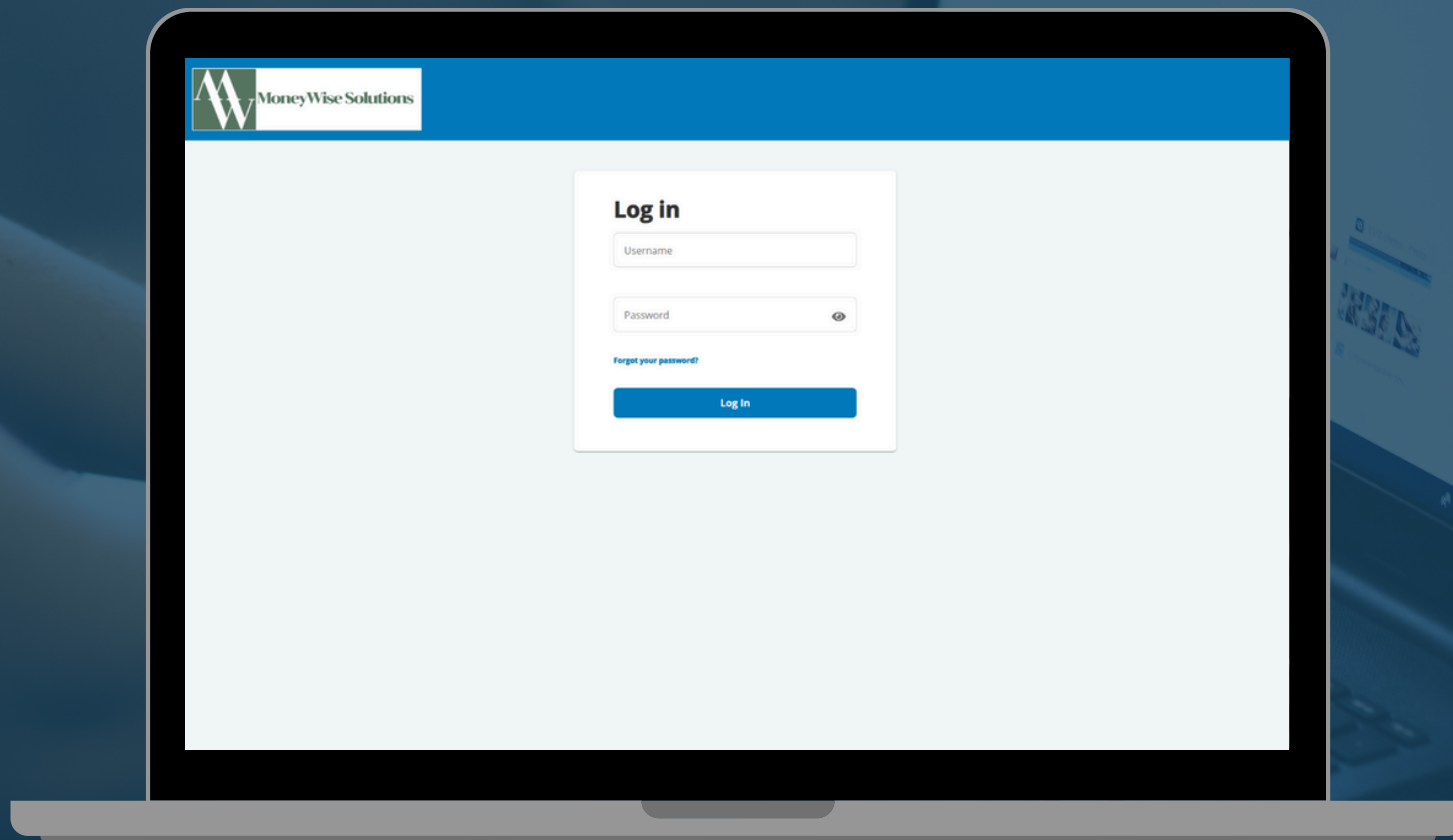


MONEYWISE SOLUTIONS EMPLOYER & BROKER CDH SPENDING ACCOUNT PORTAL

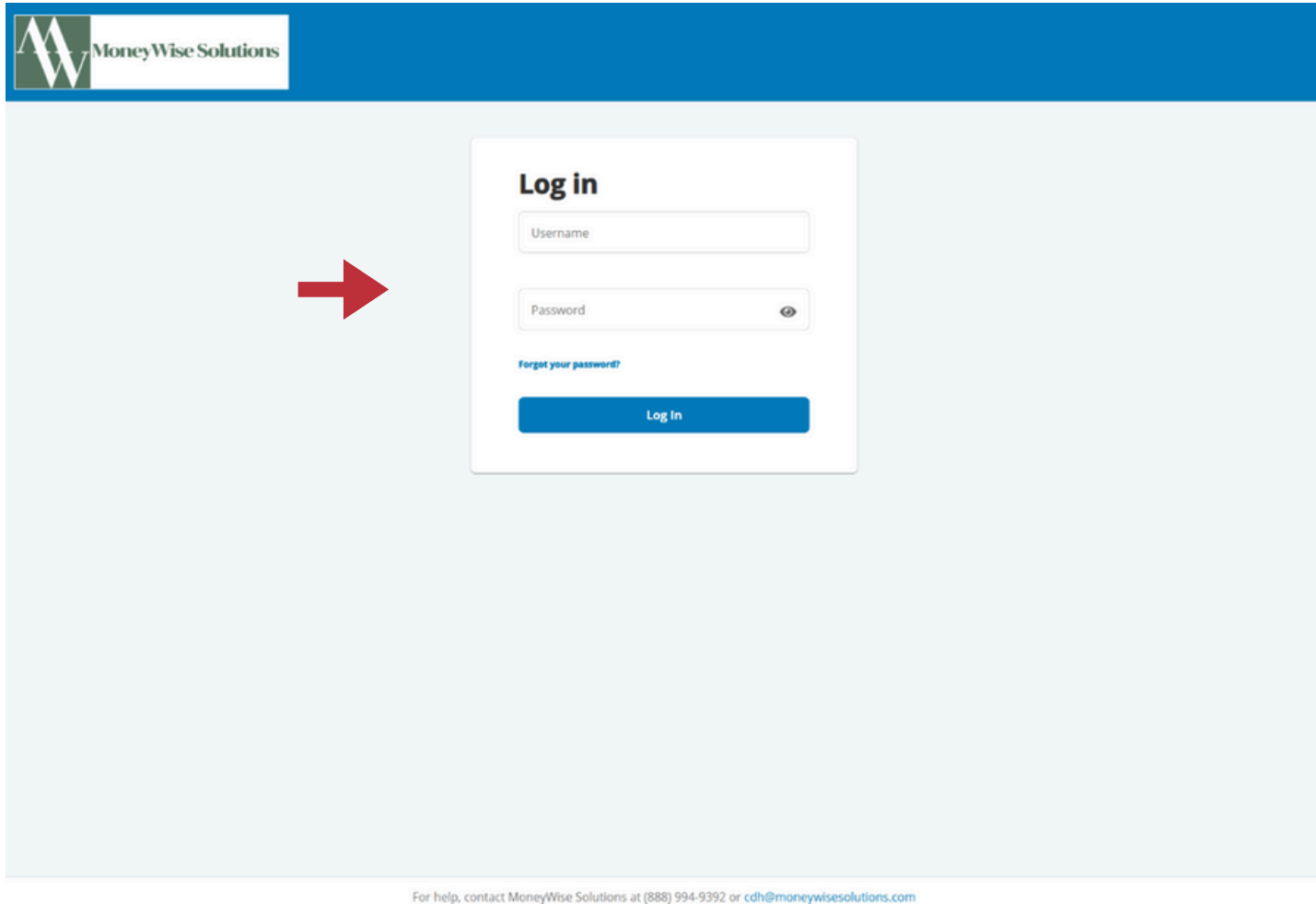


Log In

You will receive an email from MoneyWise Solutions with your **Username** and **Temporary Password**.

Upon login you will be prompted to change your password.

In the future if you forget your password please select *Forgot your password* on this Log In Page.

