MILK STORK EMPLOYER DASHBOARD SOFTWARE GUIDE

This is your command center for managing your company's Milk Stork benefit. Here, you can customize your Employee Portal's benefit options, employee access, and branding. You can also access all of the resources needed to launch and promote the benefit to your employees.

More than just a management tool, your Benefits Administrator Dashboard also gives you powerful insights into how your employees are using their Milk Stork benefit, helping you champion a workplace that truly supports working parents. Here's how to get started!



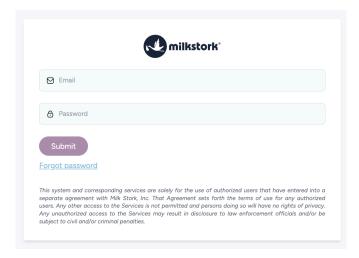
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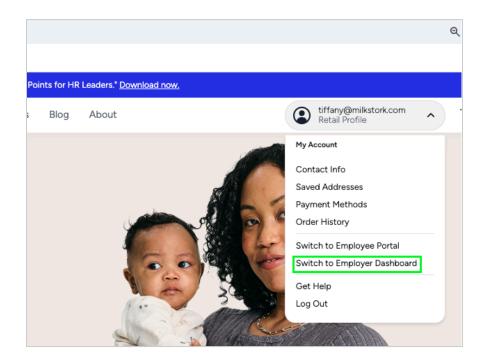
Logging In

There are multiple ways to find your Benefits Administration Dashboard:

1. Go to https://admin.milkstork.com and add in your credentials. Use your work login that is associated with your admin user account.

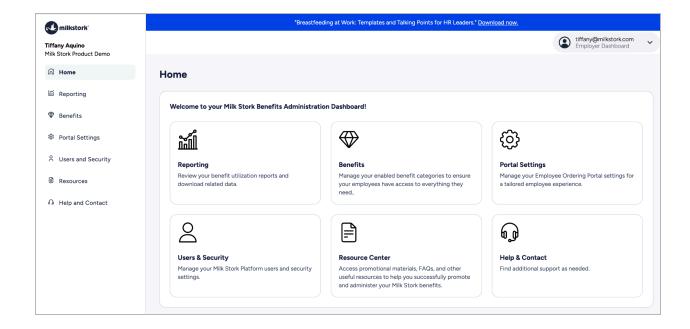


2. Go to www.milkstork.com and navigate to your "Employer Dashboard" via your drop down profile menu on the top right.



Home

Upon login, you'll be taken to your Benefits Administration Dashboard Home page. This is also referred to as your "Employer Dashboard" in the navigation menu for short. This page provides details on the features of each page in the Dashboard to help you get started.



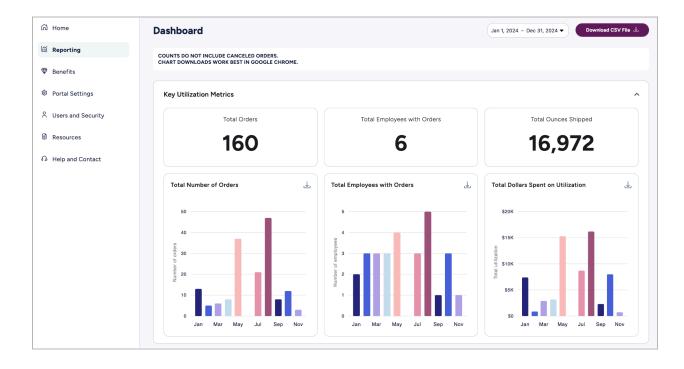
Reporting

The Reporting page provides real-time insights into your benefit utilization trends. The features available on this page depend on the SaaS tier your company is currently subscribed to.

- Essentials Tier: You'll have access to Key Utilization Metrics.
- **Signature Tier:** You'll have access to Key Utilization Metrics, Advanced Utilization Insights, and Utilization Trends Over Time.
- Premier Tier: You'll have access to Key Utilization Metrics, Advanced Utilization Insights, and Utilization Trends Over Time, Utilization Comparisons, and Satisfaction & Support Insights. You'll also have priority access to any new features released on this and other Dashboard pages.

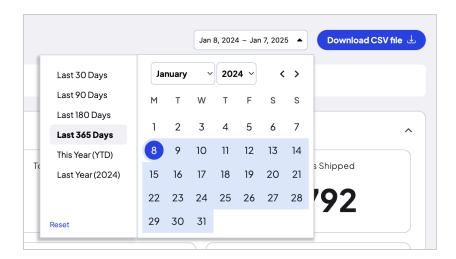
All users will have access to view different date ranges and download a CSV file of your raw utilization data.

