

Helsana ELM-Web User Manual

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1. Introduction

This user manual describes the most important functions of the Helsana ELM-Web web portal for payroll declarations. The document is intended for our corporate customers who will use the web-based payroll declaration system in the future.

In December, you will receive a request to submit a payroll declaration. On the request form, you will find the link, your personal registration number and information about your password.

1.1 Legend

In this manual, you will find the following types of legend.

A blue callout box with a pointer pointing towards the top-left. It contains text describing the 'actions' legend.

Describes the **actions** that you can initiate as a **user**.

A red callout box with a pointer pointing towards the top-left. It contains text advising caution when using functions.

Please note that **caution** is advised when using these functions.

2. Registration

For your payroll declaration on the Helsana ELM-Web platform, you can use the following web browsers:

- Firefox
- Chrome
- Edge
- Safari

Click on this link to go directly to the desired page and begin the registration process:

www.helsana.ch/elm.

Click on “sign up here” to go to the necessary page.

Login

Username

Password

Login

[Password forgotten](#)

You can [sign up here](#) if you don't have an account yet.

You need to register before submitting your first declaration via Helsana ELM-Web.
Click on “sign up here” to go to the necessary page.

Please enter your login information as a user of the ELM service.

Data registration

Please complete the fields to register for our service.

First name*	<input type="text" value="Max"/>
Last name*	<input type="text" value="Mustermann"/>
User Name (e.g. Email or company name)*	<input type="text" value="Test456"/>
Registration number*	<input type="text" value=""/>
Current premium invoice number (from the last 12 months).*	<input type="text" value=""/>

* = Required field

You will have received your registration number along with our request to submit a payroll declaration. Please enter a current premium invoice number.

After entering your personal registration data, click on "Continue" to go to the next page.

Data registration

Please complete the fields to register for our service.

Email*

Cancel

Continue

After you have entered your e-mail address, click on "Continue".

[Help, information and instructions](#) [Data protection](#) [Legal information](#)

You will then receive an e-mail at the e-mail address you provided, including a registration code for confirmation or activation. Please check your spam folder if you do not receive an e-mail.

Registrierungsbestätigung



info.b2b@helsana.ch

To Helsana

Links and other functionality have been disabled in this message. To turn on that functionality, move this message to the Inbox.

[EXTERNAL SENDER]

Sehr geehrte(r) Max Mustermann

Bitte bestätigen Sie die Registrierung mit Benutzername Test456 mit diesem Code: 526668.

Freundliche Grüsse
Helsana

Email Verification

A security code has been sent to your email address. Please wait for the email and enter the code below.

Security code

Cancel

Verify

After you have entered the security code from the e-mail, click on "Verify".

[Help, information and instructions](#) [Data protection](#) [Legal information](#)

Enter mobile number

Please complete the fields to register for our service.

Mobile phone number*

Cancel

Continue

[Help, information and instructions](#) [Data protection](#) [Legal information](#)

Now enter your mobile number and then click on "Continue".

You will then receive a security code by SMS to the mobile number you entered.

Phone Number Verification

A security code has been sent to your mobile phone. Please wait for the message and enter the code below.

Security code

Cancel

Verify

[Help, information and instructions](#) [Data protection](#) [Legal information](#)

Now, please enter the SMS security code you have received and then click on "Verify".

Choose a password

Please choose a password.

Password*

Password Confirmation*

Cancel

Continue

Enter your desired password here and then click on "Continue".

The password must be at least 8 and at most 30 characters long and must contain at least one number, one lower case letter and one upper case letter.

[Help, information and instructions](#) [Data protection](#)

In this window you can set a password.

The password must meet the following criteria:

- At least 8 characters
- Maximum 30 characters
- At least one upper- and lower-case letter
- At least one number

If you have entered the correct code, you will see this confirmation page.

Self-registration completed

The self-registration has successfully been completed.