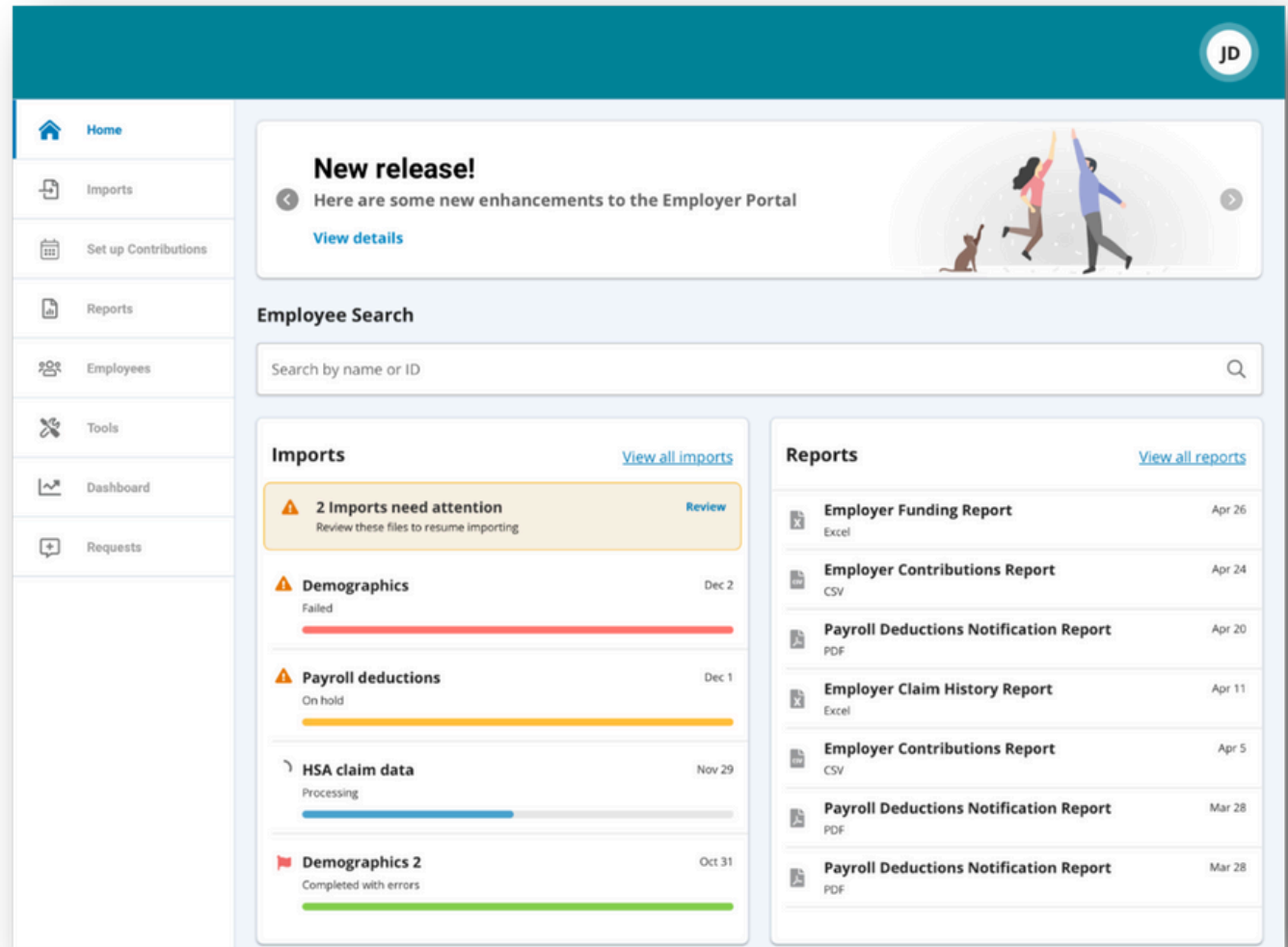


The screenshot shows the MoneyWise Solutions website's login interface. At the top, there is a blue header bar containing the MoneyWise Solutions logo on the left. The main content area has a light blue background. In the center, there is a white login form titled "Log in". The form contains two input fields: "Username" and "Password". The "Password" field has a small eye icon to its right, indicating a toggle for password visibility. Below the password field is a blue link that says "Forgot your password?". At the bottom of the form is a blue button labeled "Log In". A large red arrow points from the left towards the login form. At the very bottom of the page, there is a small line of text: "For help, contact MoneyWise Solutions at (888) 994-9392 or cdh@moneywisesolutions.com".

Dashboard/Home Page

The home page serves as the central hub for accessing all features within the Portal. From here, users can easily navigate to various tools and resources such as:

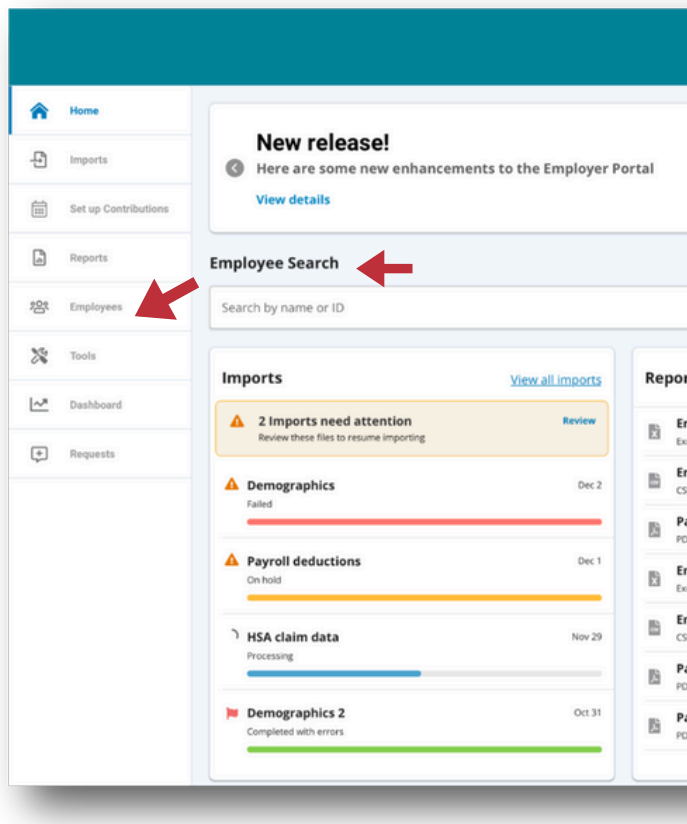
- View employees
- View all elections and balances
- Check status of imports
- View and run reports
- View plan information
- View links and resources
- Update login & security information
- View messages
- Find help



