

Tompkins HSA Employer Portal Quickstart Guide

Welcome to Tompkins HSA Employer Portal. This one-stop portal gives you the tools you need to better support your employees in the management of their Health Savings Accounts (HSAs).

The Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- Add, update and enroll employees
- Add and manage recurring contributions
- View current and prior year plan information
- Load data import files
- Retrieve scheduled reports or notifications
- Access history of reports and notifications
- Access helpful portal guides, documents, and links to HSA information
- Submit service requests

HOW DO I GET ACCESS TO THIS PORTAL?

1. You and your assigned contacts will be sent a temporary password to the email address provided in the Setup Form.
Your user name will be your first initial, last name, followed by HSA (ex. John Smith would be JSmithHSA).
2. Upon first login, you will be prompted to change the password.
3. Once password is updated and confirmed, click **Login**

The **Home Page** is easy to navigate:

Once logged on, everything you need to efficiently and effectively manage your Health Savings Account program is found on the home page. From the home page, you can:

- Check on status of data import files
- Set up one time or recurring contributions
- View employee-level data
- Review recent reports
- View the employer dashboard
- Log service requests

You can also access the tabs on the left side of the page for easy navigation.

The screenshot shows the Tompkins portal home page. At the top left is the Tompkins logo, and at the top right is the user identifier 'TB'. A navigation sidebar on the left contains icons for Home, Imports, Set up Contributions, Reports, Employees, Tools, Dashboard, and Requests. The main content area features a teal banner with the text 'You've got this!' and a sub-header 'Review and update participant accounts, upload enrollments, run reports and so much more.' Below the banner is an 'Employee Search' section with a text input field labeled 'Name or ID'. The page is divided into two columns: 'Imports' and 'Reports'. The 'Imports' column shows a summary of import statuses: '2 Imports need attention' (Review), 'Demographics' (Failed, Dec 2), 'Payroll deductions' (On hold, Dec 1), 'HSA claim data' (Processing, Nov 20), and 'Demographics 2' (Completed with errors, Oct 31). The 'Reports' column lists several reports with their dates and formats: 'Employer Funding Report' (Apr 26, Excel), 'Employer Contributions Report' (Apr 24, CSV), 'Payroll Deductions Notification Report' (Apr 20, PDF), 'Employer Claim History Report' (Apr 11, Excel), 'Employer Contributions Report' (Apr 5, CSV), 'Payroll Deductions Notification Report' (Mar 28, PDF), and 'Payroll Deductions Notification Report' (Mar 28, PDF).

