

## Helsana ELM-Web User Manual



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# 1 Introduction

This user manual describes the most important functions of the web portal "Helsana ELM Web" 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



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



**Please note** that **caution** is advised with these functions. Please take special care when using this function.

## 2 Registration

The following browsers can be used for payroll declarations via "Helsana ELM Web":

- Firefox v54.0
- Chrome v60.0
- Edge v14.0
- Safari v7.0

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

[www.helsana.ch/elm](http://www.helsana.ch/elm).

Click on "Registration" to go to the necessary page.

de fr it en

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### Login

User name

Password

[Forgot password](#)

[User Guide](#) [Data protection](#) [Legal information](#)

You need to register before submitting your first declaration via "Helsana ELM Web".  
**Click on "Registration"** to go to the necessary page.

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

## Register New User

Please complete the fields to register for our service.

<b>First name *</b>	Anna
<b>Last name *</b>	Test
<b>Email address *</b>	anna.test@helsana.ch
<b>User Name (e.g. company name) *</b>	Testcompany
<b>Registration number *</b>	123456789
<b>Invoice number *</b>	9876543210

\* = Required field

Next

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You will have received your registration number along with our request to submit a payroll declaration. Please refer to one of the most recent advance payment statements for the advance payment invoice number.

[de](#) [fr](#) [it](#) [en](#)**Helsana**  
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## Register New User

Please complete the fields to register for our service.

<b>First name *</b>	<input type="text" value="Anna"/>
<b>Last name *</b>	<input type="text" value="Test"/>
<b>Email address *</b>	<input type="text" value="anna.test@helsana.ch"/>
<b>User Name (e.g. company name) *</b>	<input type="text" value="Testcompany"/>
<b>Registration number *</b>	<input type="text" value="123456789"/>
<b>Invoice number *</b>	<input type="text" value="9876543210"/>

\* = Required field

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

## Register New User

Please choose a user name and a password.

**Choose user name**

Testcompany

**Choose password \***

**Repeat password \***

\* = Required field

Back

Next

The password must be at least 8, maximum 30 characters long and must contain at least one letter and one number.

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In the next window you can set a password.  
The password must meet the following criteria:

- Minimum 8 characters
- Maximum 30 characters
- At least one letter
- At least one number

## Register New User

Please choose a user name and a password.

**Choose user name**

Testcompany

**Choose password \***

.....

**Repeat password \***

.....

\* = Required field

Back

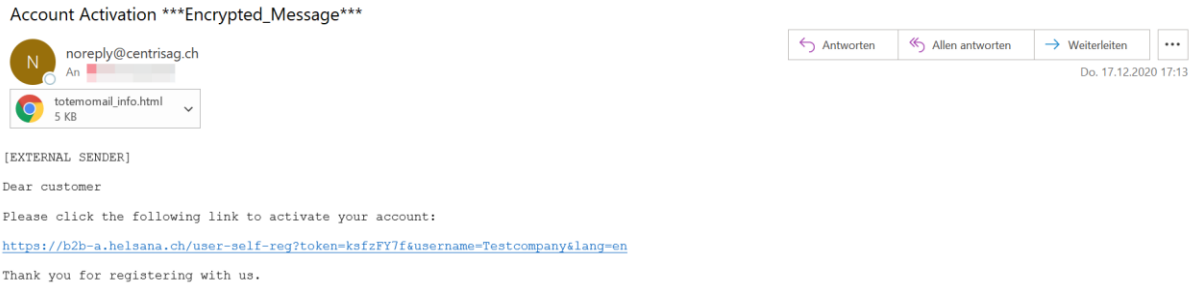
Next

The password must be at least 8, max. 30, characters long and must contain at least one letter and one number.

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After entering a password, click on "Next".

You will then receive an email at the email address you provided, including a link for confirmation or activation.

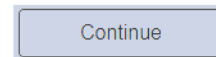


When you click on the link, the system will inform you that a mobile phone number is required for you to receive mobile TAN codes (via SMS).



### Migration to Mobile TAN (SMS)

To enhance security, you have to migrate to the new login procedure using mTAN (involving SMS messages). Please click the button "Continue". You will be guided through the necessary steps.