This **Key Utilization Metrics** section is available with all subscription tiers. This reporting provides an overview of your program's key performance metrics, including total orders, total employees, and total ounces shipped. Interactive charts allow you to visualize data trends for orders, employees, and utilization spending over time, with the flexibility to adjust the date range using a dynamic date picker.

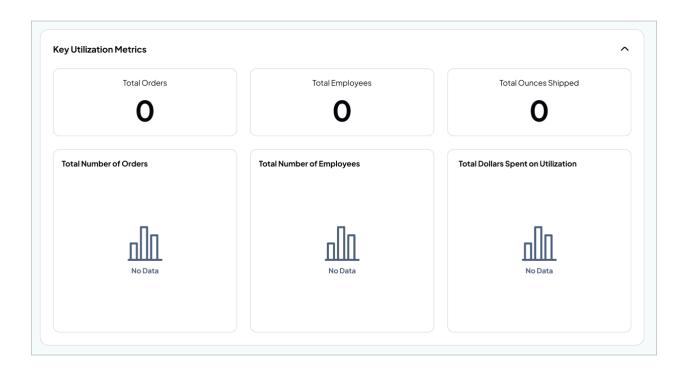


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When you login, if you see 0 total orders, this means your company's users have not placed any Milk Stork orders within the currently selected **date range**. Try changing the dates to see different data points. You can choose predefined options, like "Last 30 Days," or customize your timeframe.



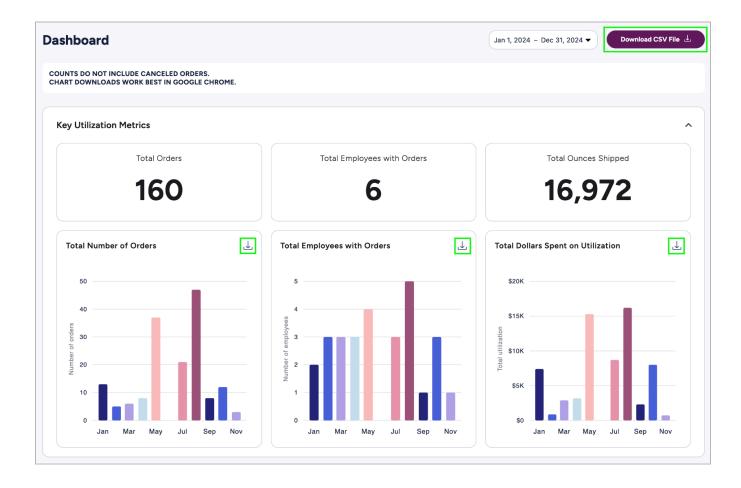
For first-time clients with no utilization data, the **Key Utilization Metrics** section will open by default and display clear **"No Data"** messages in all relevant areas. This ensures transparency and helps you get familiar with the dashboard's functionality.



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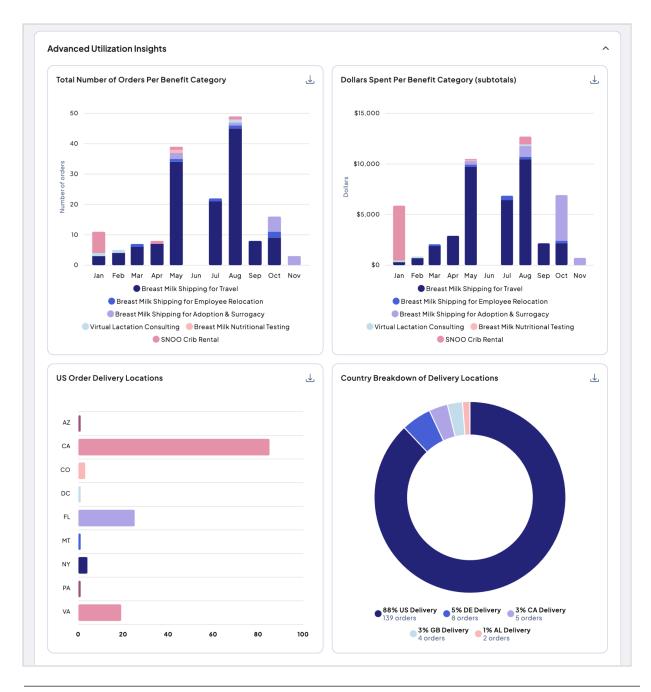
Export data visualizations as PNG files for presentations by clicking the download button at the top right corner of each graph.

