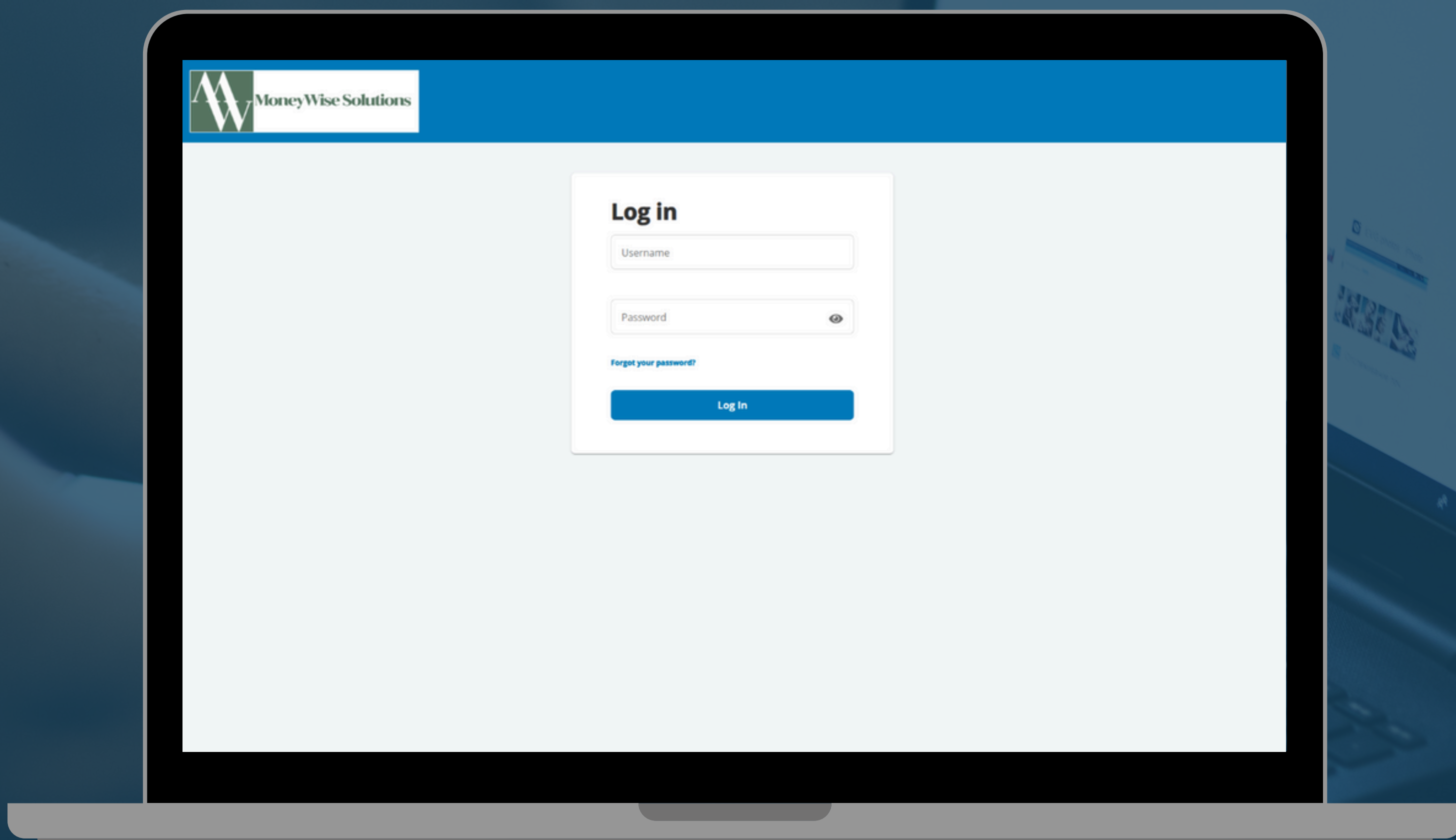
MONEYWISE SOLUTIONS

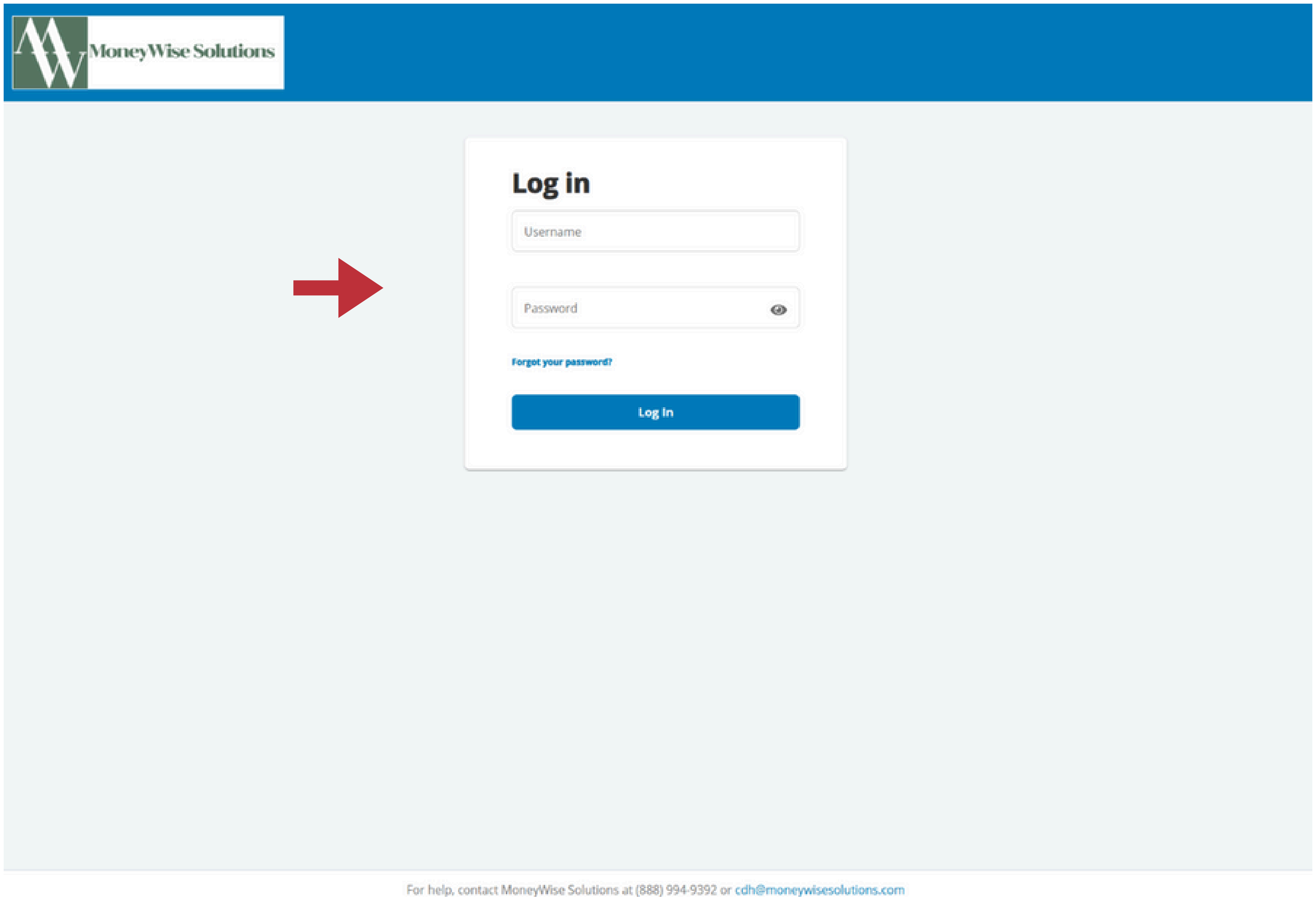
EMPLOYER & BROKER
CDH SPENDING ACCOUNT PORTAL



MoneyWise Solutions

Log In

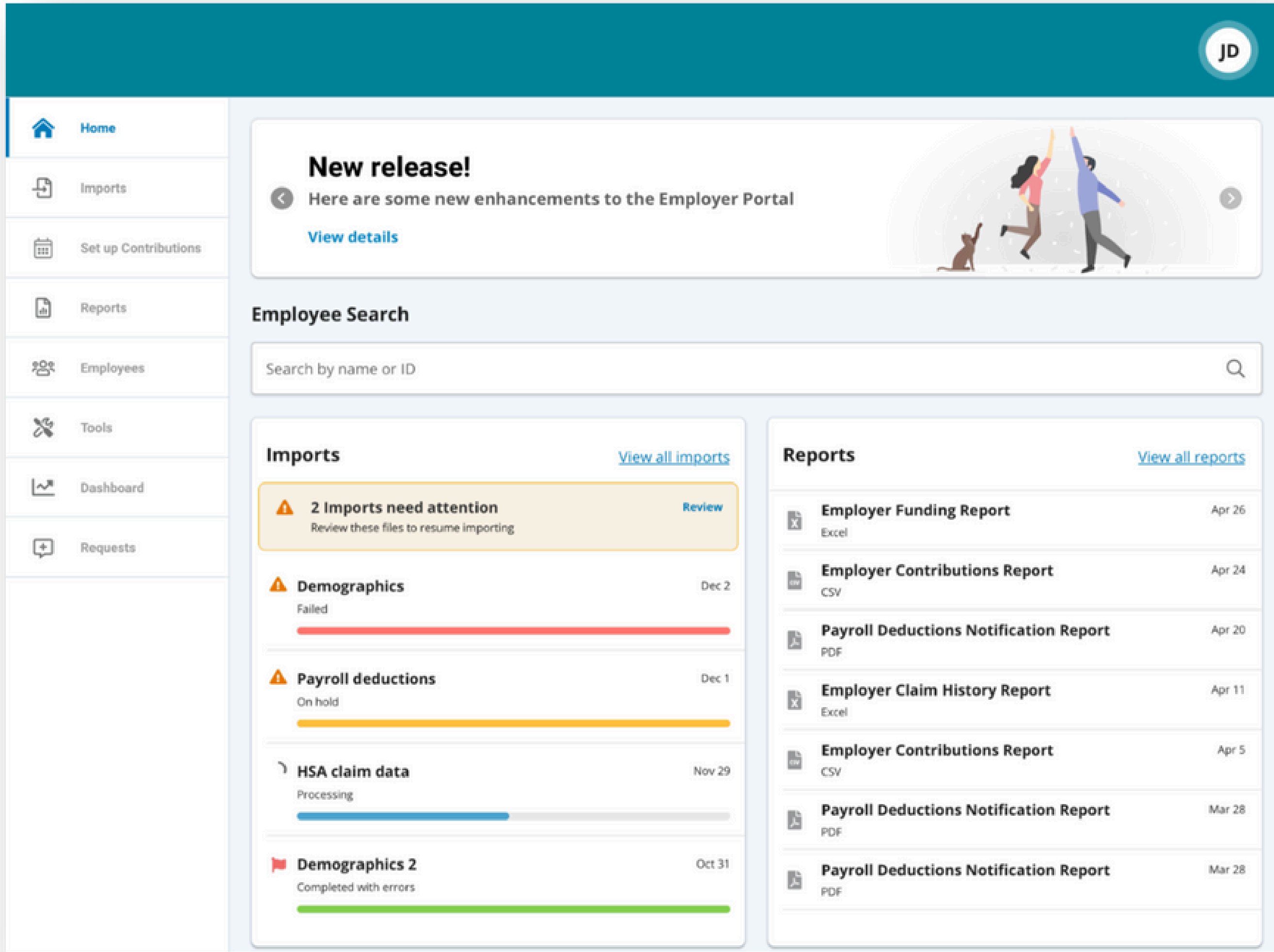
You will receive an email from MoneyWise Solutions with your **Username** and **Temporary Password**.
Upon login you will be prompted to change your password.
In the future if you forget your password please select *Forgot your password* on this Log In Page.