Locate Employee Data

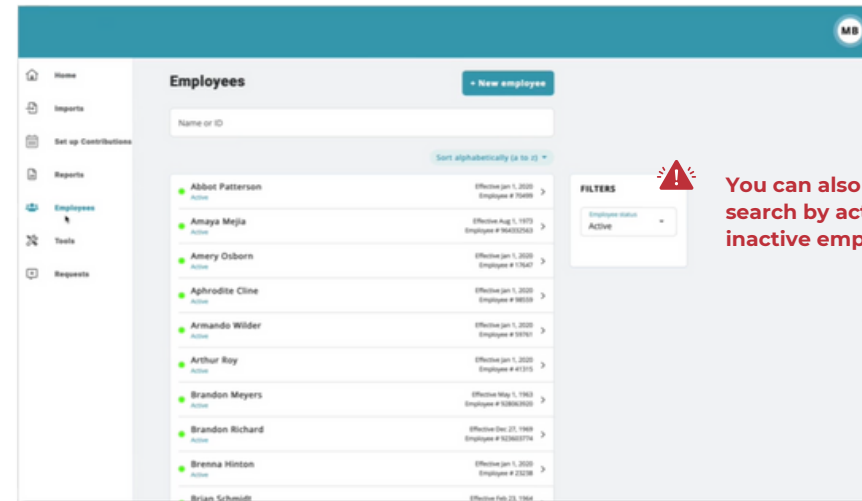
You can get real-time data on all employees directly from your dashboard.

Select Employee or Search for Employee on Dashboard



Employee Tab

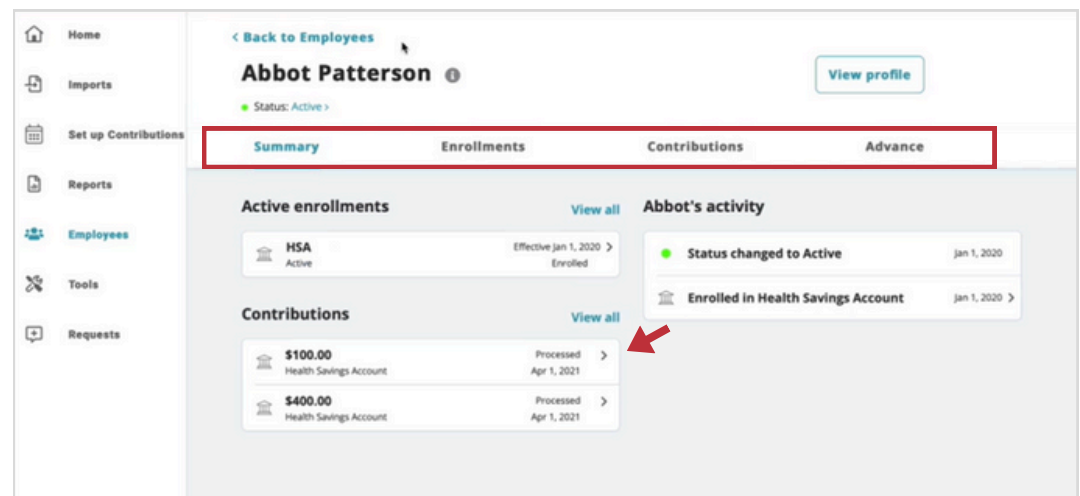
Select Scroll or Search for Employee



You can also filter your search by active and inactive employee records.

Employee Records

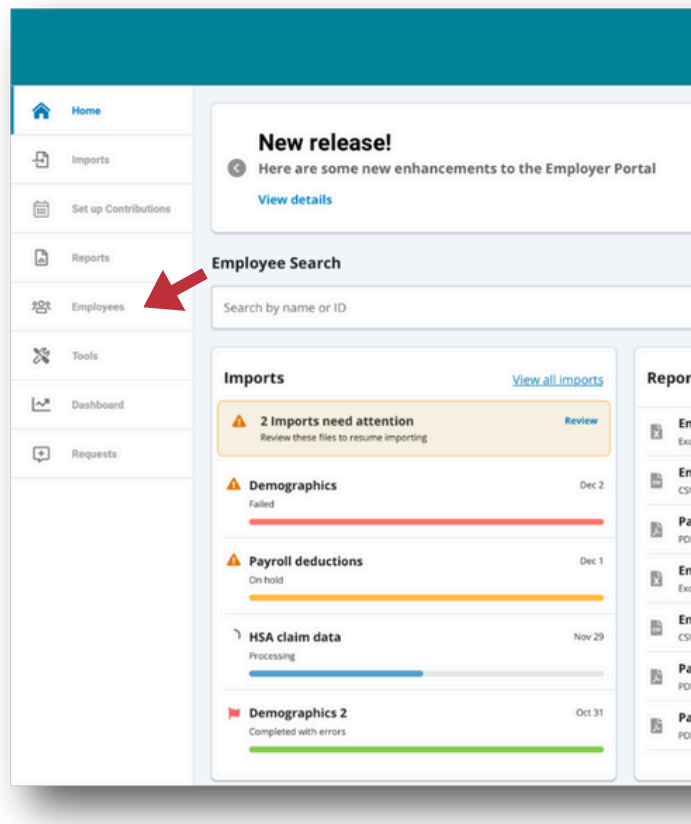
You can use the tabs as well as expand sections to view more details.