You can download raw data in CSV format for deeper analysis. Click the "Download CSV file" button at the top right corner of the page. Even without data, the Download CSV button remains active, allowing you to generate a file with headers to preview the report format. This ensures you're ready to navigate and make the most of its features as data becomes available.



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The **Advanced Utilization Insights** section is available to Signature and Premier subscription tier users. This reporting provides detailed breakdowns of the performance of your benefits program. You can access charts that display the total number of orders and dollars spent per benefit category, as well as delivery locations segmented by U.S. state and country. Additionally, unique checkout questions are presented in graphs and tables, showcasing responses to multiple-choice and open-ended questions added during the checkout process. All charts and tables are equipped with downloadable options, allowing you to easily share insights and conduct further analysis.



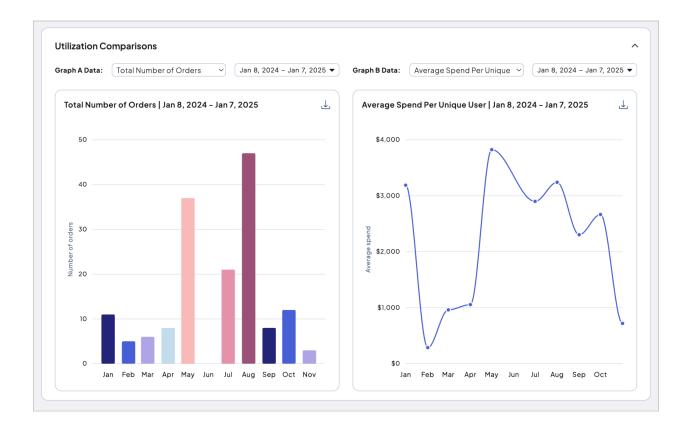
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The **Utilization Trends Over Time** section is available to Signature and Premier subscription tier users. This reporting allows you to track and analyze how utilization patterns evolve, providing valuable insights to support strategic planning. Visualizations include the average number of orders per unique user, average spend per unique user, and spending trends based on checkout questions. With customizable date ranges, you can compare trends across specific time periods to uncover meaningful patterns. Additionally, you can export trend charts as PNG files for presentations or download raw data for offline analysis, making it easy to share and act on these insights.

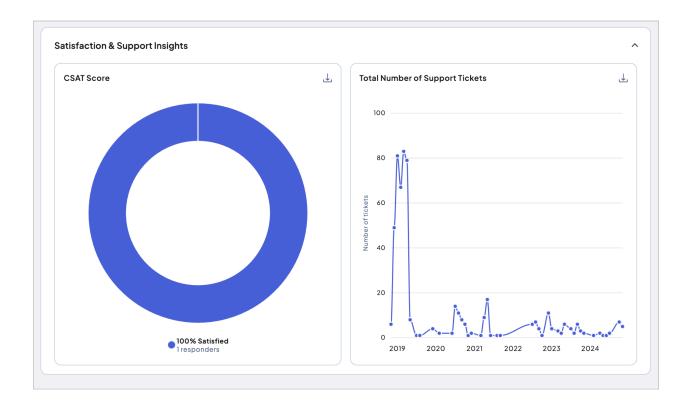


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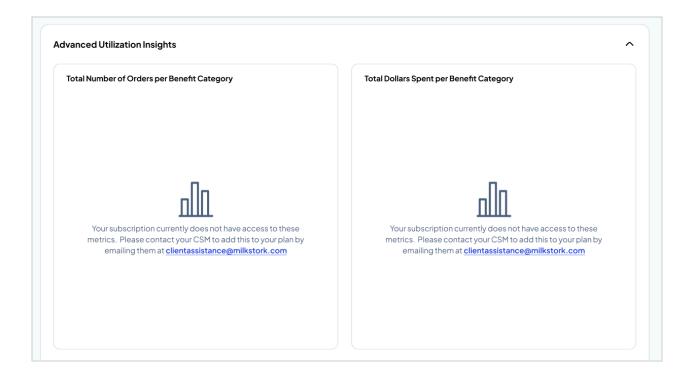
The **Utilization Comparisons** section is available to Premier subscription tier users. This equips you with advanced tools to support informed decision-making. It allows you to compare two data sets side by side, selecting metrics such as total orders, total dollars spent, or average spend per user. You can visualize data for chosen timeframes using bar or line charts and customize your analysis by toggling between data sets and adjusting date ranges, ensuring tailored insights to meet your specific needs.