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:

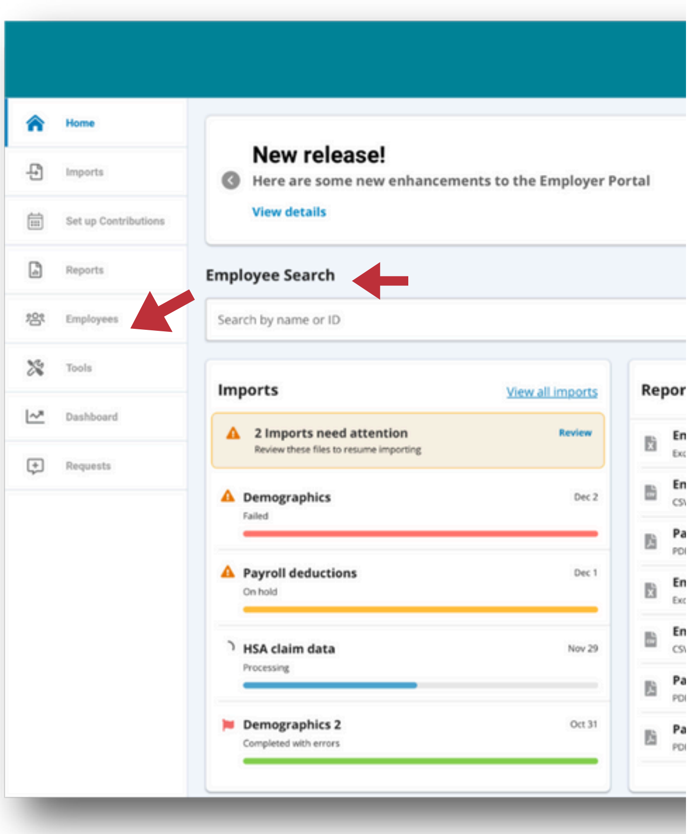
- View employees
- View all elections and balances
- Check status of imports
- View and run reports
- View plan information
- View links and resources
- Update login & security information
- View messages
- Find help



Locate Employee Data

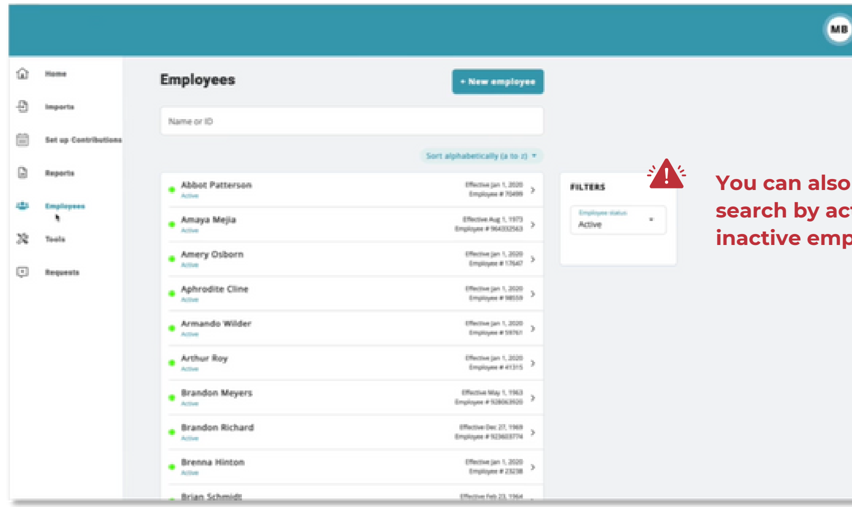
You can get real-time data on all employees directly from your dashboard.

