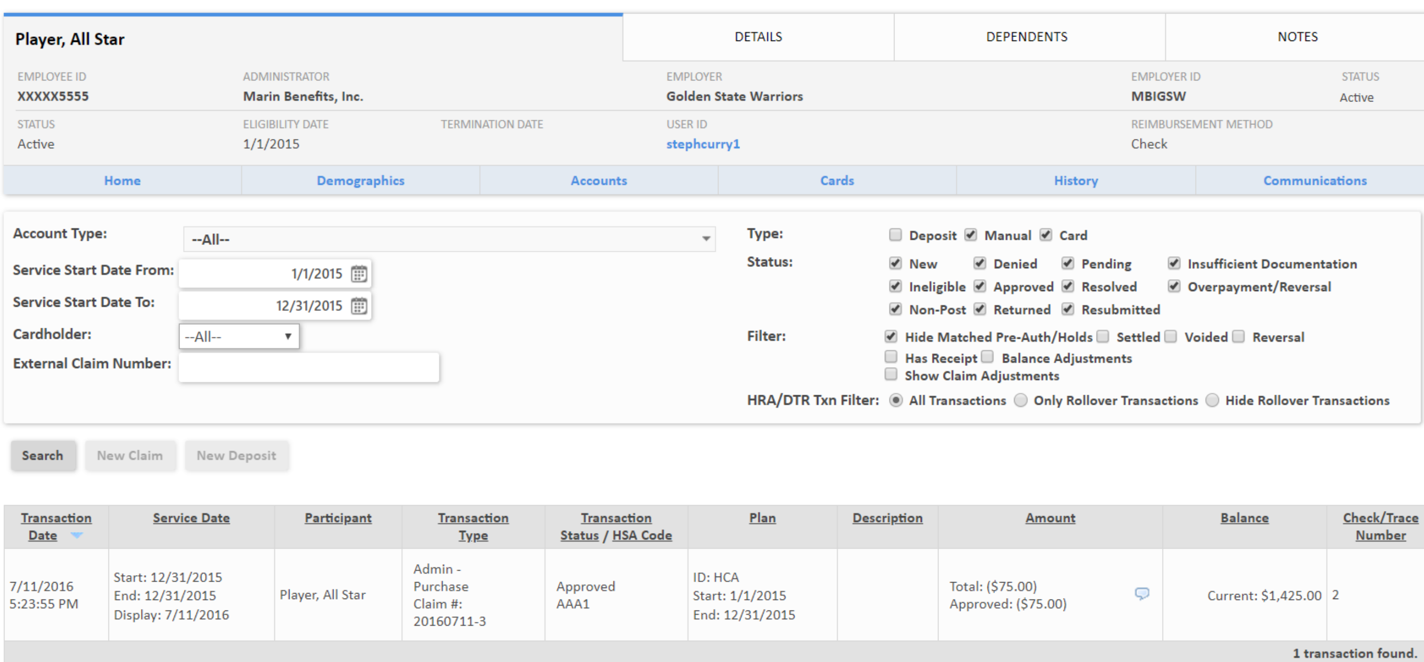
Navigate to **Transaction History** under the Employee tab.