The **Satisfaction & Support Insights** section is available to Premier subscription tier users. This reporting provides valuable metrics to help you understand employee satisfaction and support interactions. Key metrics include CSAT (Customer Satisfaction) scores - which display satisfied versus unsatisfied ratings - and resolved support tickets, allowing you to analyze trends over time. Additionally, you can export graphs as PNG files for reporting purposes, ensuring you have the tools needed to monitor and share these insights effectively.

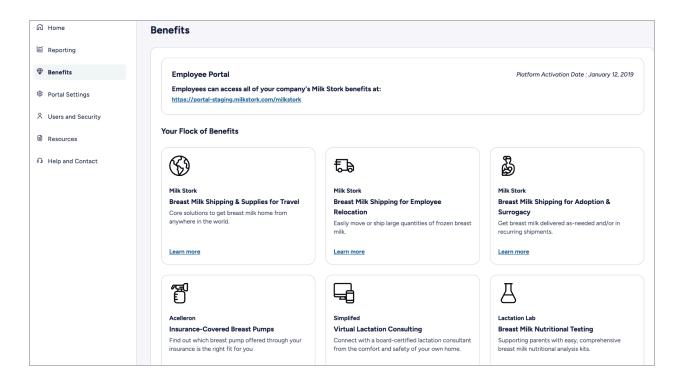


If you don't have access to certain reporting sections, a **"No Access"** message will appear in place of the data visualization. This message includes details about the restricted access and provides contact information to request access or support. If you see this message, it is because your current platform subscription does not include these features. You can use the provided links to quickly connect with the appropriate team for assistance.



Benefits

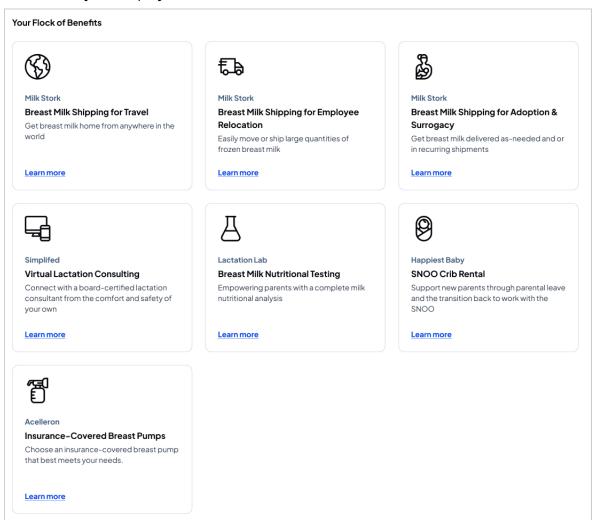
To see and configure your Employee Portal link and specific benefit categories enabled for your employees, click on the Benefits menu option on the left-hand side. Benefits are grouped into categories of products offered by Milk Stork based on the primary purpose of use. For example, the *Breast Milk Shipping for Employee Relocation* benefit category includes products like the Stash, which are used to carry or ship large quantities of breast milk.



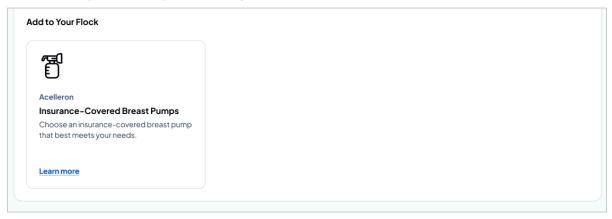
At the top of the Benefits page, you'll see an Employee Portal link - clicking on this link will take you to your employees' Ordering Portal view. This is the unique portal link for your company that you can provide directly to your employees to access Milk Stork benefits.



Below the Employee Portal link, you'll find listed the benefit categories which are enabled and available for your employees to access under "Your Flock of Benefits".

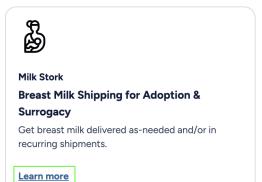


Under "Add to Your Flock" you'll see additional benefits Milk Stork offers that are not yet turned on in your Employee Ordering Portal.



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For any benefit category, **click on "Learn more"** to view detailed information of that category's products.



← Back to benefits



Breast Milk Shipping for Adoption & Surrogacy

Milk Storl

For families receiving breast milk from a surrogate, birth mother, or milk donor, Milk Stork makes it fast and easy to send and receive batches of milk on a recurring basis using our high-capacity, medical-grade, and reusable Stash cooler.