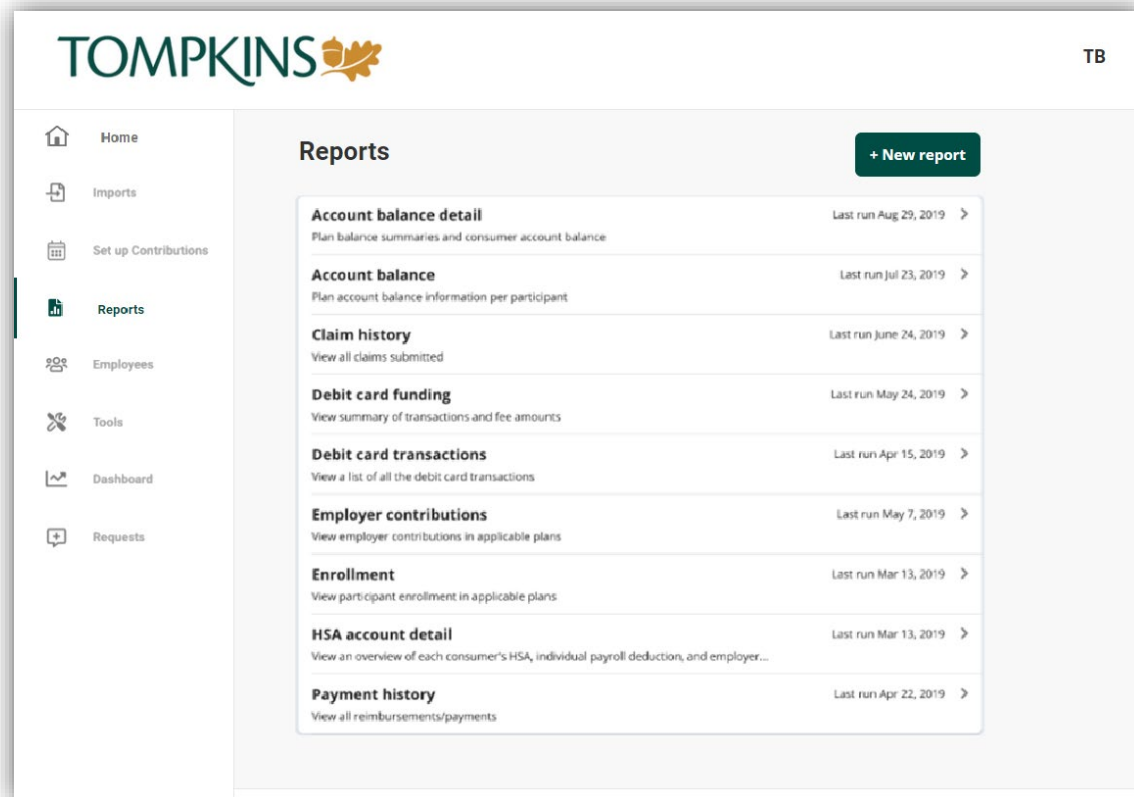
HOW DO I VIEW RECENT REPORTS AND NOTIFICATIONS?

1. Select the **Reports** tab,
2. Select the relevant enrollment, financial, contribution or plan information report desired and it will automatically be displayed.

WILL I BE ABLE TO RUN MY OWN REPORTS IF NEEDED?

1. Select the **Reports** Tab.
2. Click the New Report button.
3. Select the appropriate report type.
4. Complete the report detail fields.
5. Click **Request**.
6. The report will generate. If you selected the option an email is sent to you when the report is available.

If there is a report that you need, but do not see, you can contact Tompkins to request it.



The screenshot shows the Tompkins web application interface. The top left features the Tompkins logo with a leaf icon. The top right corner displays the initials 'TB'. A left-hand navigation menu includes icons and labels for Home, Imports, Set up Contributions, Reports (which is highlighted), Employees, Tools, Dashboard, and Requests. The main content area is titled 'Reports' and contains a '+ New report' button. Below this, a list of report types is shown, each with a title, a brief description, and the date it was last run with a right-pointing arrow:

Report Type	Last Run Date
Account balance detail	Aug 29, 2019
Account balance	Jul 23, 2019
Claim history	June 24, 2019
Debit card funding	May 24, 2019
Debit card transactions	Apr 15, 2019
Employer contributions	May 7, 2019
Enrollment	Mar 13, 2019
HSA account detail	Mar 13, 2019
Payment history	Apr 22, 2019