Add Employee

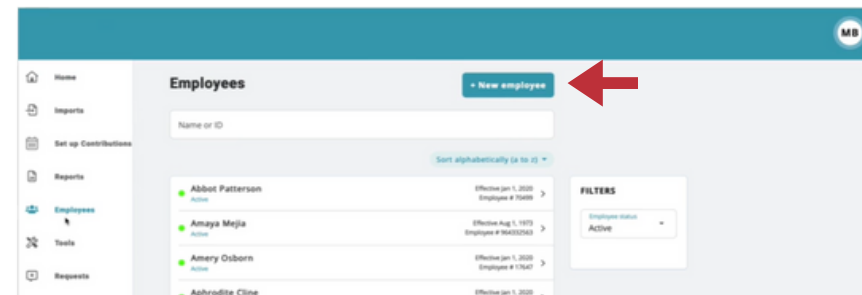
You can add new employees as well as enroll them in benefits within the Employee Tab.

Select Employee Tab



Employee Tab

Select + New Employee



Add New Employee

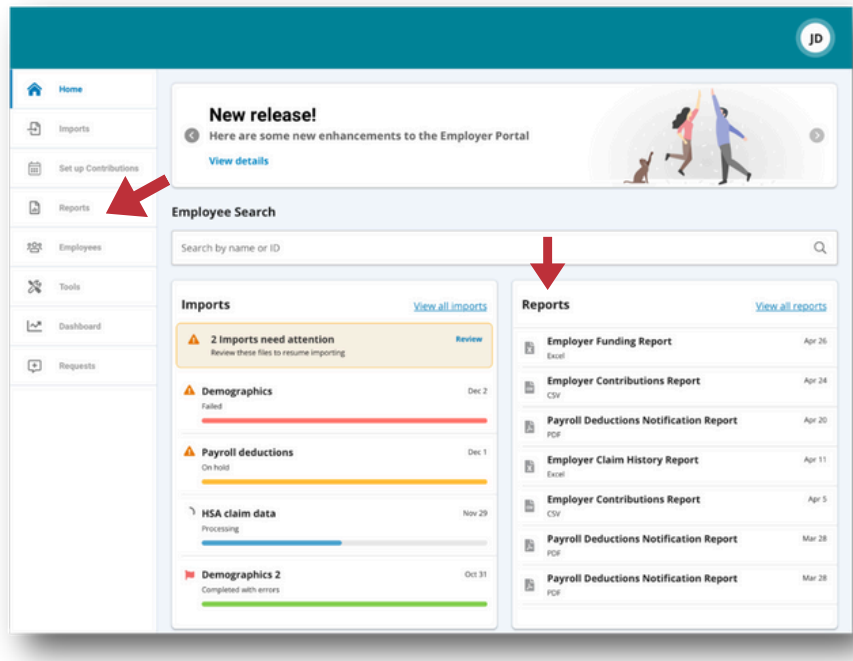
Complete all Required Fields, and continue to enroll in benefits.

This screenshot shows the 'Add employee' form. The form is titled 'Add employee' and has a '< Back to Employees' link. It contains two main sections: 'Personal information' and 'Address'. The 'Personal information' section includes fields for First name, MI, Last name, Birth date, Gender, SSN, Marital status, Email address, Home phone, Work phone, and Ext. The 'Address' section includes a Country dropdown menu.

Reports

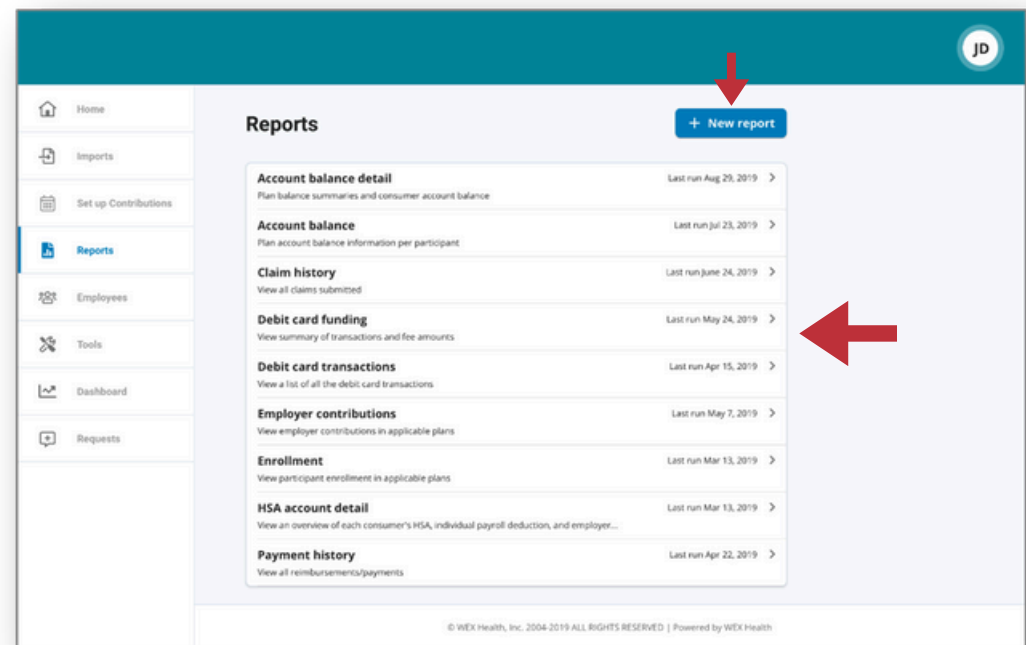
You have access to various reports on enrollments, financials, contributions and much more. Additionally you can run new reports when needed.