Select Employee or Search for Employee on Dashboard



Employee Tab

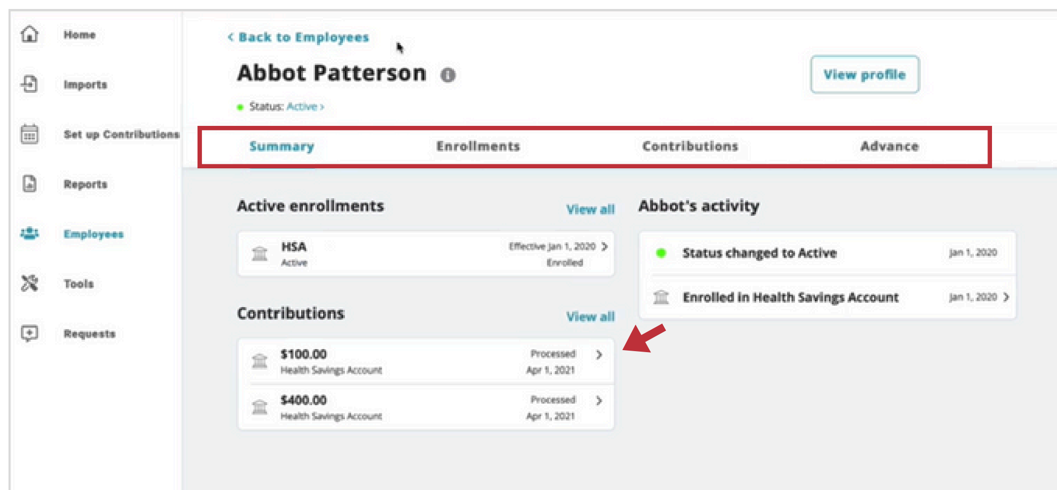
Select Scroll or Search for Employee



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

Employee Records

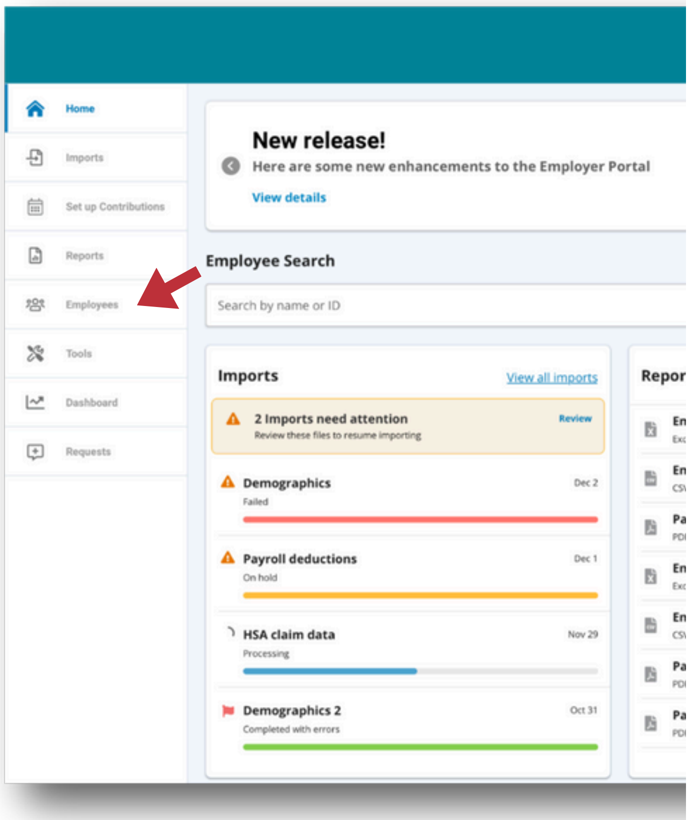
You can use the tabs as well as expand sections to view more details.



Add Employee

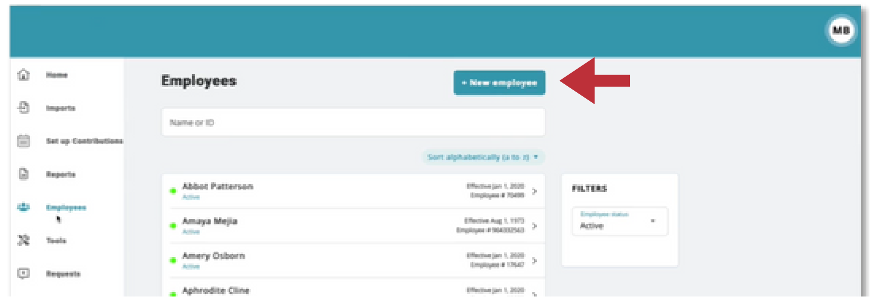
You can add new employees as well as enroll them in benefits within the Employee Tab.