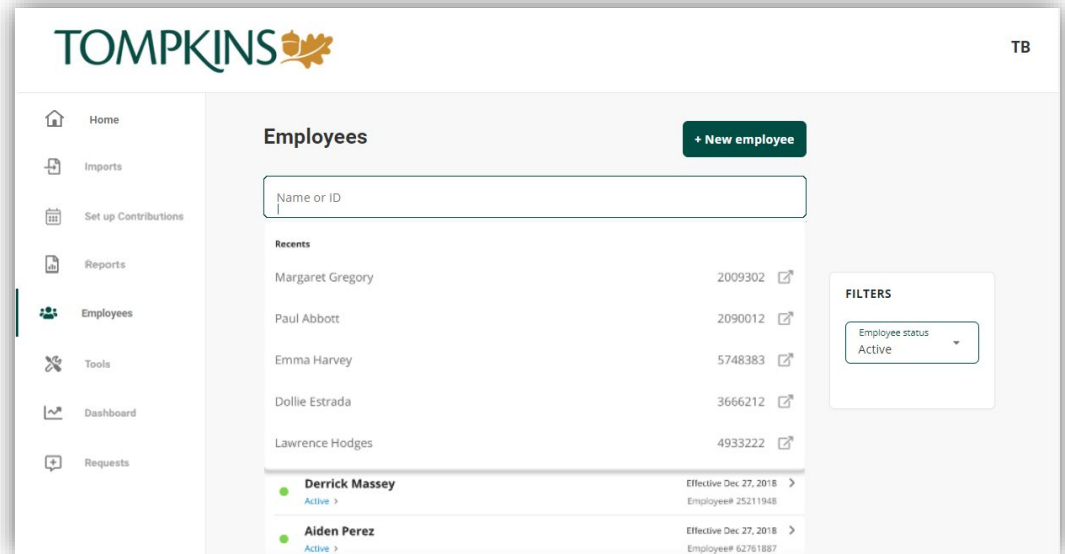
WHAT KIND OF EMPLOYEE-LEVEL DATA CAN I ACCESS?

1. By selecting the **Employees** tab, you can get real-time data on all employees.
2. You can search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access the following information:
 - a. Summary
 - b. Enrollments
 - c. Activity
 - d. *Payroll Contributions

HOW DO I GET ACCESS FOR A NEW HR REP OR ADD NEW EMPLOYEES?

1. Select the **Requests** tab.
2. Select **New Request**.
3. Under Request Type, there is a drop-down menu with options to choose from.
4. Choose the request type, i.e. add a new employee, add employer contact or change payroll deductions, then select a consumer from a list of employees, enter the request details and/or attach a document or file.
5. Click Submit Requests
6. All requests are securely delivered.

*Payroll contributions will only be visible if they are done through the Employer Portal.



WHERE WOULD I ACCESS REQUIRED FORMS, PORTAL GUIDES, AND HSA INFORMATION?

1. Under the **Tools** tab use both the **Portal Links** tile and the **Resources** tile to find guides to both the Employer and Consumer portal and links to additional information regarding HSAs.



The screenshot displays the Tompkins portal interface. On the left is a vertical navigation menu with icons and labels for: Home, Imports, Set up Contributions, Reports, Employees, Tools (highlighted in teal), and Requests. The main content area is titled "Tools & Support" and contains a section for "Support resources" with three tiles: "Portal Links" (with a link icon and text "Links added by your administrator"), "Plans" (with a clipboard icon and text "Your active plan list and past plan archives"), and "Resources" (with a book icon and text "A knowledge base for forms and documents").

WILL I BE ABLE TO ADD/ENROLL/UPDATE EMPLOYEES?

1. Under the **Employees** Tab.
2. Click the **New Employee** button.
3. Enter the Personal and Employment Information.
4. Click **Add Employee**.
5. Select the **Enrollments** link.
6. Click **New Enrollment**.
7. Select the **Plan Year** (defaults to HSA) and click **Next**.
8. **Select one or more of the plans** (defaults to Health Savings Account) and click **Next**.
9. Select the **Primary Payment Method** (defaults to Debit Card for primary and Check for alternative) and click **Next**.
10. Complete the enrollment **Plan Details** for each plan listed and click **Submit**.

WILL I BE ABLE TO UPDATE AN EMPLOYEE STATUS?

1. Select the **Employees** tab.
2. Search and select the employee using first name, last name, or employee identifier (employee ID or SSN)
3. Select your option from the **Status** drop-down menu.
4. Enter the status **Effective Date**.
5. Click Show status history.
6. Click Add.

