



MidAmerica **Journey**

Employer Portal Upgrade Overview Guide

Your journey begins here.

Welcome to **MidAmerica Journey**, your new upgraded Employer Portal. This one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Flexible Spending Accounts (FSAs), and Health Reimbursement Arrangements (HRAs).

The Employer Portal is convenient and easy to use. Depending on your user role*, any-time access to the portal allows you to:

- View current and prior year plan information
- Access forms and documents
- Retrieve over 50 scheduled reports or notifications
- View individual participant account summary and balances, enrollments, claims and payments
- Access history of reports and notifications

****Please note that depending on your user role access, you may or may not see or be able to use certain functions of the portal. If you have questions, simply reach out to your Account Manager by emailing accountmanagement@myMidAmerica.com.***

Understanding your new homepage

Once you're logged in, everything you need to efficiently and effectively manage your benefits is found on the homepage. You will see a history of the reports and notifications with quick links to the latest versions.

You can also access frequently-used functions from the left-hand navigation.

New homepage overview:

- Left-hand navigation bar
- Employee Search on main page
- List of recent reports

The screenshot shows the homepage interface with a teal header bar containing a user profile icon labeled 'JD'. A left-hand navigation bar is highlighted with a red box, containing four items: 'Home' (with a house icon), 'Reports' (with a document icon), 'Employees' (with a group of people icon), and 'Tools' (with a wrench icon). The main content area features a 'New release!' banner with the text 'Here are some new enhancements to the Employer Portal' and a 'View details' link, accompanied by an illustration of a family. Below the banner is an 'Employee Search' section with a search input field labeled 'Search by name or ID' and a magnifying glass icon. A 'Reports' section is highlighted with a red box, displaying a list of reports with columns for report name, file type, and date. A 'View all reports' link is located at the top right of this section.

Report Name	File Type	Date
Employer Funding Report	Excel	Apr 26
Employer Contributions Report	CSV	Apr 24
Payroll Deductions Notification Report	PDF	Apr 20
Employer Claim History Report	Excel	Apr 11
Employer Contributions Report	CSV	Apr 5
Payroll Deductions Notification Report	PDF	Mar 28
Payroll Deductions Notification Report	PDF	Mar 28

Updated Reports Page

- From the homepage, click the **Reports** tab
- You will then see a full listing of reports. Select the relevant report and it will automatically be displayed.
- To run a new report, select the **New report** button.

The screenshot displays the 'Reports' page of a web application. The interface includes a teal header with a user profile 'JD' in the top right corner. A left sidebar contains navigation tabs: 'Home', 'Reports' (highlighted with a red box), 'Employees', and 'Tools'. The main content area is titled 'Reports' and features a '+ New report' button (highlighted with a red box). Below the title is a list of reports, with the first item 'Account balance detail' (Last run Aug 29, 2019) highlighted with a red box. Other reports include 'Account balance', 'Claim history', 'Debit card funding', 'Debit card transactions', 'Employer contributions', and 'Enrollment'.

Report Name	Last Run Date	Action
Account balance detail Plan balance summaries and consumer account balance	Last run Aug 29, 2019	>
Account balance Plan account balance information per participant	Last run Jul 23, 2019	>
Claim history View all claims submitted	Last run June 24, 2019	>
Debit card funding View summary of transactions and fee amounts	Last run May 24, 2019	>
Debit card transactions View a list of all the debit card transactions	Last run Apr 15, 2019	>
Employer contributions View employer contributions in applicable plans	Last run May 7, 2019	>
Enrollment View participant enrollment in applicable plans	Last run Mar 13, 2019	>

Accessing Employee-Level Data

- By selecting the **Employees** tab, you can get data on all of your HRA and/or FSA participants.
- You can also now conveniently search for employees from your homepage.
- Search for employees using first name, last name or employee identifier (defined ID or SSN).
- Once in the employee view, you can access the following information:
 - a. Account Summary (with account balances)
 - b. Enrollments
 - c. Claims
 - d. Payments
 - e. Status
 - f. Debit Card information

The screenshot displays the 'Employees' page in a web application. The page has a teal header with a 'JD' logo. A left sidebar contains navigation tabs: Home, Reports, Employees (highlighted with a red box), and Tools. The main content area is titled 'Employees' and features a search bar labeled 'Name or ID'. Below the search bar is a 'Recents' list with five entries: Margaret Gregory (ID 2009302), Paul Abbott (ID 2090012), Emma Harvey (ID 5748383), Dollie Estrada (ID 3666212), and Lawrence Hodges (ID 4933222). Each entry has an external link icon. Below the recents list are two active employee cards: 'Derrick Massey' (Effective Dec 27, 2018, Employee# 25211948) and 'Aiden Perez' (Effective Dec 27, 2018, Employee# 62761887). A 'FILTERS' panel on the right shows 'Employee status' set to 'All'.

Forms, Resources and Plan Details Access

- You can now locate plan forms, plan details and any other resource within your **Tools** tab.
- Select **Resources** to view and download forms, custom materials and other documents.
- Select **Links** to access quick links to other helpful sites.
- Select **Plans** to view general information on your plan, such as plan summaries, plan details and rules.