Select Employee Tab



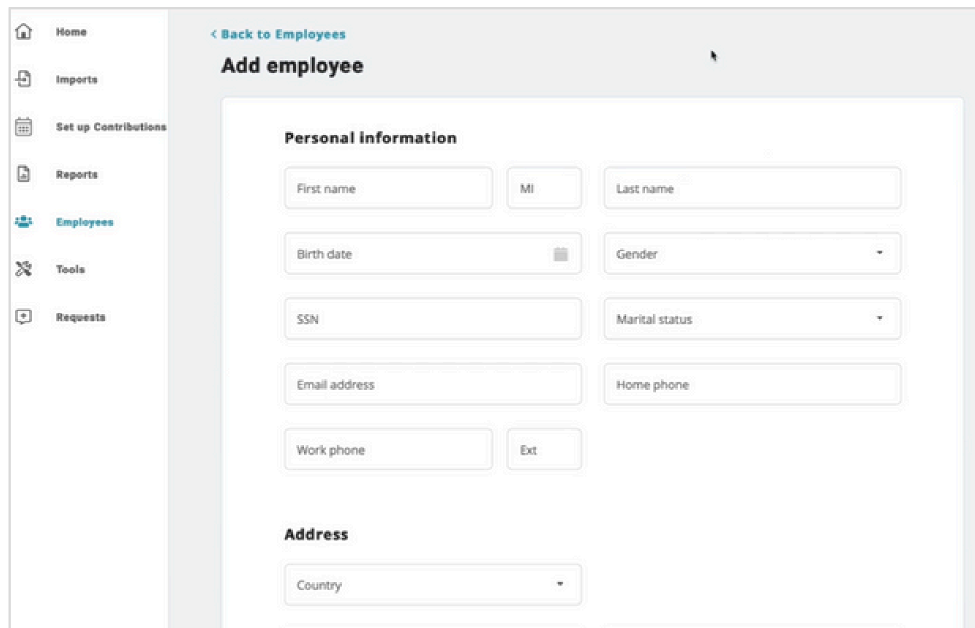
Employee Tab

Select + New Employee



Add New Employee

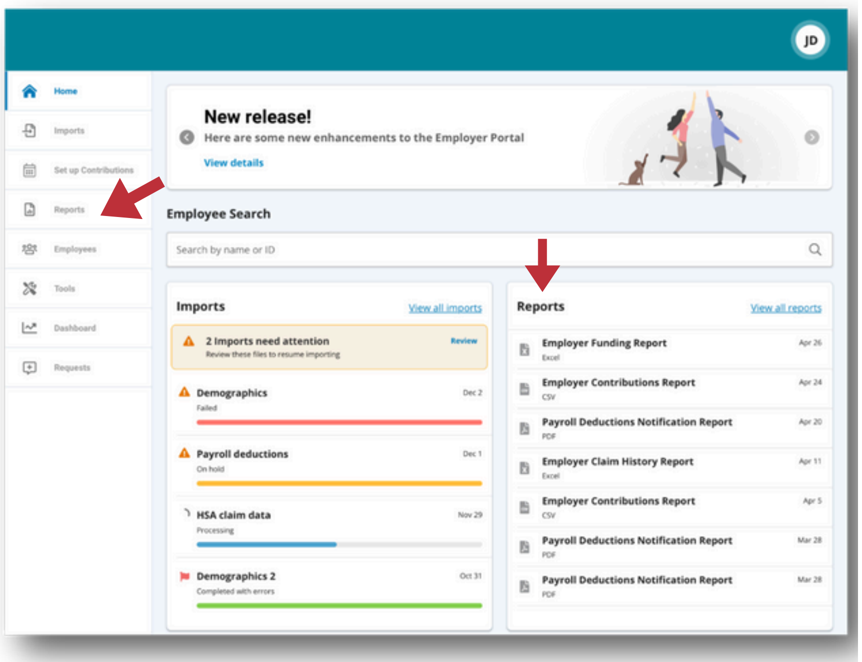
Complete all Required Fields, and continue to enroll in benefits.



Reports

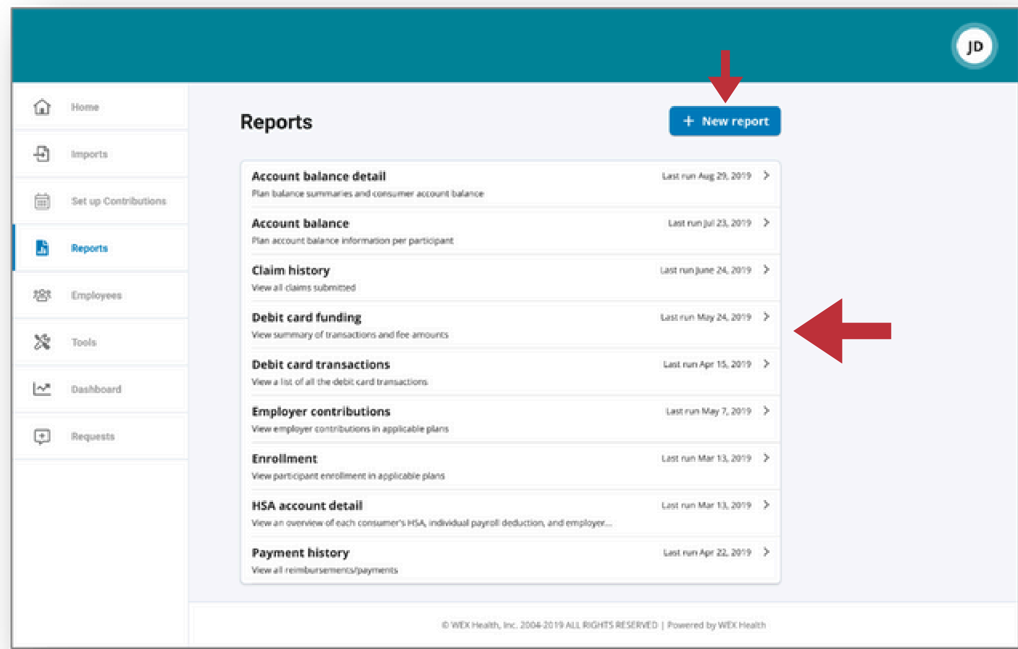
You have access to various reports on enrollments, financials, contributions and much more. Additionally you can run new reports when needed.