User Guide Data protection Legal information

The following image will appear. Click on "Continue".



de fr it en



## Register Mobile Phone

Authentication using your mobile phone has been chosen for your account. To activate your user account, please enter your mobile phone number (e.g. +41791234567).

**User name:** Testcompany

**Mobile phone number:**

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The user name is now already preset. Enter your mobile number and click on "Register".

You will receive the code on your mobile phone shortly afterwards.

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## Confirm Mobile Phone Number

In a few moments you should receive a security code via SMS. To confirm your mobile phone number, please enter this security code.

**User name** Testcompany

**Mobile phone number:** +4179:

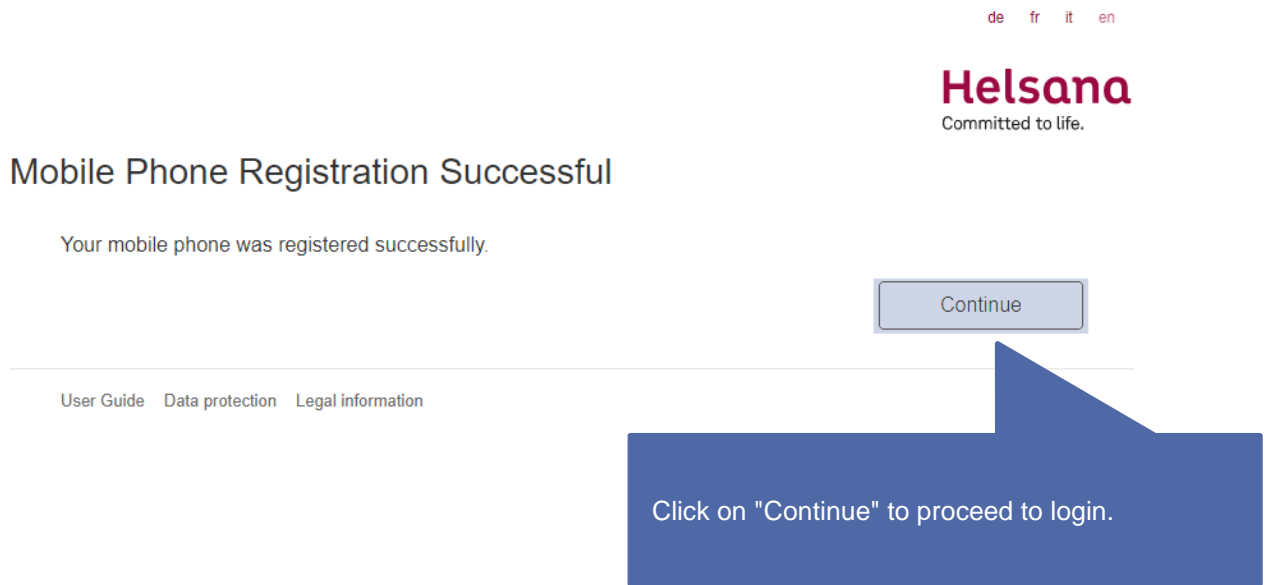
**Security code:**

If you haven't received the security code or if you accidentally deleted it, use this button to order a new one.