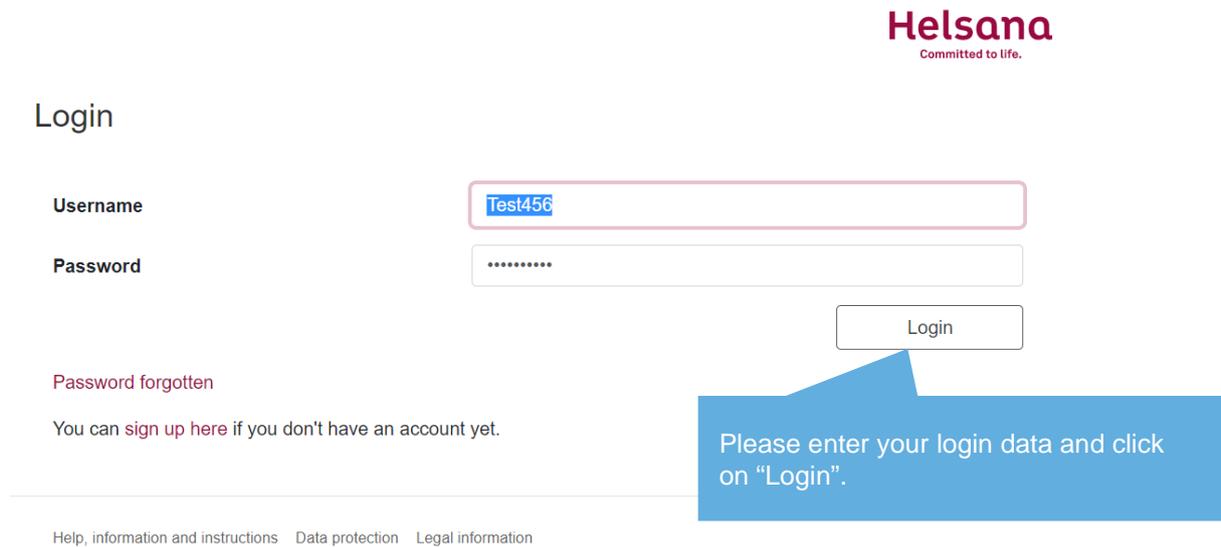
Continue

[Help, information and instructions](#) [Data protection](#) [Legal information](#)

Now click on "Continue" to go to the login page.

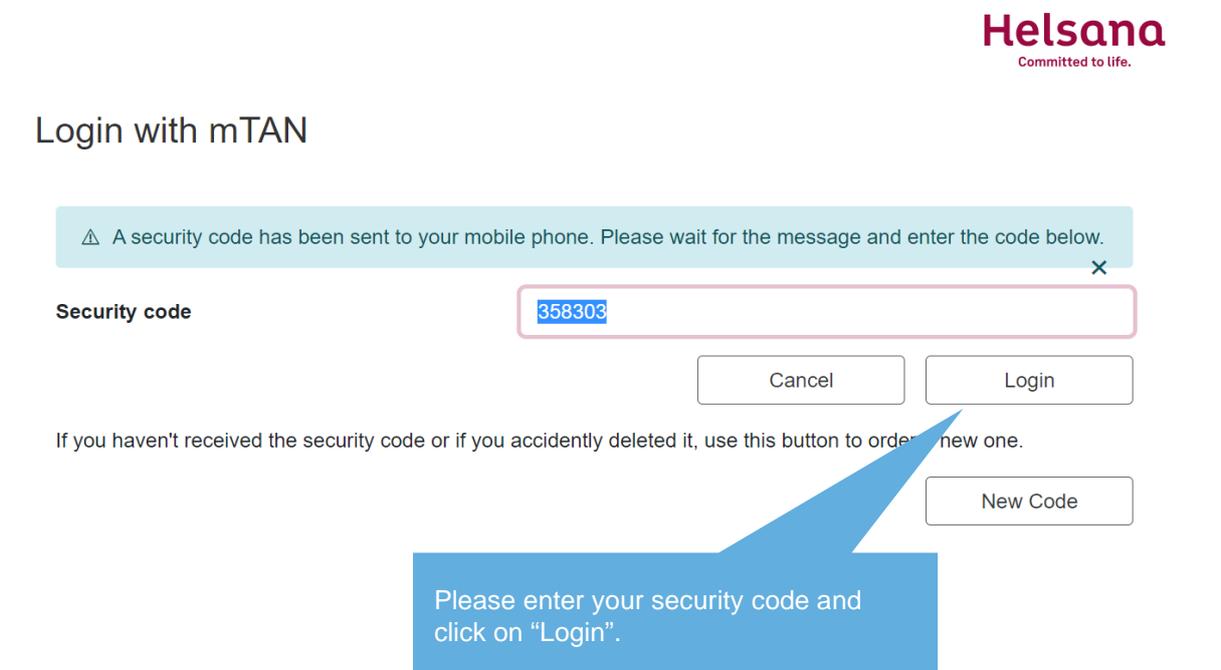
3. Login

Once you have registered, you can log in normally on all subsequent occasions. Go back to the homepage helsana.ch/elm and enter your login data.