Select the Reports Tab
Or Specific Report from Dashboard



Reports Tab

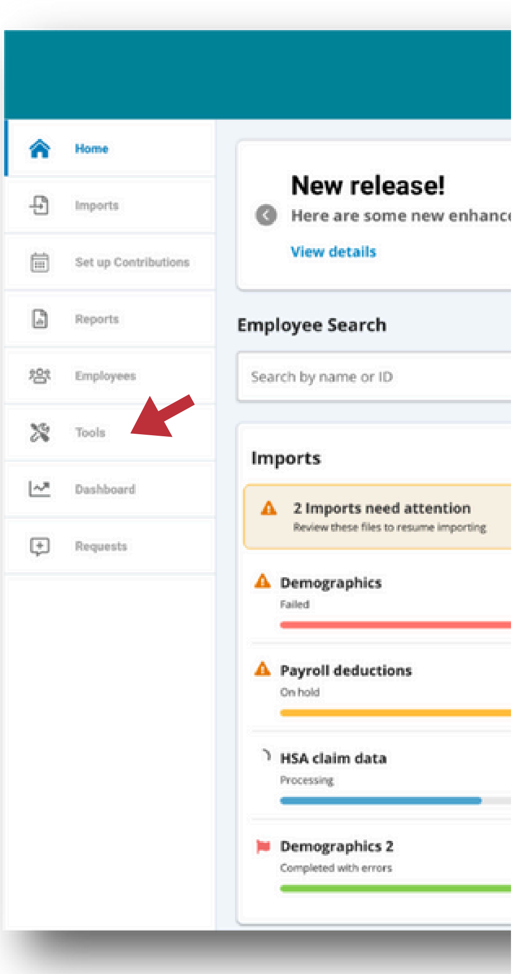
Select Report or select New Report to run a report.



View Plan Information

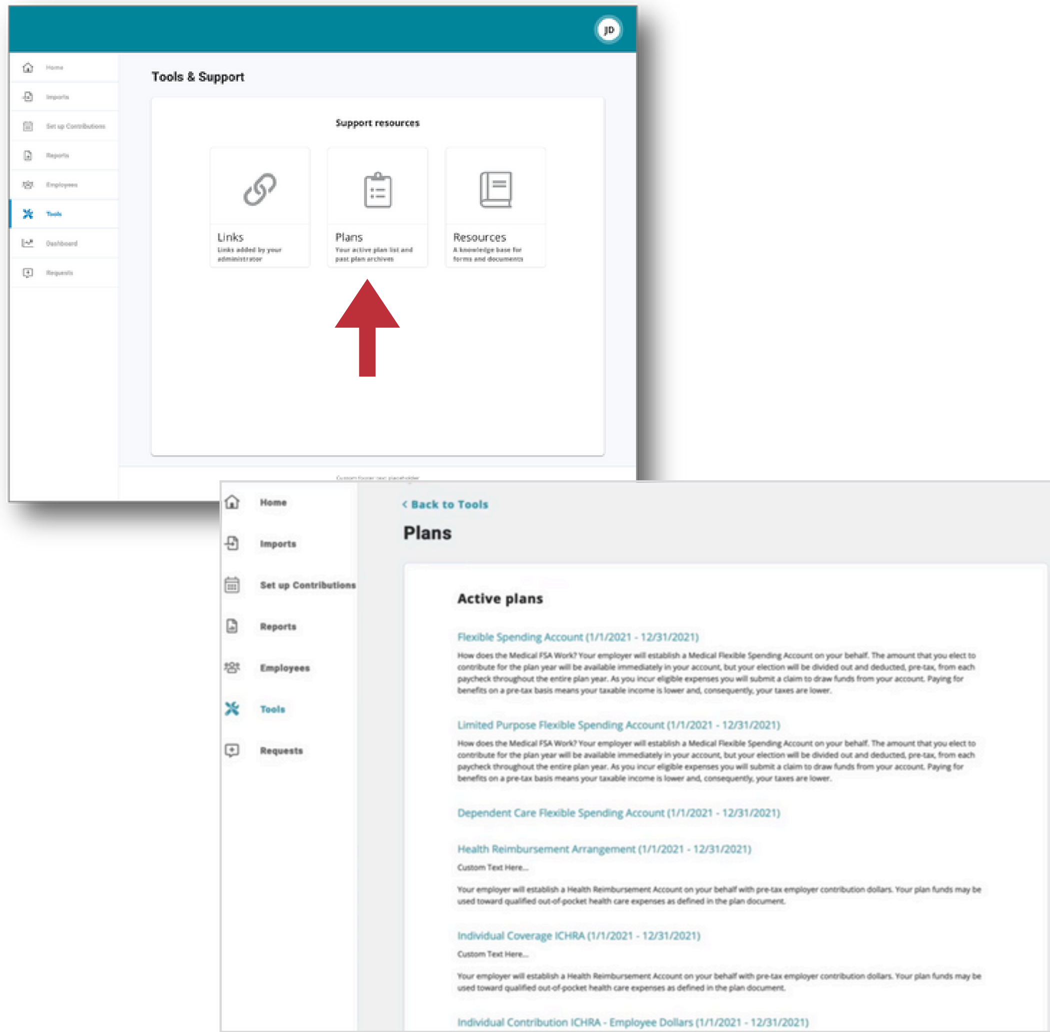
The Tools Tab will give you access to your Plan Information as well as Links and additional Resources.