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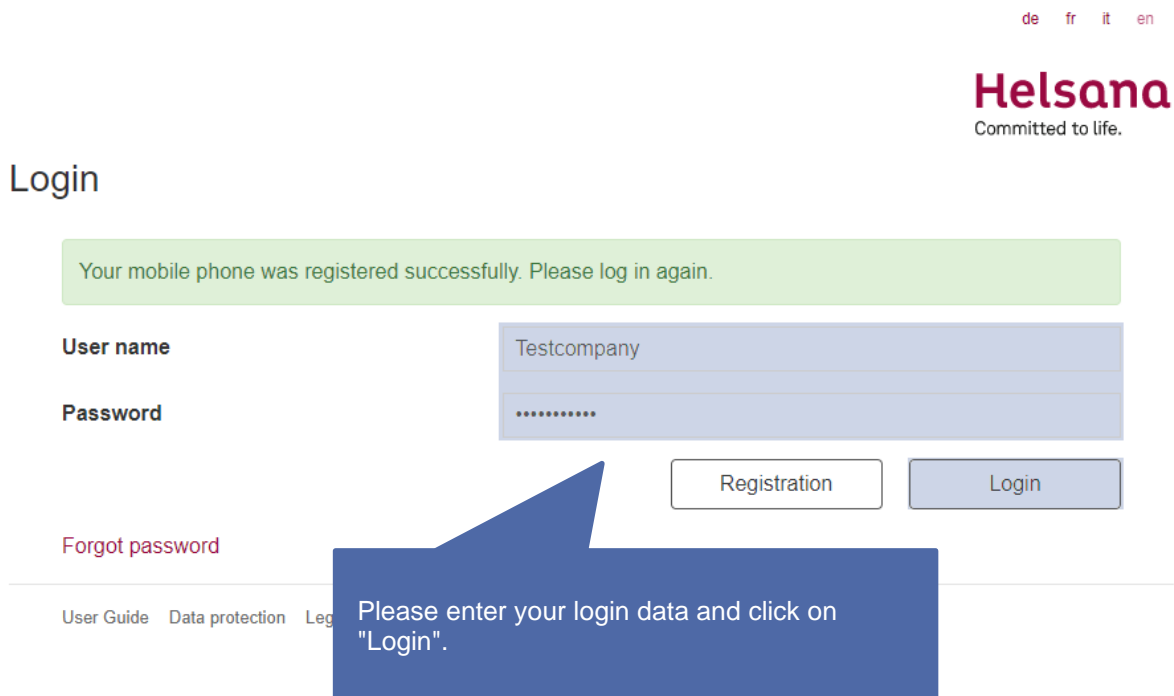
Please enter the security code and click on "Confirm".