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

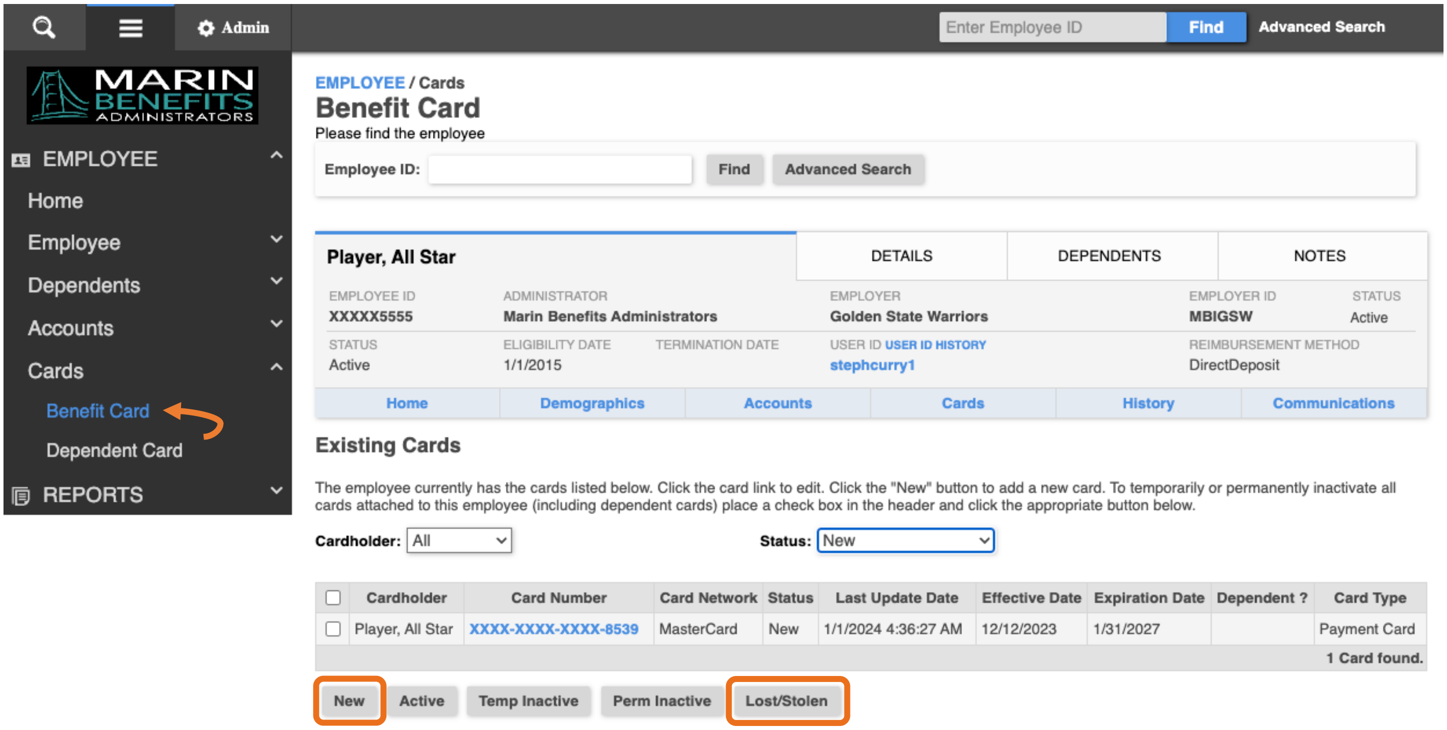


A listing of all transactions for the employee and associated dependents will populate.

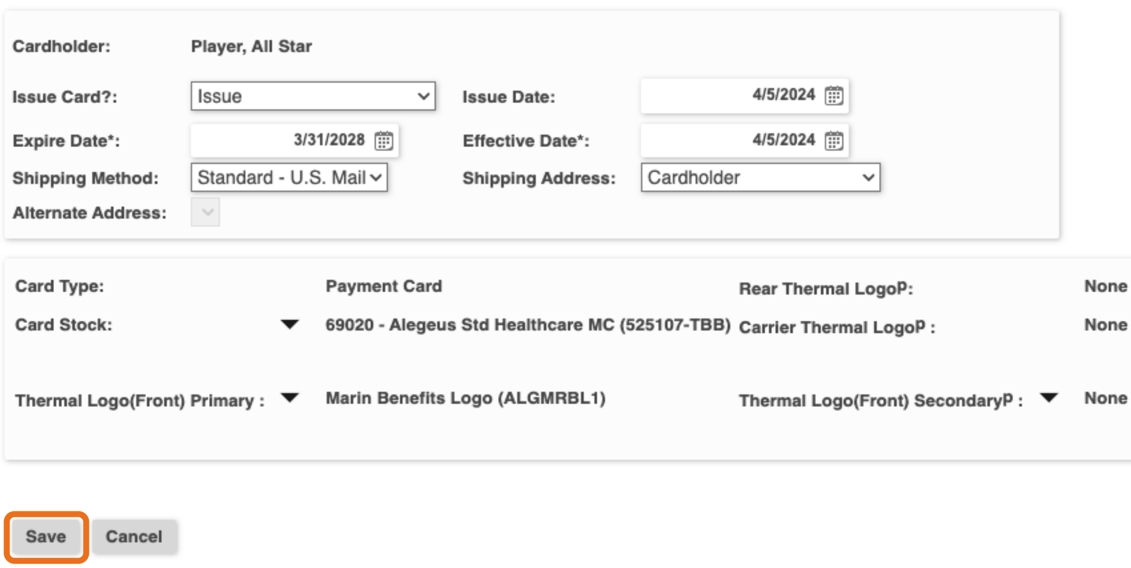


How to Replace a Lost or Stolen Benefit Card

Navigate to **Benefit Card** or **Dependent Card** under the Cards tab.



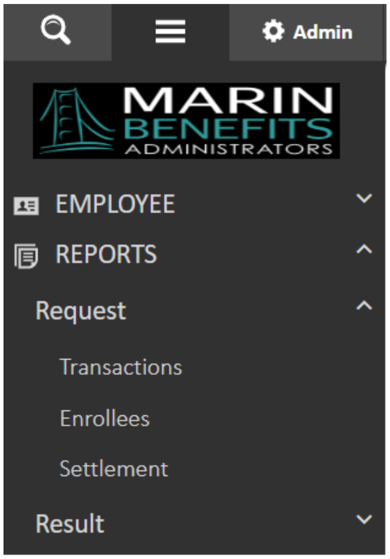
From here you can select a card to mark as **Lost/Stolen** and then issue a **New Card** if needed.



Keep all populated fields as-is and select **Save** to issue a new card.

Please note that marking a card as Lost/Stolen is not reversible. Any new cards issued will take approximately one week to arrive via USPS mail. Any cards issued via overnight or bulk overnight shipping (not recommended) will still take between 3 to 5 business days to ship and will incur a $40 fee to your organization per benefit card requested.

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.

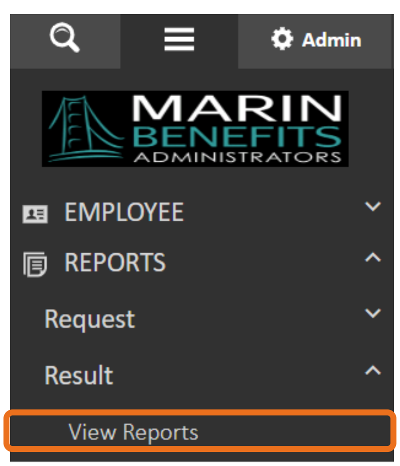
Transactions	The Transaction report is a comprehensive list of all transactions within a date range. View Details...

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.

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...



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 prefered.