The screenshot shows the standard login interface. At the top right is the Helsana logo with the tagline "Committed to life.". Below it, the word "Login" is displayed. There are two input fields: "Username" containing "Test456" and "Password" containing seven dots. A "Login" button is positioned to the right of the password field. Below the password field, there is a link for "Password forgotten" and a note: "You can [sign up here](#) if you don't have an account yet." At the bottom, there are links for "Help, information and instructions", "Data protection", and "Legal information". A blue callout box with a pointer to the "Login" button contains the text: "Please enter your login data and click on 'Login'."

You will then receive a TAN on the registered phone number and will be asked to enter it in the following window.



The screenshot shows the mTAN login interface. At the top right is the Helsana logo with the tagline "Committed to life.". Below it, the text "Login with mTAN" is displayed. A light blue notification bar at the top contains a warning icon and the text: "A security code has been sent to your mobile phone. Please wait for the message and enter the code below." with a close button (X). Below this is a "Security code" label and an input field containing "358303". To the right of the input field are "Cancel" and "Login" buttons. Below the "Login" button, there is a note: "If you haven't received the security code or if you accidentally deleted it, use this button to order a new one." and a "New Code" button. A blue callout box with a pointer to the "Login" button contains the text: "Please enter your security code and click on 'Login'."

If your login is successful, you will automatically be taken to the Portal.

Portal

Click a link below to access the corresponding application. Only accessible applications are displayed. If an application is missing, please contact the helpdesk.

Applications available



ELM - transmit your wage data



User Administration

Your profile

Manage your devices and personal data.



Change user data



Change mobile number



Edit Email Address



Password Change

Logout

4. Payroll data entry and transmission

The Portal now offers you various options. To enter your payroll data, please follow the instructions below.

Portal

Click a link below to access the corresponding application. Or application is missing, please contact the helpdesk.

Applications available



Your profile

Click on "ELM - transmit your wage data".

The Helsana Terms of Use will now be displayed.

de fr it en



Terms of Service

Scope

Helsana Accidents Ltd, Helsana Insurance Company Ltd and Helsana Supplementary Insurances Ltd offer their insured persons (corporate customers), sales partners and brokers with whom a cooperation agreement exists the possibility to manage payroll and headcount data online via the Helsana ELM Web online portal. These terms

Supplementary provisions

In addition to these general terms, use of Helsana ELM Web is subject to the [Privacy Policy](#) and [data processing policies](#) on the Helsana website.

User Guide Data pro

Please read them in their entirety and either accept or decline at the end.

An overview now appears of the declarations corresponding to the existing contracts.

1. Overview 2. Income totals 3. Further details 4. Transmit payroll data

Transmit income totals and portfolio report online

Declaration year 2022

Sector	Contract number	Period
Group Daily benefits insurance	 10	01.01.2022 - 31.12.2022

You can access the salary entry form by clicking on "Enter salaries".

Enter salaries

1. Overview 2. Income totals 3. Further details 4. Transmit payroll data

 KTG 10

Group Daily benefits insurance from 01.01.2022 to 31.12.2022

We kindly ask you to complete the information below, with any wages to be declared rounded to the nearest Swiss franc.

Group of people	Payroll Men	Payroll Women
AAR Arbeitnehmende		
Insured payroll Please note the maximum wage and payroll components according to the policy/SIC		
	CHF 0	CHF 0
	 Warning Payroll deviates by at least 30% from previous year	 Warning Payroll deviates by at least 30% from previous year

Previous page

You can now enter the actual contract payroll for the year indicated.

Then click on "Further details" to proceed to the next contract or to continue the process.

Further details

1. Overview 2. Income totals 3. Additional data 4. Payroll data summary

Additional data

EN: Ihre Kontaktdaten, damit wir Sie bei Rückfragen kontaktieren können

* mandatory fields

Family name: *

Test

First name: *

Anna

E-mail: *

test@helsana.ch

Phone: *

+41 78 222 2222

Previous page

Please enter your contact details and click on "Next page"

Next page

1. Overview 2. Income totals 3. Further details 4. Transmit payroll data

Transmit payroll data

You can view your details below and check them again. Then please click the button "Transmit payroll data".

