

# UnifyHR Web App Guide

The purpose of this guide is to assist in looking up an employee and viewing an employee's record on the UnifyHR web app.

## Looking up an Employee

Step 1: login to your ACA dashboard <https://app.unifyhr.com>

Step 2: select the employees tab and a search window will appear like the below image:

The screenshot shows the 'Employee Search' interface. At the top, there is a dark blue header with a magnifying glass icon and the text 'Employee Search'. Below this is a 'Navigate To...' dropdown menu. The main search area has a blue header with a magnifying glass icon and 'Employee Search'. The search form contains the following fields and controls:

- Account Number: Text input field
- First Name: Text input field
- Last Name: Text input field
- Employer: Dropdown menu with '-Select All-'
- Employee ID: Text input field
- Record Status: Dropdown menu with 'Active Only'
- Email Address: Text input field
- Segment: Dropdown menu with '-Select All-'
- Search Dependents: Checkbox
- Buttons: Search, Clear, Insert
- Footer: [View UnifyHR ADA Compliant Page](#)

There are several data elements that can be used to look up an employee:

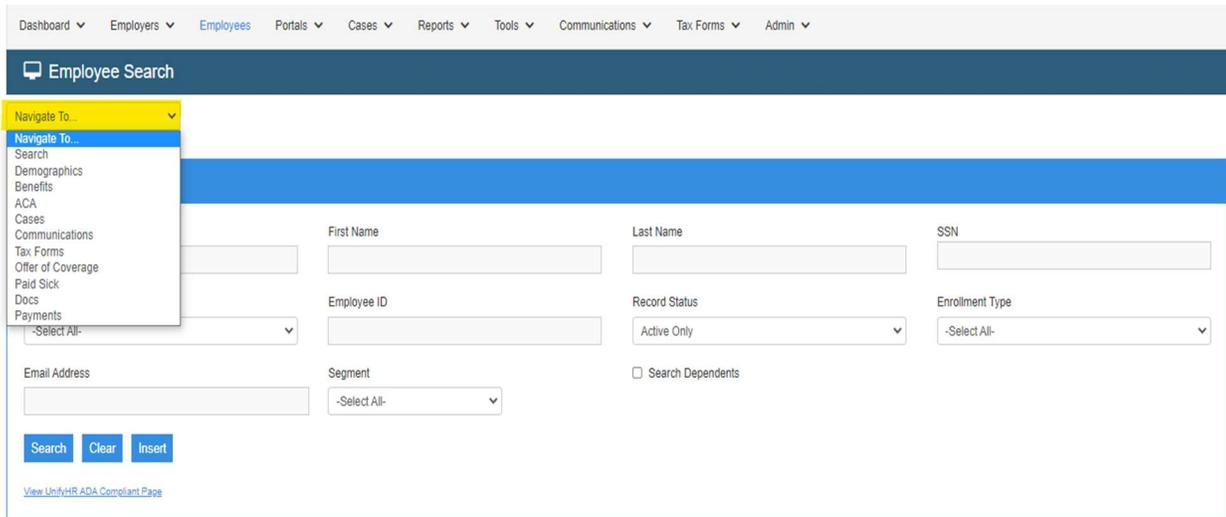
- **Account Number**- this is the UnifyHR assigned account number
- **First Name**- Employee's first name as sent on the files
- **Last Name**- Employee's last name as sent on the files
  - Any combination of letters can be used when doing a name search.
  - You can also search by First or Last Name only. Both names are not required to search.
- **Employee ID**- this is the unique employee ID that has been generated by CFA.
  - Leading zeros (if applicable) required.
- **Email Address**- This is the email address that has been sent on the demographic files

## Notes

- **Multiple Records**
  - If you search via name search and more than one record appears, click on the [Select](#) link next to the name of the employee you were searching for. ***\*\*Nothing happens when the Select link is clicked on. Taking this action lets our system know what record you are trying to view.***
- **Single Record**
  - You **do not** need to click on the [Select](#) link if only one record appears. Move to the next step under this scenario.

## Navigating an Employee Record

Once you have located the employee, select the page you are trying to view from the drop-down menu that is below the **Employee Search** Title Bar.



The screenshot shows the 'Employee Search' interface. At the top, there is a navigation bar with dropdown menus for Dashboard, Employers, Employees, Portals, Cases, Reports, Tools, Communications, Tax Forms, and Admin. Below this is the 'Employee Search' title bar. A 'Navigate To...' dropdown menu is open, listing options: Search, Demographics, Benefits, ACA, Cases, Communications, Tax Forms, Offer of Coverage, Paid Sick, Docs, and Payments. The main search area contains several input fields: First Name, Last Name, SSN, Employee ID, Record Status (set to 'Active Only'), Enrollment Type (set to '-Select All-'), Email Address, and Segment (set to '-Select All-'). There is also a checkbox for 'Search Dependents'. At the bottom left of the search area are buttons for 'Search', 'Clear', and 'Insert'. A small link at the bottom left reads 'View UnifyHR ADA Compliant Page'.

For ACA, you have the option of viewing the below pages:

- **Demographics:**
  - This page will allow you to view all of the Demographic data that has been passed to UnifyHR via file transfer.
  - This includes Employee name, Date of birth, Address, Hire Date, and other Employee information
- **Benefits:**
  - This page will allow you to view the Employee (and applicable Dependent) enrollment info. This is also passed to UnifyHR via file transfer.
    - Please note: UnifyHR is still working with the benefit administrator to load the medical benefits into the UnifyHR system. No benefit info is currently showing on this screen.
- **ACA:**
  - This page displays the Employee's ACA status and ACA Measurements that have completed and are currently ongoing.
  - The table on this page also shows the Stability Outcome and what subsequent (or current) Stability Period looks like.
  - Please reach out to an ACA Expert, via the Hub, for assistance navigating this page
- **Communications**
  - This page will display all communications that have went out to the employee.
  - This also includes official electronic copies of all 1095s that have been mailed by UnifyHr.
    - Operators will have the functionality to lookup a previously mailed 1095 form and download or print the form so that it can be forwarded to the requesting employee.
- **Offer of Coverage**
  - This page shows a current snapshot of what ACA codes would appear in Section II, lines 14, 15, and 16 on the Employee's 1095 form.
  - This section is updated monthly based on data received and UnifyHR processes ran.