Employees can choose from any of the following options that best suits their family's needs:

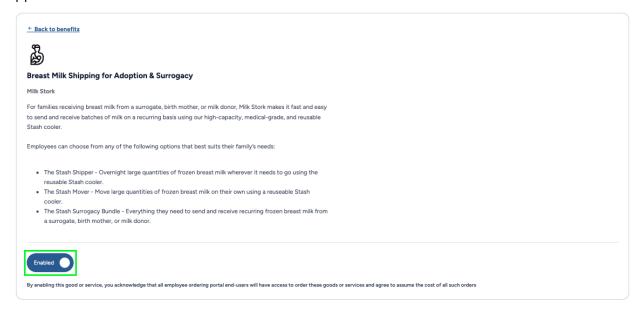
- The Stash Shipper Overnight large quantities of frozen breast milk wherever it needs to go using the reusable Stash cooler.
- The Stash Mover Move large quantities of frozen breast milk on their own using a reuseable Stash cooler.
- The Stash Surrogacy Bundle Everything they need to send and receive recurring frozen breast milk from a surrogate, birth mother, or milk donor.

Enabled

For assistance in configuring your benefits, please contact your CSM at clientassistance@milkstork.com.

The benefit categories are enabled based on your subscription tier and contract selections. If your subscription tier and user type does not allow for control of this, you can contact your Client Success Manager to turn them on for you. Ensure you are ready to make this change before doing so, as enabling a benefit category will immediately update the Employee Ordering Portal and make these products available for your employees to order.

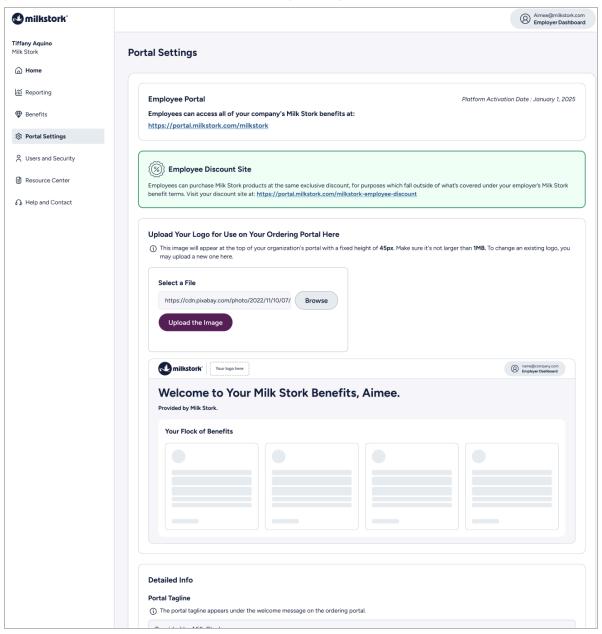
For **Premier subscribers**, benefit categories may be enabled or disabled at any time on this page by a **Super Admin user**. If you have rights to edit a benefit category, a toggle button will appear.



Employee Portal Settings

Navigate to the Portal Settings page to customize branding, messaging, and terms your employees will see when they login to their Employee Ordering Portal and before placing an order. **Super Admin users** have permission to edit the portal settings on this page. **Admin users** have permission to view the portal settings on this page.

At the top of this page, you will again see the link to your unique Employee Ordering Portal. If you have an Employee Discount Site enabled for discounts on Milk Stork products not offered in your covered benefit, this will also be displayed for you here.



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Add a company logo here to display at the top of your Employee Ordering Portal to provide employees with a professional interface that clearly shows them they're in the right place to use their benefits.

Steps to Upload Your Logo

- 1. Click the Browse button under the **Select a File** section.
- 2. Choose an image file from your computer.
- 3. Ensure the logo is designed to fit the specified size (details below).
- 4. After uploading, the preview below the logo upload section will update to display your logo.

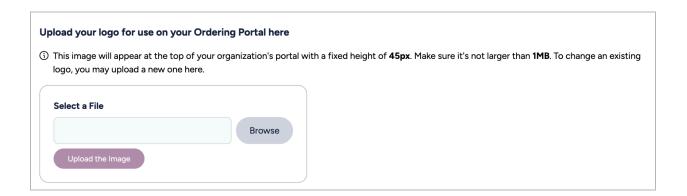


Photo Specifications

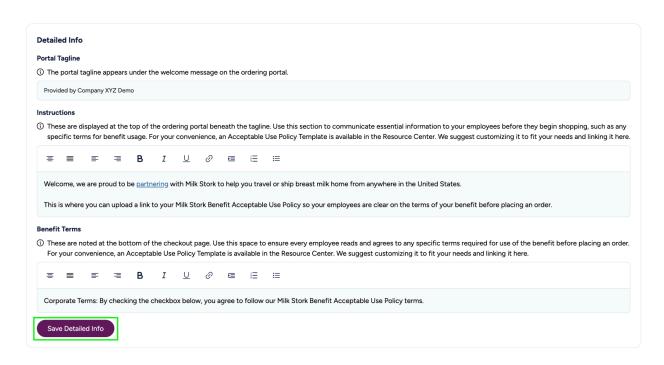
When preparing your logo or banner image, follow these guidelines:

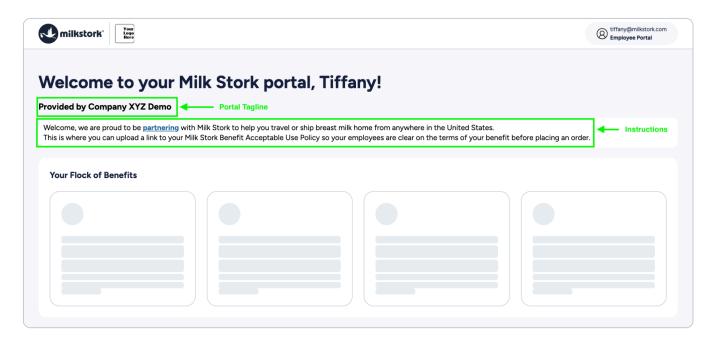
- **Image Size:** The height is fixed at **45px**.
- File Size: Must not exceed 1MB.
- Format: Accepted file formats include .PNG, .JPG, and .SVG. Unsupported formats include HEIC, TIFF, and others.

Under the logo upload and Portal preview sections, the **Detailed Info** section allows configuration of your Portal Tagline, Instructions, and Benefit Terms.

- **Portal Tagline:** appears under the welcome message on the ordering portal.
- **Instructions:** display on the ordering portal beneath the tagline. Use these to provide guidance to employees before they place an order.
- **Benefit Terms:** display at the bottom of the checkout page before the employee places an order. You can repeat instructions here or add any additional terms and conditions you want every employee to agree to before placing an order.

As you update this section, the changes will appear in your preview above so you can easily see how it will look on the live Employee Ordering Portal site. Be sure to click the "Save Detailed Info" button once you've made changes.

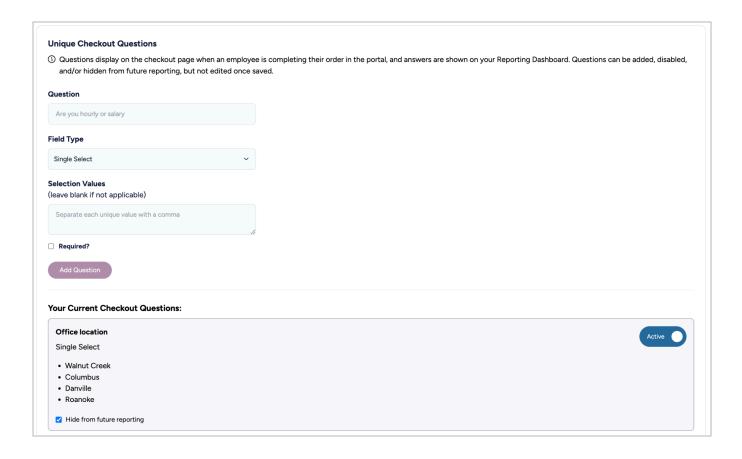




Under the Detailed Info section, the **Unique Checkout Questions** allows configuration of any specific questions you choose to ask your employees before they place an order. Use this feature to collect unique data relevant to administering your benefit.

Questions added here can be:

- Viewed or hidden from reporting at any time.
- Activated or disabled at any time.
- Formatted as single select, short text, or long text. If using a single select question, be sure to separate unique values with a comma, such as "Walnut Creek, Columbus, Danville, Roanoke" in the Selection Values box.

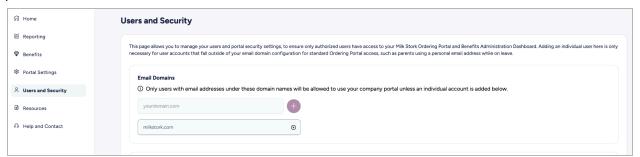


Users and Security

The **Users and Security** section is designed to help you manage and control access to your organization's Milk Stork benefits portal. Depending on your company's Personally Identifiable Information (PII) access policies and whether you utilize Single Sign-On (SSO), **Super Admin users** typically have permission to edit the settings on this page. **Admin users** typically have permission to view the settings on this page.