Select the Reports Tab Or Specific Report from Dashboard



Reports Tab

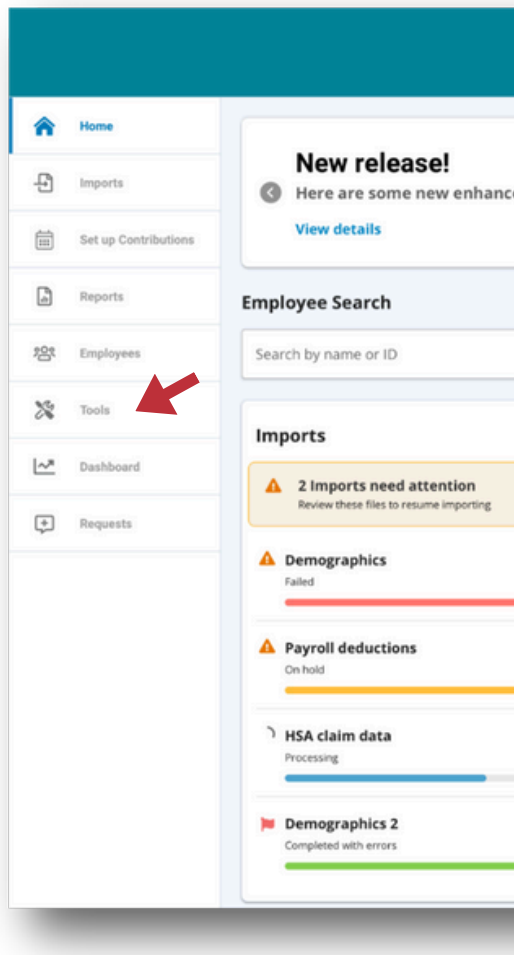
Select Report or select New Report to run a report.



View Plan Information

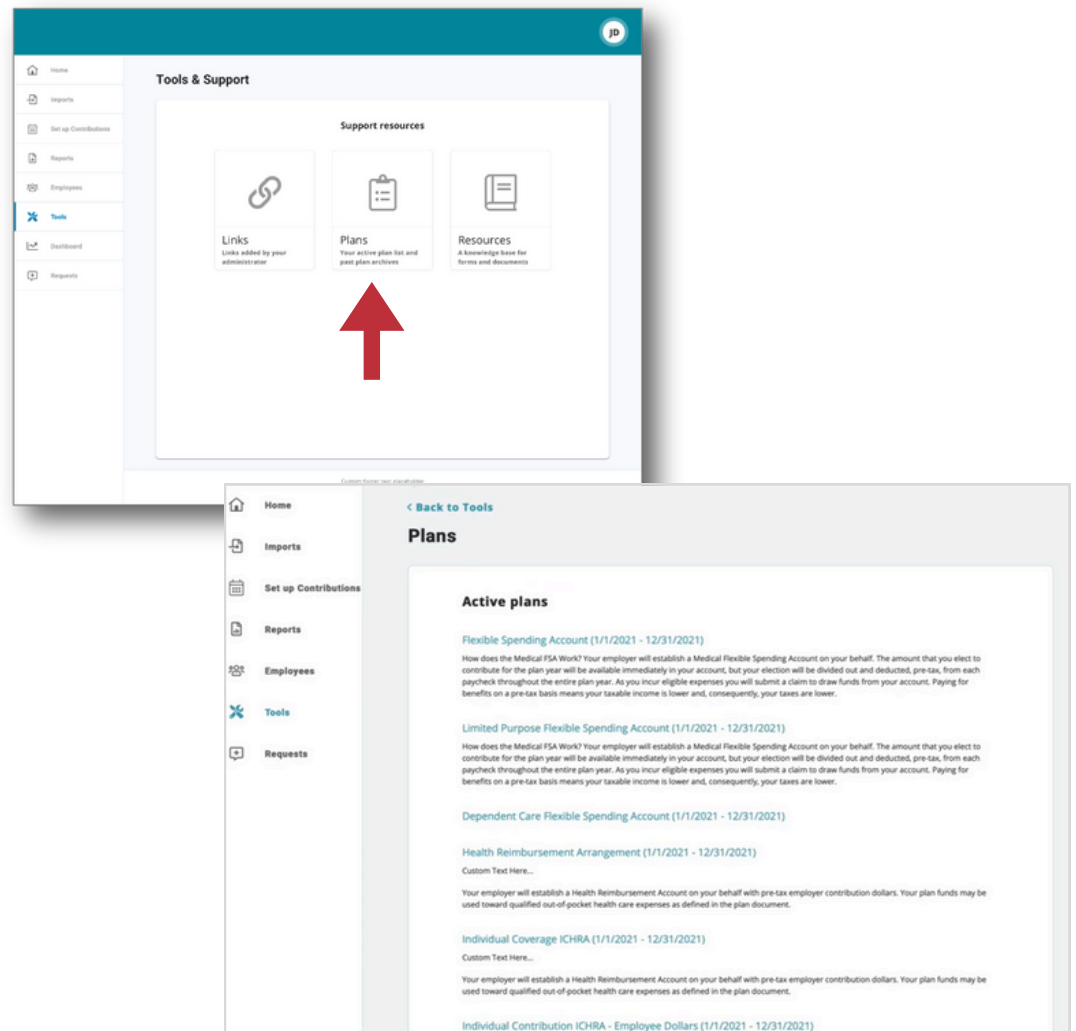
The Tools Tab will give you access to your Plan Information as well as Links and additional Resources.