The screenshot displays the TOMPKINS HR system interface. The top navigation bar includes the TOMPKINS logo and the user initials 'TB'. A left sidebar contains navigation icons for Home, Imports, Set up Contributions, Reports, Employees, Tools, Dashboard, and Requests. The main content area is titled 'Imports' and features a '+ New import' button and a search box for file names. The interface is organized into four status categories: Pending, Needs Review, Processing, and Completed. The 'Needs Review' section lists several items with 'Review' buttons, including 'Employer contribution' (On hold), and three 'Demographic template' files (v3, v2, v1) that have failed. The 'Processing' section shows 'Contributions 11/6' and an 'Enrollment file'. The 'Completed' section lists various files, including a cancelled 'Demographic file', 'Transportation services 2019' (with errors), 'Enrollment report 2019' (with warnings), 'Address updates' (successful), and 'HDHP coverage level update' (with warnings). A 'FILTERS' sidebar on the right allows filtering by 'Date received from' (8/15/2019) and 'Date received to' (11/13/2019).

WILL I BE ABLE TO UPDATE AN EMPLOYEE'S HDHP COVERAGE?

1. Select the **Employees** tab.
2. Search and select the employee using first name, last name, or employee identifier (employee ID or SSN)
3. Select the **Enrollments** tab.
4. Click on **HSA**
5. Click on **Edit HDHP coverage**.
6. Select Individual or Family coverage for the appropriate year.
7. Click Save.

The screenshot displays the TOMPKINS employee portal interface. On the left is a navigation sidebar with icons for Home, Imports, Set up Contributions, Reports, Employees (highlighted), Tools, and Requests. The main content area shows a breadcrumb trail: < Back to Employees > Sample Employee > Status: Active >. Below this are two tabs: Summary and Enrollments (selected). The Enrollments section is titled 'Active: Health Savings Account' and contains a table of HSA account details. The table shows an active HSA account for 'Sample #' with an effective date of Jan 21, 2022. It lists contribution data for 2022 and 2023. For 2022, total contributions are \$5,015.00, with employer contributions of \$5,015.00 and employee contributions of \$0.00. For 2023, all contribution amounts are \$0.00. At the bottom of the table are buttons for 'View contributions', 'View deductions', 'Edit HDHP coverage', and 'Edit enrollment'.

Active: Health Savings Account		
HSA Account Summary		
HSA Account Number	Sample #	Effective Jan 21, 2022 Enrolled
2023		
Total contributions	Employer contributions	Employee contributions
\$0.00	\$0.00	\$0.00
2022		
Total contributions	Employer contributions	Employee contributions
\$5,015.00	\$5,015.00	\$0.00
Show more		

ONE OF THE FEATURES OF THE PORTAL IS THE ABILITY TO IMPORT DATA. HOW DOES THAT WORK?

1. Under the **Imports** tab you can import demographic, enrollment and contribution files directly into the portal using standard Excel or CSV formatted import files.
2. Once in the Imports home page, select **New Import**.
3. Select the **Import Type** you would like to import.
4. Click **Download Template** and then click **Next**.
5. Check for field matches, click **View file setup requirements** link to review the fields.
6. *Enter or paste your data into the template.
7. Save the template as CSV or Excel to a location you can remember.
8. Click **Browse** to upload the file.
9. Click **Import**.

Once imported, any errors are displayed and can be easily updated by clicking the **Review & Fix** button. Click the **Fix All** button for the record line and you can correct the error(s). Then, click **Queue Record** once corrections are made. Then click the **Resubmit File** button to import the corrected records.

*View the *HSA Employer Portal Quickstart Guide Supplemental – Templates* for additional information

The screenshot displays the Tompkins HSA Employer Portal's 'Imports' section. The interface includes a sidebar with navigation links: Home, Imports, Set up Contributions, Reports, Employees, Tools, Dashboard, and Requests. The main content area is titled 'Imports' and features a '+ New Import' button and a search bar. The data is organized into four categories: Pending, Needs Review, Processing, and Completed. The 'Needs Review' section lists several items with status indicators and 'Review' buttons. The 'Completed' section lists items with status indicators and completion dates. A 'FILTERS' sidebar on the right allows filtering by 'Date received from' (8/15/2019) and 'Date received to' (11/13/2019). The Tompkins logo and 'TB' are visible at the top.