As a **Super Admin with PII access and without SSO enabled**, this page allows you to add new users, adjust permissions, and monitor account statuses, ensuring that only authorized individuals can access and order on your Ordering Portal. By effectively managing user roles and access, you can maintain security and streamline portal usage for your team.

Email Domains can also be added here to provide access to additional users on your employee portal.



View Existing Users

If you have permission to view PII, you will be able to view existing individual users who have previously logged into your Milk Stork Employee Ordering Portal or have been added here individually. Please note that anyone with an email address from your approved email domain will be able to access your Employee Ordering Portal, regardless of if their individual information is shown here. A list of all users associated with your organization is displayed here, including their user type and account statuses.

User Types:

- Standard Users: These users have limited permissions, such as placing and viewing orders on the Employee Ordering Portal. Individual Standard Users can be added on this page.
- Admin Users: These are read-only users that have administrative permissions, including access to the Benefits Administration Dashboard to view reports, portal settings, and the user list. They cannot add or edit individual accounts or change portal settings. Admin Users must be added by contacting your CSM.

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 Super Admin Users: These users have full permissions, including access to all Benefits Administration Dashboard features, changing portal settings, and managing individual accounts. Super Admin Users must be added by contacting your CSM.

For assistance in managing your users, making system-wide changes, enabling or disabling access to PII, or adding a new Admin or Super Admin to your account, please contact your CSM at clientassistance@milkstork.com.

Account Status:

- Active accounts have an email that has been verified, and can place orders and see past order history by logging into their account at milkstork.com.
- Email Not Verified accounts have received an individual invitation to login to your Employee Ordering Portal, but have not yet verified their email address.
 They cannot login to see past orders or place new orders.
- User Disabled accounts have been disabled by a Milk Stork Org Administrator, such as your Client Success Manager. They cannot place orders or login to see past orders. Contact your Client Success Manager with any questions.
- Read Only accounts can login to see past orders, but cannot place new orders.

Toggle buttons to activate or set users to read only status are only available for Super Admins with PII access. Admin users with PII access will simply see account statuses without the ability to change them.

Your Organization's Users

If you have permission to view Personally Identifiable Information (PII), you will see a list below of individual users who have access to your Employee Portal and/or Employer Dashboard.

- Standard Users: These users have limited permissions, such as placing and viewing orders. Individual Standard Users can be added on this page.
- Admin Users: These users have administrative permissions, including access to the Benefits Administration Dashboard to view reports, view
 portal settings, and view the user list. They cannot add or edit individual accounts. Admin Users must be added by contacting your CSM.
- Super Admin Users: These users have full permissions, including access to all Benefits Administration Dashboard features and managing individual accounts. Super Admin Users must be added by contacting your CSM.

For assistance in making system-wide changes, enabling or disabling access to PII, or adding a new Admin or Super Admin to your account, please contact your CSM at clientassistance@milkstork.com.

+ Add Standard User

Aquino, Tiffany	Active
Milk Stork Super Admin	
iffany@milkstork.com Status: Place Orders ⊘ See Past Orders ⊙	
Status: Place Orders See Past Orders	
Harris, Aimee	
Milk Stork Admin	Email Not Verified ①
clientassistance@milkstork.com	Resend link
Status: Place Orders 🗵 See Past Orders 🗵	
User, Test	
Standard User	User Disabled ③
test@milkstork.com	
Status: Place Orders 🕙 See Past Orders 😵	
Test, User	Read Only
Standard User	

Add a New User

Super Admins with access to PII and without SSO enabled can add new Standard Users for unique circumstances. This is most commonly used with individuals going out on parental leave requiring access to the benefit from an email address outside of the approved email domain (such as a personal Gmail account).

- Click the + Add Standard User button at the top of the page.
- Enter the new user's name, email address, and assign the appropriate role (Admin or Standard User).
 - **Be certain that you have authorization to add a standard user to your portal before doing so as they will have permission to place orders on your portal.
- Once added, the user will receive an invitation to verify their account.