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

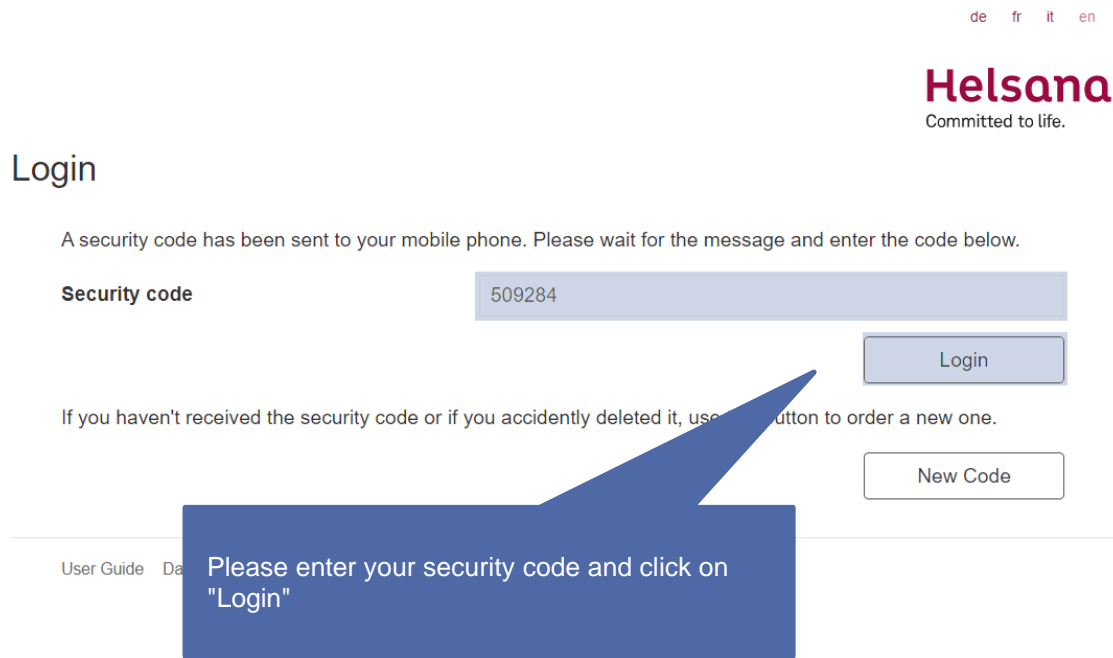


### 3 Login via the homepage

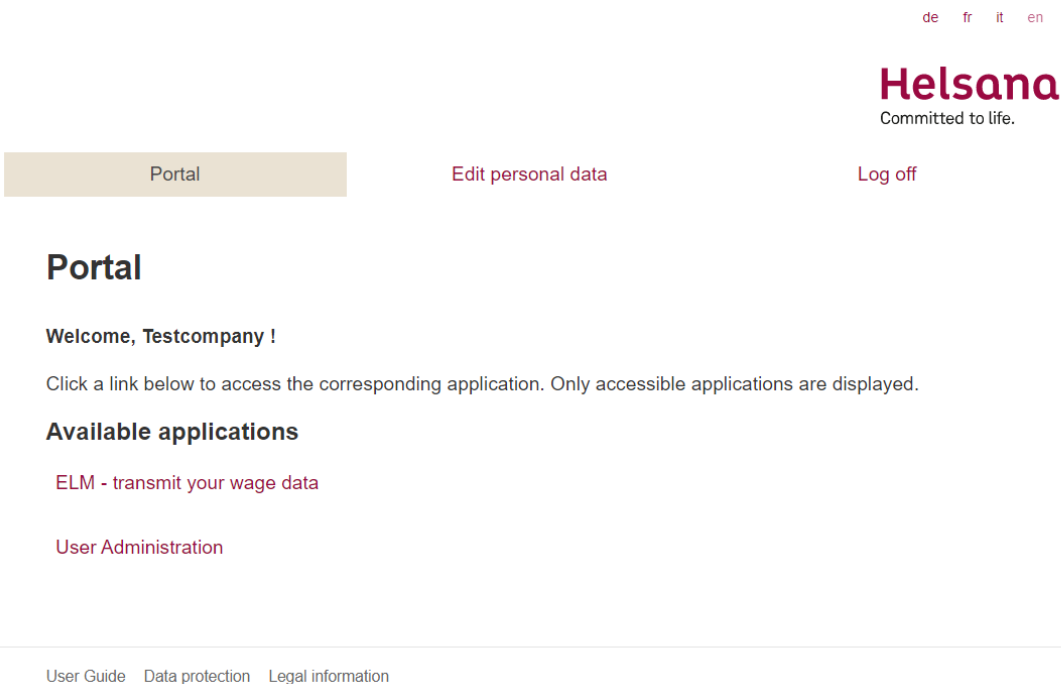
Once you have registered, you can log in normally on all subsequent occasions. Go back to the homepage [helsana.ch/elm](https://helsana.ch/elm) and enter your login data.



You will then receive the TAN at the registered phone number and will be prompted to enter it in the following window.



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



## 4 Payroll data entry and transmission

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

de fr it en

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Portal Edit personal data Log off

### Portal

Welcome, Testcompany !

Click a link below to access the corresponding application. Only accessible applications are displayed.

#### Available applications

ELM - transmit your wage data

User Administration

Please click on "ELM – Transmit your wage data".

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The Helsana Terms of Use will now be displayed.

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## 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.

Decline Accept

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Please read them in their entirety and either agree or disagree at the end.

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

EN Help Testvertrag

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

### Transmit income totals and portfolio report online

Sector	Contract number	Period
Group Daily benefits insurance	✓ 100	
Group Accident insurance	✓ 100	
Group Accident insurance	✓ 100	

**Enter salaries**

EN Help Testvertrag

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

1 KTG 100 2 UVG 100 3 UVGZ 100

### Group Daily benefits insurance from 01.01.2020 to 31.12.2020

le eventuali somme dei salari da dichiarare sono da arrotondare al franco intero.

Group of people	Payroll Men	Payroll Women
AAR Dipendenti		
Insured payroll Please note the maximum wage and payroll components according to the policy/SIC	CHF 49 000	CHF 60 000

**Previous page**

**Next page**

You can now enter the effective payroll total for the contract for the specified year. Then click on "Next page" to go to the next contract.