Select Tools



Tools Tab

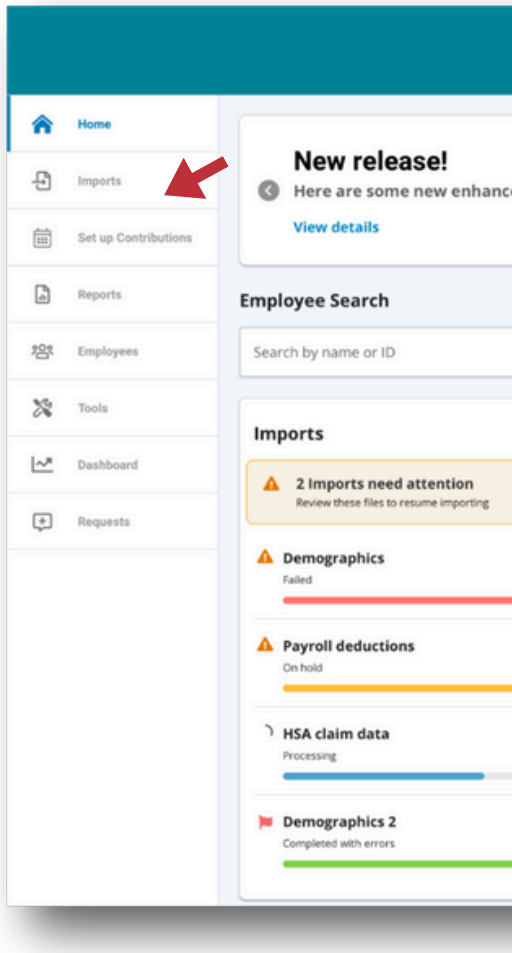
Select Plans to view current and past plan information.



Import Data

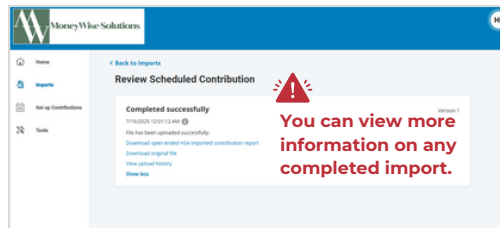
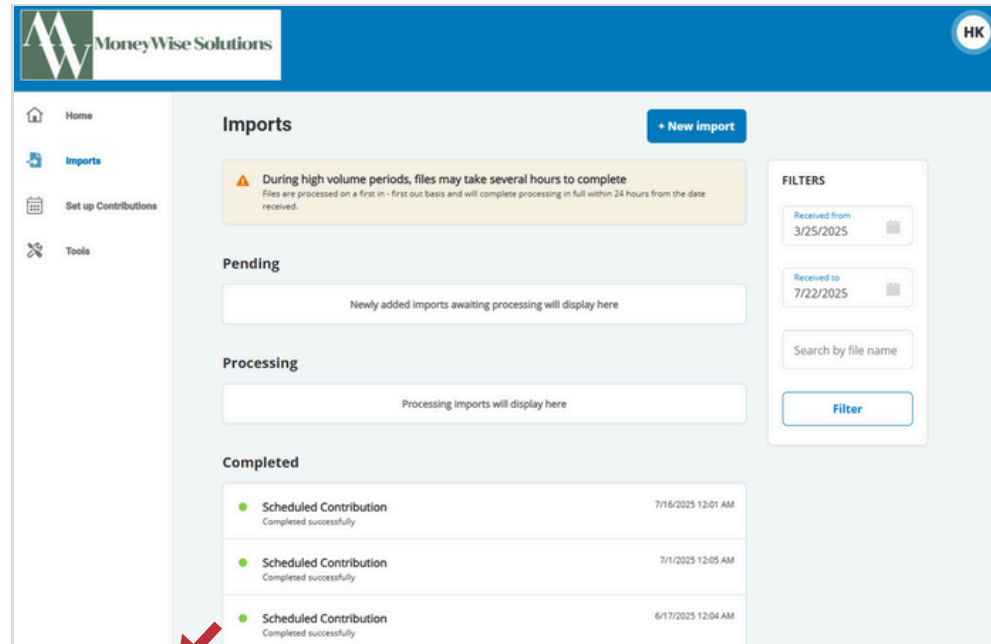
You can import demographic, enrollment and contribution files directly into the portal using standard excel or CSV formatted import files.