Select Tools



Tools Tab

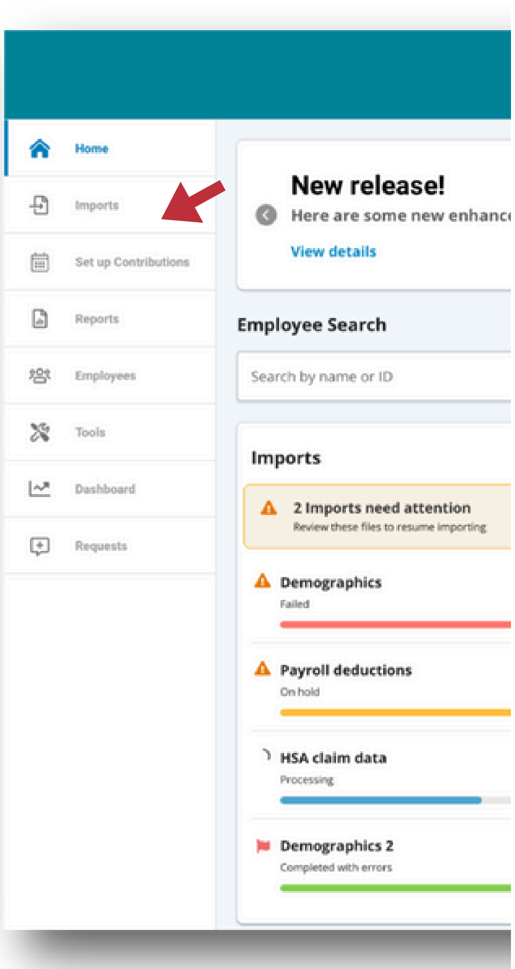
Select Plans to view current and past plan information.



Import Data

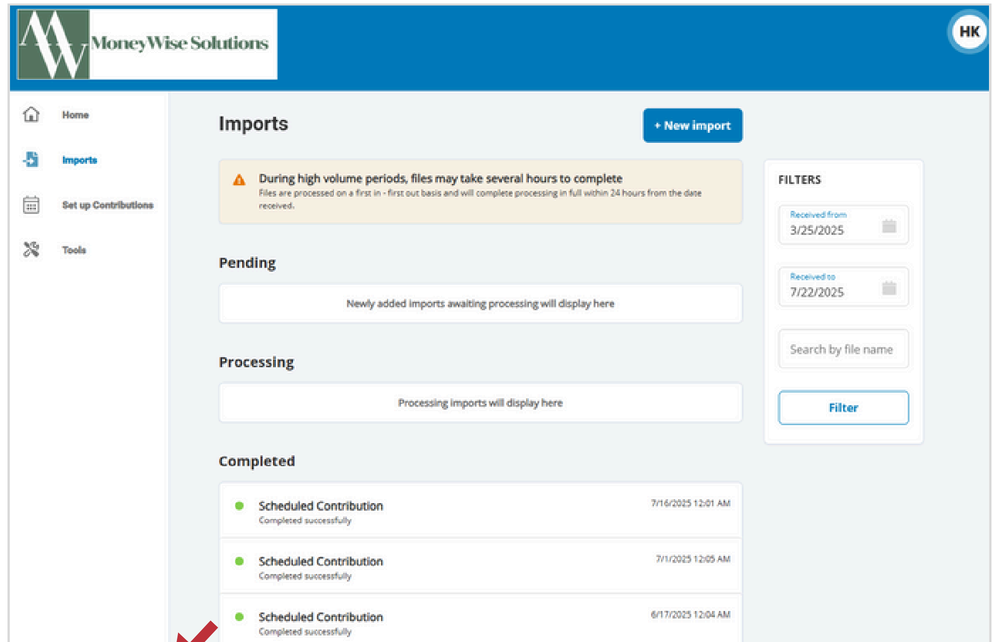
You can import demographic, enrollment and contribution files directly into the portal using standard excel or CSV formatted import files.