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

✓ KTG 100    ✓ UVG 100    3 UVGZ 100

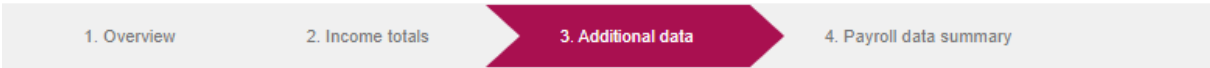
### Group Accident insurance from 01.01.2020 to 31.12.2020

Group of people	Payroll Men	Somma salariale Donne
<b>ZAAR Dipendenti</b>		
Compulsory occupational accident UVG BU Employee payroll up to CHF 148200 per person and year	CHF 49'000	CHF 60'000
Compulsory non-occupational accident UVG NBU	CHF 49'000	CHF 60'000

Previous page

Additional data

Please enter all payroll data for all your contracts and click on "Additional data"



## Additional data

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

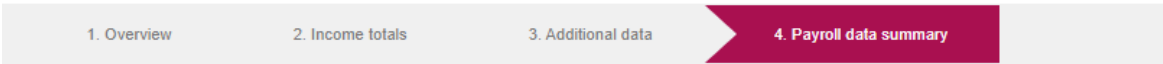
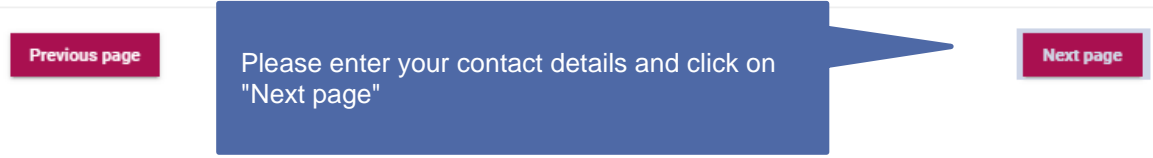
\* mandatory fields