Select Import

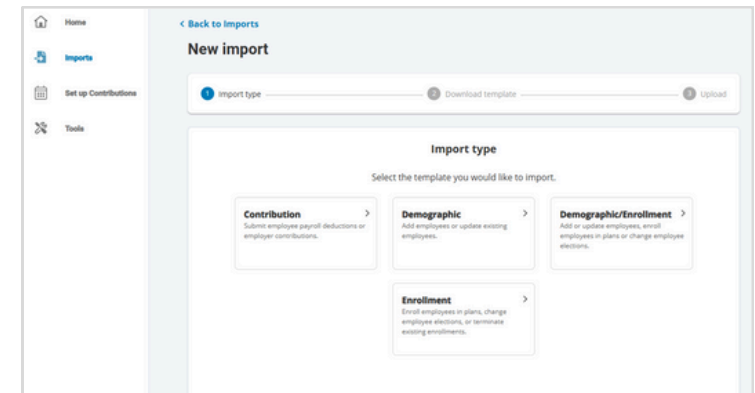


Import Tab

You can view completed and pending imports, as well as add a new import.



New Import Options



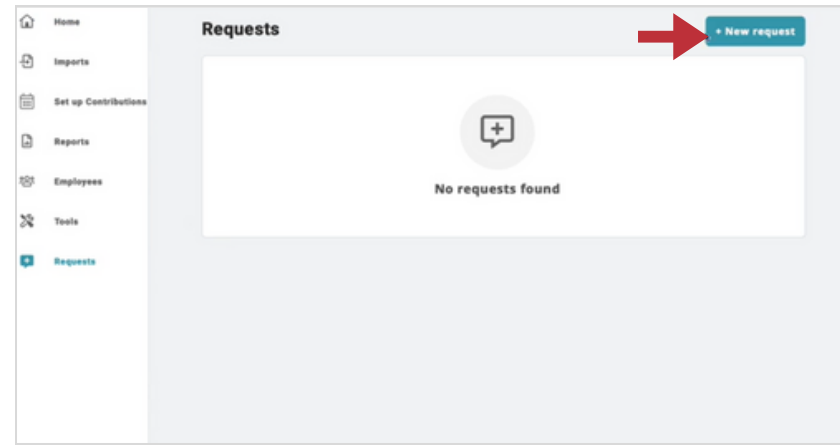
Requests

The Requests Tab allows you to contact your administrator with various requests such as:

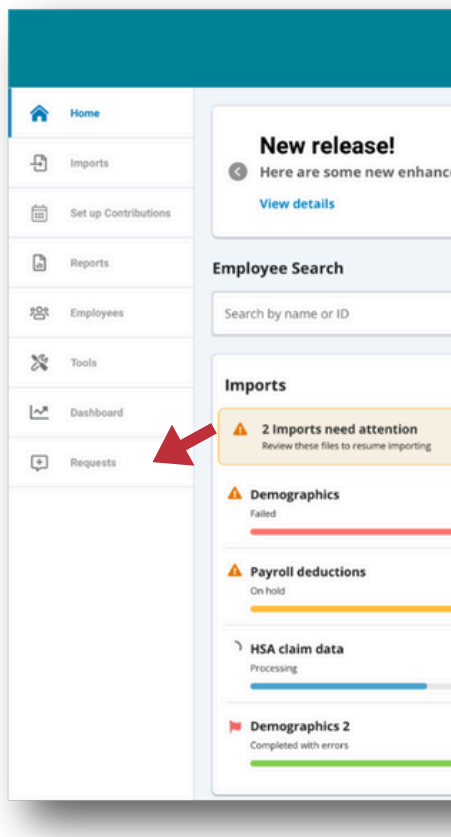
- Add New Employee
- Add Employer Contacts
- Attach Files
- Request Documents
- Change Payroll Deductions

Requests Tab

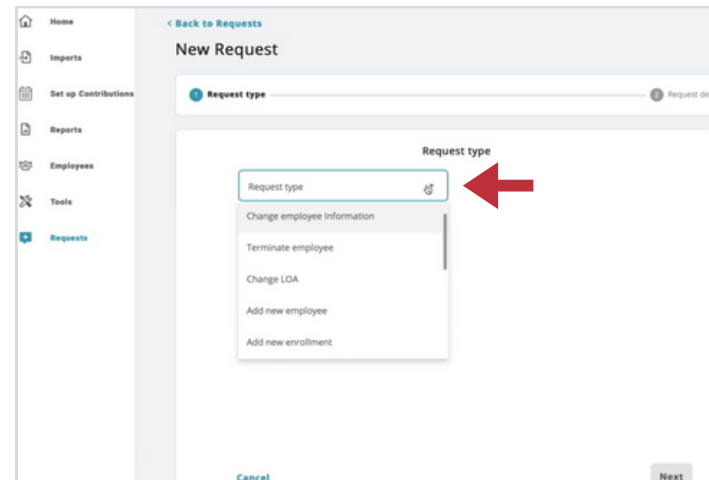
Any current request will be shown here, and you can also submit a New Request.



Select Requests



Select Request Type



Request Details