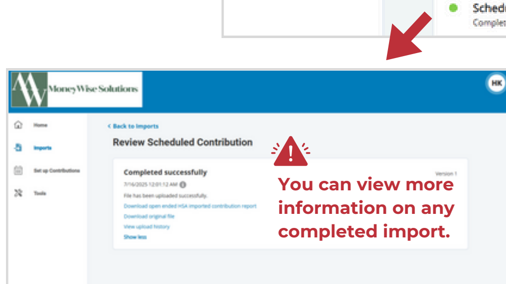
Select Import



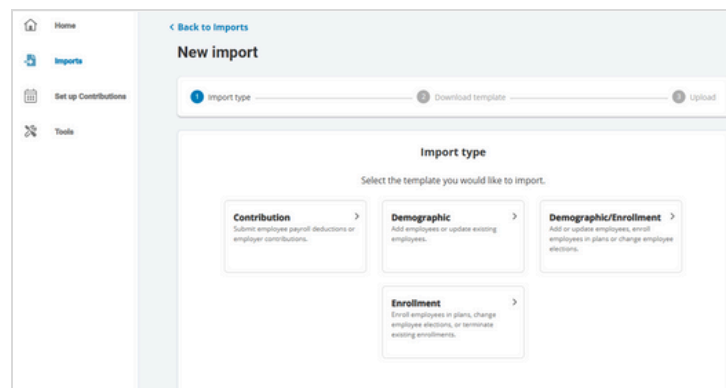
Import Tab

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





New Import Options



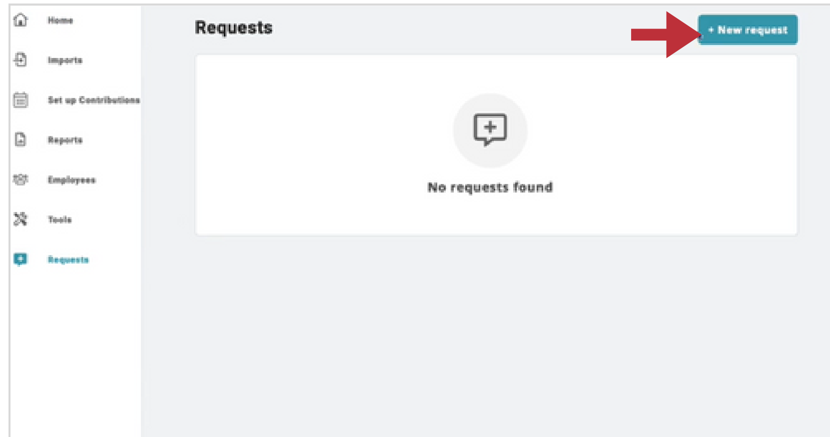
Requests

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

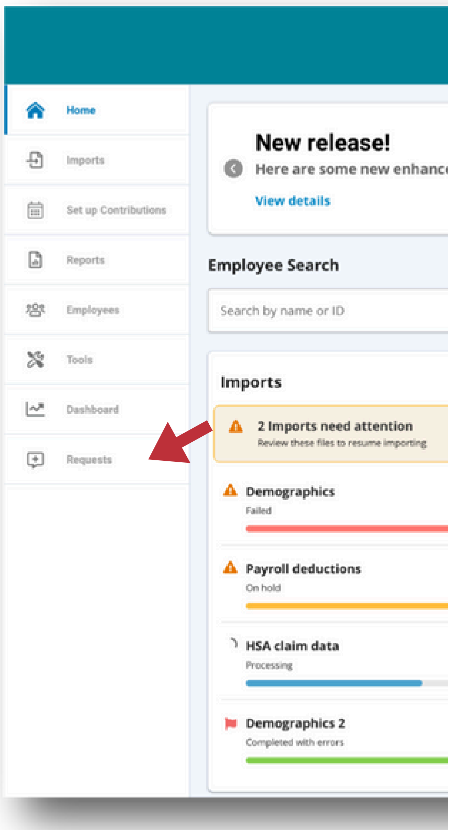
- Add New Employee
- Add Employer Contacts
- Attach Files
- Request Documents
- Change Payroll Deductions

Requests Tab

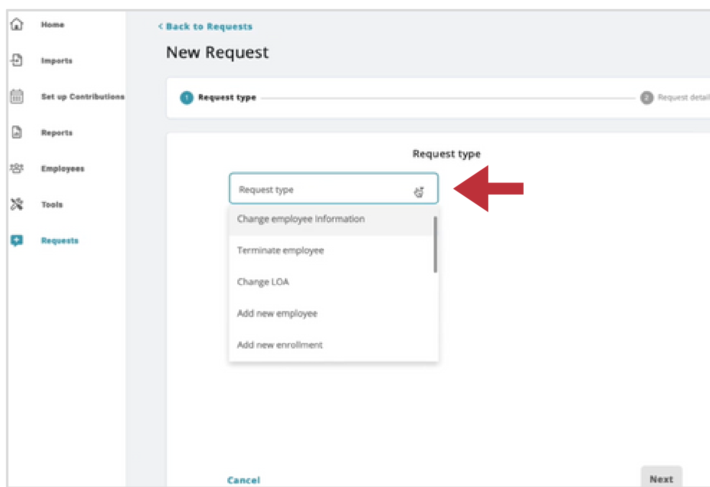
Any current request will be shown here, and you can also submit a New Request.



Select Requests



Select Request Type



Request Details