Family name: \*

First name: \*

E-mail: \*

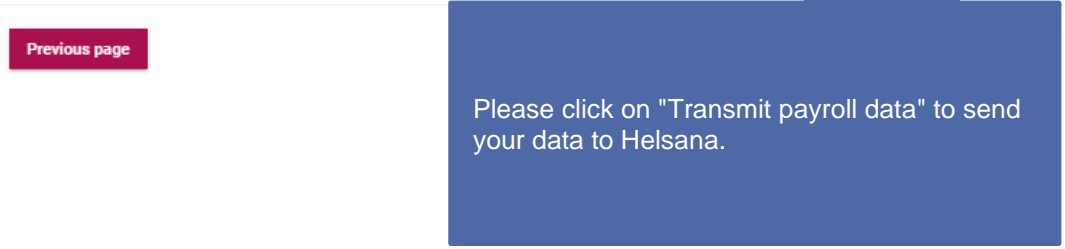
Phone: \*

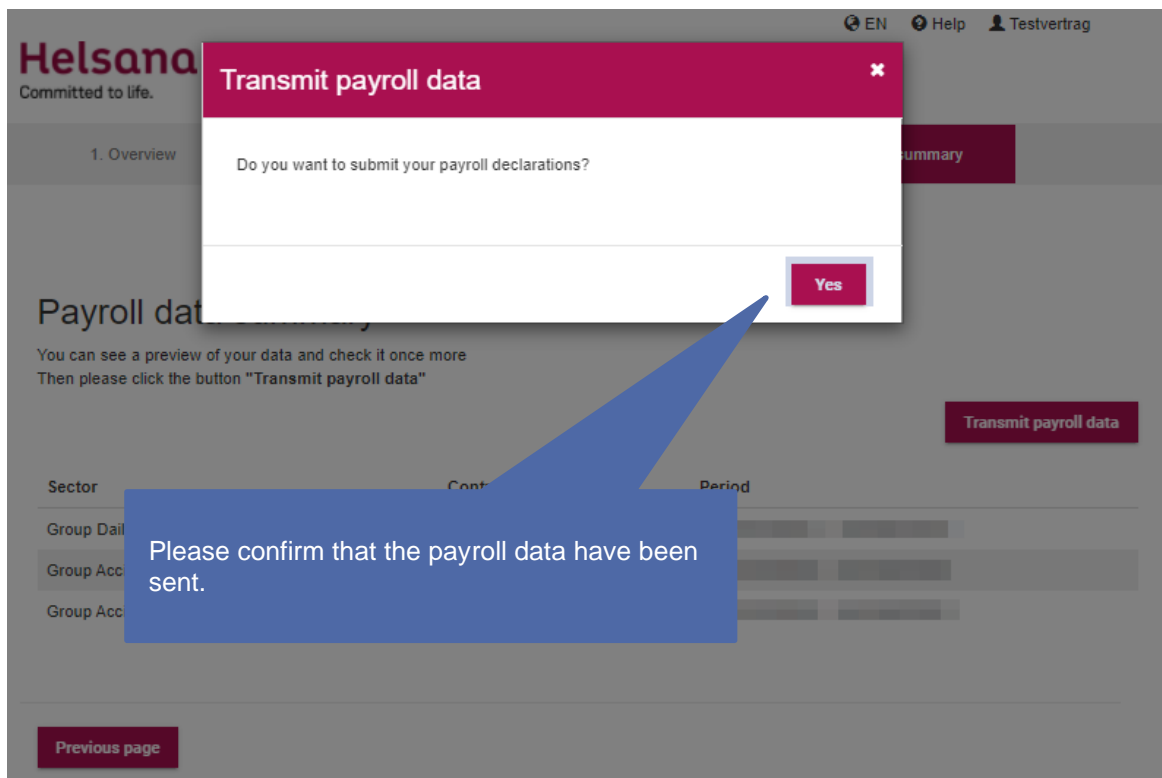


## Payroll data summary

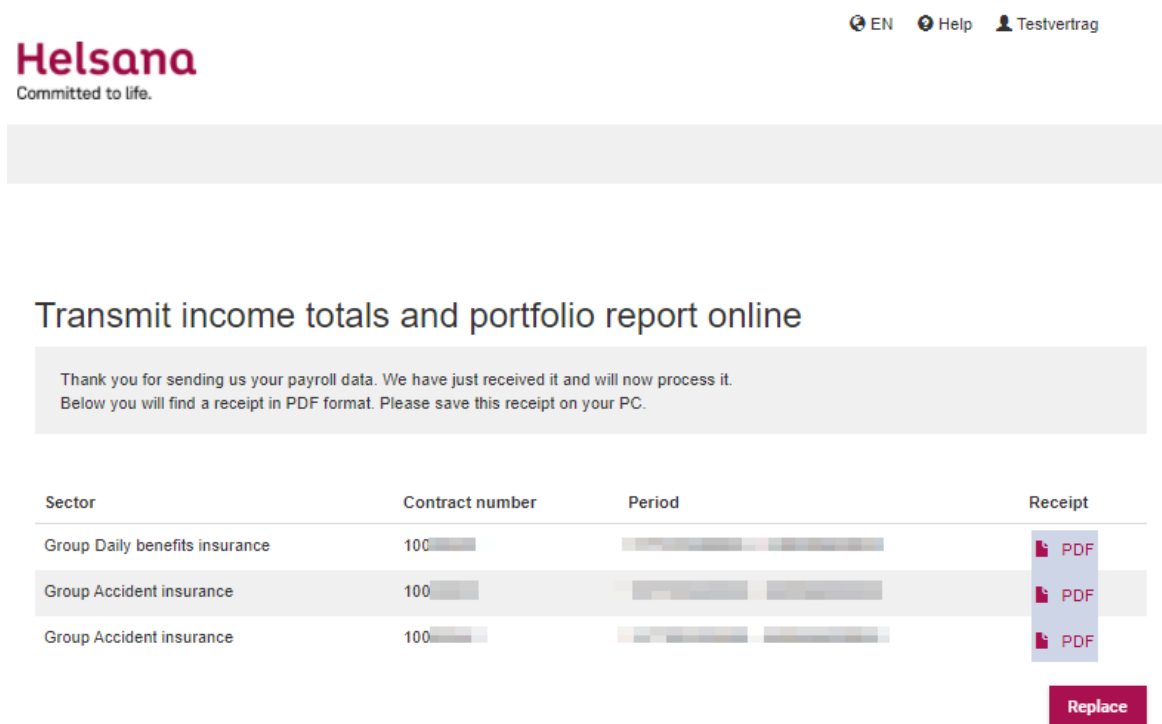
You can see a preview of your data and check it once more  
Then please click the button "Transmit payroll data"

