

Employer Portal QuickStart Guide

Welcome to UMR's iCloud Employer Portal.

This one-stop portal gives you the tools you need to better support your employees in the management of their consumer-driven health plans. The screen shots provided in this guide are samples only.

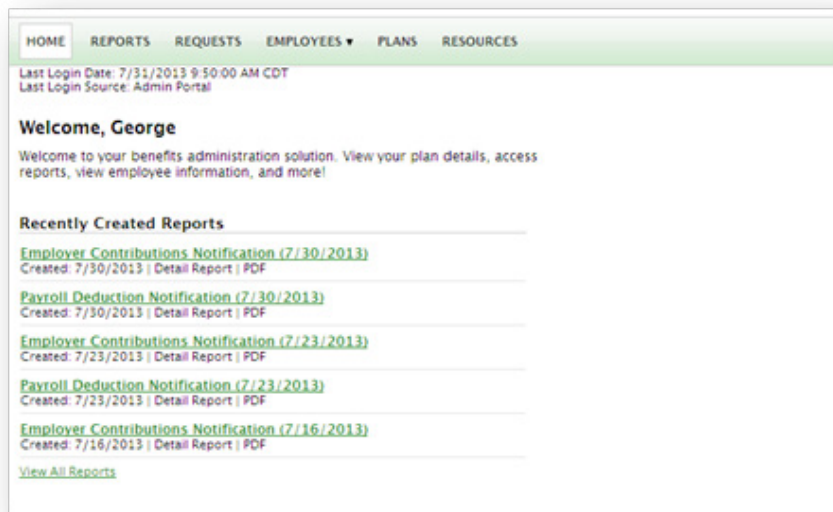
The Employer Portal is convenient and easy to use. Anytime access to the portal allows you to:

- View current and prior year plan information
- Access forms
- Retrieve scheduled reports or notifications
- View real-time individual participant account summaries and balances, enrollments, contributions, claims and payments
- Access a history of reports and notifications

User access levels are role-based. Each role determines access rights, not only to administrative pages and operations but to underlying data in applicable reports.

How do I gain access to this portal?

1. Go to **umr.com**
2. Click on Get Started under Consumer Accounts/Flex Spending Account (FSA) located under the myEmployee Assistance tab
3. Enter your existing UMR portal username
4. Enter your temporary password: Password1
5. When you log in the first time, you will be prompted to change the password. This password must have at least 6 characters (maximum of 20), contain upper and lowercase letters, and contain at least one number
6. Once the password is updated and confirmed, click Login. Please be sure to store your password in a secure place for future access.



The **Home** page is easy to navigate.



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Once you are logged on, everything you need to efficiently and effectively manage your consumer-driven health plans is found on the home page. You will see a history of the reports and notifications, with quick links to the latest versions. From the home page, you can:

- View employee level data
- Download forms

You also can access the tabs at the top of the page or links at the bottom of the page for easy navigation.

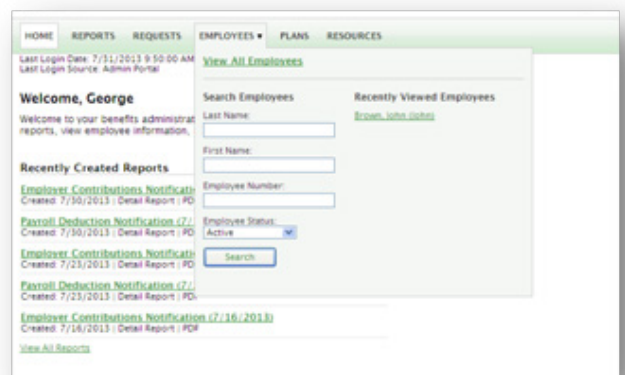
How do I view reports and notifications?

1. On the Home page, under the **Reports** tab, there will be a list of all available reports.
2. Simply select the desired enrollment, contribution or plan information report and it will automatically be displayed.
3. If there is a report that you need, but do not see, you can contact UMR to request it.



What kind of employee-level data can I access?

1. Under the tab titled **Employees**, you can view real-time data on all enrolled employees.
2. You can search for employees using first name, last name or an employee identifier (defined ID or SSN).



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3. Once in the employee view, you can access the following information:
 - a. Account summary
 - b. Demographics
 - c. Account balances
 - d. Enrollments
 - e. Contributions
 - f. Claims
 - g. Payments
 - h. Status

HOME REPORTS REQUESTS EMPLOYEES PLANS RESOURCES

Last Login Date: 7/31/2013 9:50:00 AM CDT
Last Login Source: Admin Portal

John Brown: Profile
Employee Status: Active (9/1/2003)
Employee Number: John

Profile Dependents Account Summary Enrollments Contributions Claims Payments Status

Personal Information

Name:	John Brown
Username:	jbrown1
SSN:	xxx-xx-9999
Gender:	Male
Marital Status:	Married
Address:	511 Brown Ave Slickton, WI 54533
Country:	United States
Home Phone:	(262) 545-6613
Work Phone:	--
Email:	john.brown@gmail.com

Employment Information

Status:	Active
Status Effective Date:	9/1/2003
Employee Number:	John
Employer Employee ID:	0001455
Hire Date:	9/1/2003
Hours Worked Per Week:	40

Where would I access required forms?

1. Under the **Resources** tab
2. Download and print any forms needed
3. Access any other documents related to your plans

HOME ACCOUNTS PROFILE NOTIFICATIONS FORMS Jane Doe | Logout

Last Login Date: 8/5/2013 2:53:22 PM CDT
Last Login Source: Consumer Portal

Forms

[Claims Terms and Conditions](#)
[Healthcare FSA Claim Form PDF](#)



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