Account Verification

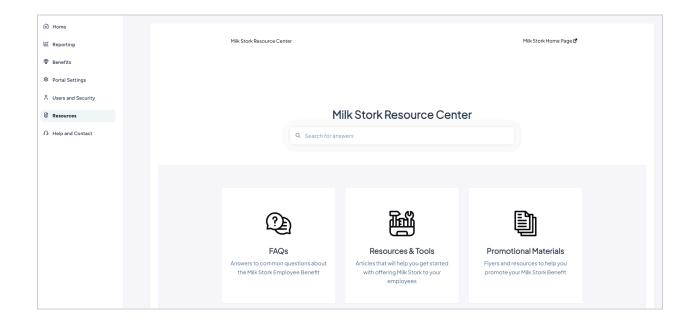
- Users with a **(Not verified)** status need to complete the email verification process before accessing the portal. You can prompt them to look for an email from Milk Stork to verify their account.
- You can click "Resend Link" here to send the invitation again to their email address.
- If a user encounters issues accessing their account, they can reach out to the Milk Stork Customer Care team for support by submitting a ticket here: https://support.milkstork.com/hc/en-us

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Resources

Navigating the Milk Stork Resource Center

Click on "Resources" to navigate to The Milk Stork Resource Center – your go-to hub for all the tools and information you need to administer your Milk Stork benefit and support your employees in utilizing Milk Stork products. The center provides a self-service platform where you can quickly find answers to common questions, download helpful material, and access tools you can use to promote your Milk Stork benefits.



What You'll Find in the Resource Center

1. Frequently Asked Questions

*FAQs: are divided into two clear categories:

a. FAQs for Employers - Administering Your Benefits:

This section is dedicated to provide articles and guidance on how to effectively manage and administer your Milk Stork benefits. It includes step-by-step instructions, best practices, and solutions to common challenges, ensuring a smooth experience for you and your team.

b. Common Employee FAQs:

This section is tailored for employees, offering articles with answers to their most frequently asked questions. Employees can quickly find solutions to their questions, reducing the need for additional support and saving you time.

2. Resources & Tools

- a. A library of articles and resources that guide you on offering Milk Stork benefits to your employees. This section includes:
- b. **Webinar Recordings:** A series of informative webinars to help HR teams and managers better support employees.
- c. **Toolkits:** A suite of comprehensive toolkits to empower HR teams and employees with resources and step-by-step guidance for seamless implementation and effective utilization of Milk Stork services.

3. Promotional Materials

- a. Need to spread the word? Here, you'll find everything you need to promote your Milk Stork benefit, including:
- b. Downloadable handouts and posters you can send virtually or print and distribute
- c. Other promotional assets to help you promote the Milk Stork benefit within your organization and engage your employees.

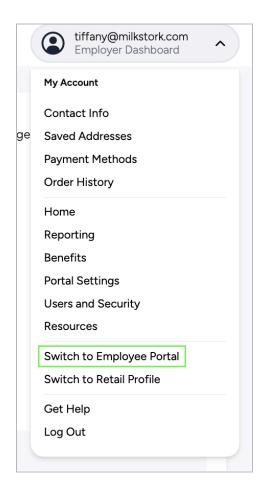
How to Use the Resource Center

- Search Bar: At the top, use the search bar to quickly locate specific topics or keywords.
- **Explore Sections**: Click on any section FAQs, Resources & Tools, or Promotional Materials to explore its contents.
- **Download Materials**: Many resources are available for download. Simply click the download icon to save a copy for future reference.



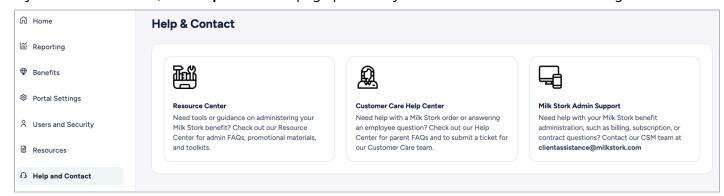
Employee Portal

Want to view your benefit as an Employee would? Click "Switch to Employee Portal" on your profile dropdown (top right menu), or simply click on the portal link listed on the Benefits page.



Help and Contact

If you need assistance, the Help & Contact page provides you with information on where to go.



• Administering Your Milk Stork Benefit:

Visit our Resource Center for tools and guidance on how to promote, administer, and navigate Milk Stork's products and software: Resource Center

- Order Assistance or Employee Questions: Help Center
- SaaS Benefit Administration Support:

For assistance with your Milk Stork SaaS benefit, contact your Client Success Manager at: clientassistance@milkstork.com

Thank you for exploring the Milk Stork Employer Dashboard QuickStart Guide!

Ready to Get Started? Visit <u>admin.milkstork.com</u> to log in to your Benefits Administration Dashboard and manage your benefits.



For support, visit https://support.milkstork.com/hc/en-us