Sector	Contract number	Period
Group Daily benefits insurance	✓ 1000	
Group Accident insurance	✓ 1000	
Group Accident insurance	✓ 1000	





Once this is done, the following window will appear:



You now have the option of reopening the entered payroll data as a PDF file.



Then you can log off:

The screenshot shows the Helsana ELM Web Declaration interface. At the top left is the Helsana logo with the tagline 'Committed to life.'. At the top right, there are navigation links for 'EN', 'Help', and 'Testvertrag'. A 'Log off' button is highlighted with a mouse cursor. A blue callout box points to the 'Log off' button with the text: 'To log out, please click on your username. Then click on "Log off".'. Below the navigation bar, there is a heading 'Transmit income totals and portfolio report online' and a message: 'Thank you for sending us your payroll data. W Below you will find a receipt in PDF format. Ple'. Below this is a table with columns 'Sector' and 'Receipt'. The table lists three rows of insurance data, each with a '100%' progress indicator and a 'PDF' link. A 'Replace' button is located at the bottom right of the table area.

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EN Help Testvertrag

Log off

### Transmit income totals and portfolio report online

Thank you for sending us your payroll data. W  
Below you will find a receipt in PDF format. Ple

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

Sector	Receipt
Group Daily benefits insurance 100%	PDF
Group Accident insurance 100%	PDF
Group Accident insurance 100%	PDF

Replace

## 4.1 Potential warning or error messages

If the system detects potential errors, you will receive a warning or even an error message.

The screenshot shows the Helsana ELM Web Declaration interface. At the top, there is a navigation bar with the Helsana logo and the tagline "Impegnata per la vita." On the right, there are links for "EN", "Help", and "Testvertrag". Below the logo, there is a progress bar with four steps: "1. Overview", "2. Income totals" (highlighted in red), "3. Additional data", and "4. Payroll data summary".

Below the progress bar, there are three numbered steps: "1 KTG 100", "2 UVG 100", and "3 UVGZ 100".

The main content area is titled "Group Daily benefits insurance from 01.01.2020 to 31.12.2020". Below the title, there is a note: "le eventuali somme dei salari da dichiarare sono da arrotondare al franco intero." Below this, there is a table with three columns: "Group of people", "Payroll Men", and "Payroll Women".

Group of people	Payroll Men	Payroll Women
AAR Dipendenti	CHF 49'000	CHF 10'000

Below the table, there is a warning message: "Warning Somma salariale devia di almeno il 30% rispetto all'anno precedente".

At the bottom of the page, there are two buttons: "Previous page" and "Next page".

A red callout box points to the warning message with the following text: "Please take care to check your payroll data again. If the payroll data are entered correctly, the warning message can be ignored."

## Transmit payroll data ✕

Please check the following messages. The data cannot be modified once it has been approved

KTG100 ██████████

Warning

Somme salariale diffère d'au moins 30% par rapport à l'année précédente



When you activate the checkbox, you confirm that you have read the hints. You can then continue with the declaration export.

Cancel

Yes

When you send the payroll data, the system will remind you that it has detected a deviation. Please confirm that the deviation is okay by clicking in the box.

Then click on "Yes" to send the payroll data.

## 5 Questions and clarifications

If you have any questions, please contact the agency responsible for you.

You can find the relevant contact details on any Helsana document.

**Helsana Supplementary Insurances Ltd.**

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Broker Account Management  
Postfach  
8081 Zürich Helsana

+41 58 340 17 14  
broker.service@helsana.ch  
www.helsana.ch

# Helsana

**A-Priority**

Post CH AG

17 December 2020

If you have any questions, don't hesitate to contact the agency responsible for you at any time.

UID  
Contract holder  
Contract number