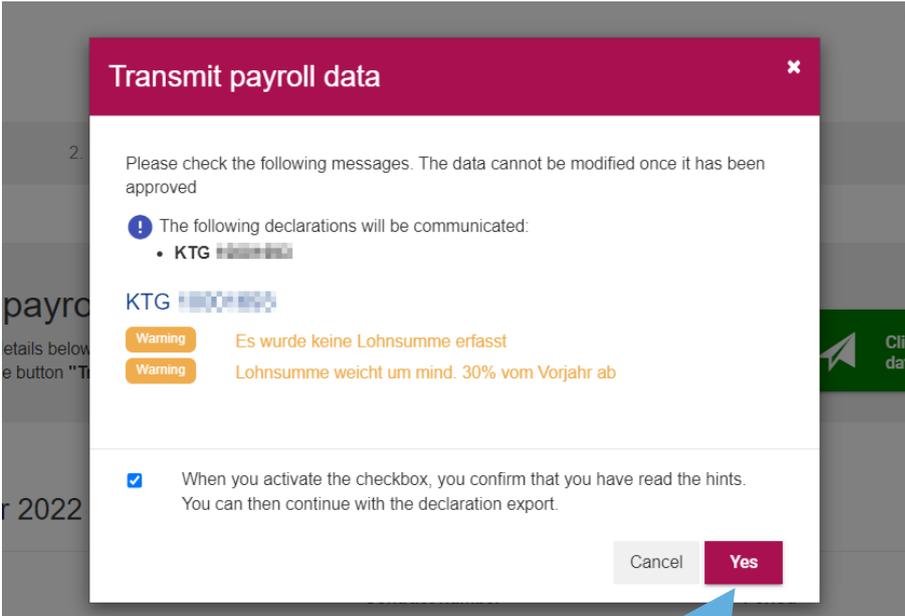
Click here for Payroll data transmission

Declaration year 2022

Then click on the green button to send your data to Helsana.

Sector	Contract number	Period
Group Daily benefits insurance	<input checked="" type="checkbox"/> 1000000	01.01.2022 - 31.12.2022

Previous page



Before the salaries are transmitted, a final information message appears. You must confirm that you have followed the instructions before you can finally transmit the salaries.

Once this is done, the following window will appear:

Transmit income totals and portfolio report online

Thank you for sending us your payroll data. We have just received it and will now process it. Below you will find a receipt in PDF format. Please save this receipt on your PC.

Declaration year 2022

Sector	Contract number	Period	Receipt
Group Daily benefits insurance	✔ 1 [blurred]	01.01.2022 - 31.12.2022	PDF

Replace

It is recommended to save the salary receipts on your computer (PDF).

To log out, please click on your username.
Then click on "Log off".

Transmit income totals and portfolio report online

Thank you for sending us your payroll data. We have just received it and will now process it.
Below you will find a receipt in PDF format. Please save this receipt on your PC.

Declaration year 2022

Sector	Contract number	Period	Receipt
Group Daily benefits insurance	 1	01.01.2022 - 31.12.2022	 PDF

[Replace](#)

5. Edit personal data

Applications available



ELM - transmit your wage data



User Administration

Here you have the option to change your name, mobile number, e-mail and password.

Your profile

Manage your devices and personal data.

 <p>Change user data</p>	 <p>Change mobile number</p>	 <p>Edit Email Address</p>	 <p>Password Change</p>
---	---	--	--

Logout

6. User Administration

Applications available



Under "User Administration", you can create new users and manage their rights.

Your profile

Manage your devices and personal data.



By clicking on "Create new user", you can create one or more users in your Helsana ELM-Web account.

Actions



The pencil is used to modify the user's data.

The trash can is used to delete the user's data.

The shield allows you to change the user's rights.

Assign roles

User: Mike Test / [redacted]@helsana.ch

Benutzerverwalter (inkl. Berechtigungsverwaltung)

ELM clerk

- The role "Benutzerverwalter" gives the right to manage other users
 - The role "ELM clerk" gives the right to transmit salaries
- *We recommend that you give both these rights to each user

8. Questions and uncertainties

If you have any questions, please contact the relevant Specialist Office. You can find the relevant contact details on any Helsana document.

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www.helsana.ch

If you have any questions, don't hesitate to contact the relevant Specialist Office at any time.