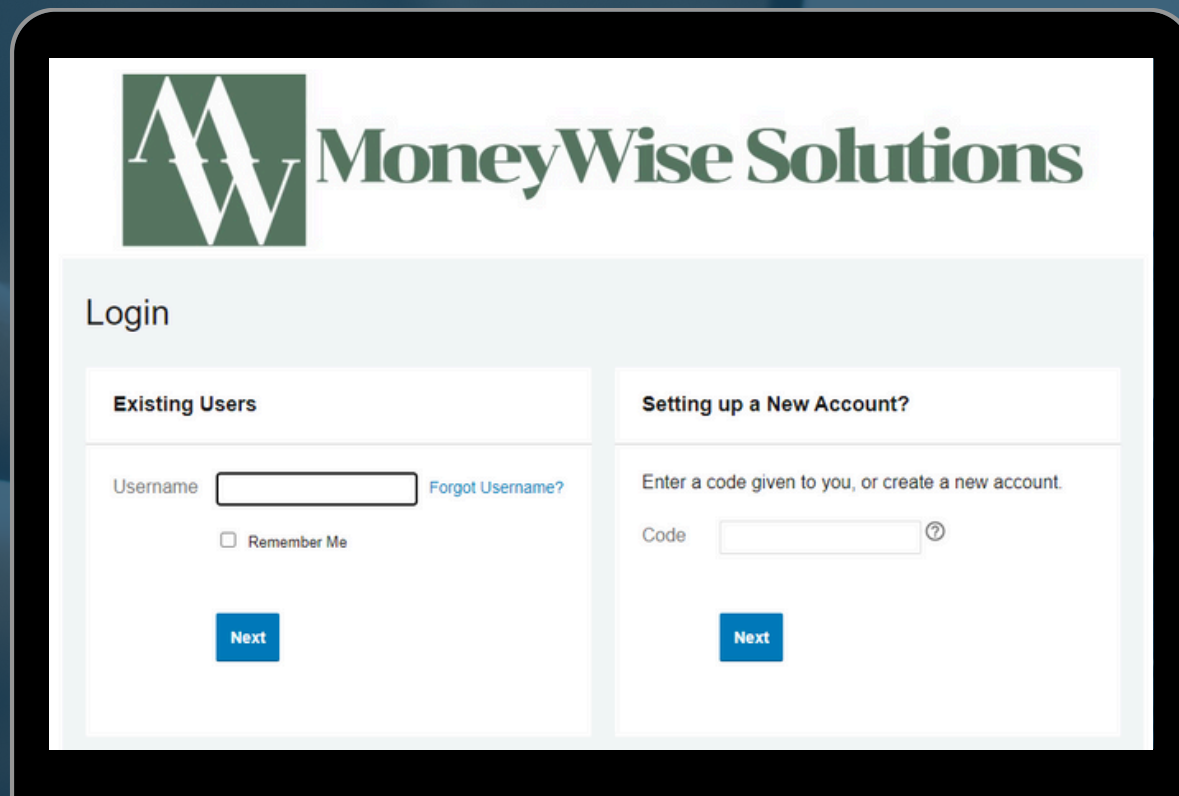


MONEYWISE SOLUTIONS

PARTICIPANT SPENDING

ACCOUNT PORTAL

FSA, Mass Transit, Parking, HRA




The screenshot shows the MoneyWise Solutions login page. At the top left is the MoneyWise Solutions logo, consisting of a stylized 'M' and 'W' in a green square. To the right of the logo is the text 'MoneyWise Solutions' in a green serif font. Below the logo and text is the heading 'Login'. The page is divided into two main sections: 'Existing Users' and 'Setting up a New Account?'. The 'Existing Users' section contains a 'Username' input field, a 'Forgot Username?' link, a 'Remember Me' checkbox, and a blue 'Next' button. The 'Setting up a New Account?' section contains the instruction 'Enter a code given to you, or create a new account.', a 'Code' input field with a help icon, and a blue 'Next' button.

Create Account or Log In

There are two options for creating an account on the MoneyWise Participant Portal

1. New User? Click Get Started.

You will then be prompted to add your Full Name, SSN, and Zip Code. After your information is matched you will be prompted to create an account, set up security questions, and enter a username and password.



Verify User

25%

Complete the information below to verify your identity. *Required


First Name*

Last Name*

Zip Code*

Identification Number

SSN* - -



Login

Existing Users

Username [Forgot Username?](#)

Remember Me

1

New User?

Create your new username and password

2

Setting up a New Account?


Enter a code given to you, or create a new account.

Code

Contact Us - Call MoneyWise Solutions at (888) 994-9392 or Email us at cdh@moneywisesolutions.com

2. Setting Up a New Account?

Enter the code provided by your employer and click "Next." You will then be prompted to create an account, set up security questions, and enter a username and password.



Security Questions

50%

Please enter an answer to any 3 security questions to complete your user setup. To keep your information secure, you will be asked to answer 3 of these questions to complete sensitive actions within the portal such as resetting a forgotten password. *Required

What city were you born in?

Select a question...

Select a question...

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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:

- Viewing all elections and balances
- Submitting Claims for Reimbursement
- Updating Reimbursement Method
- View Eligibility List
- Visit FSA Store
- Update Login & Security Information
- View Messages
- Find Help

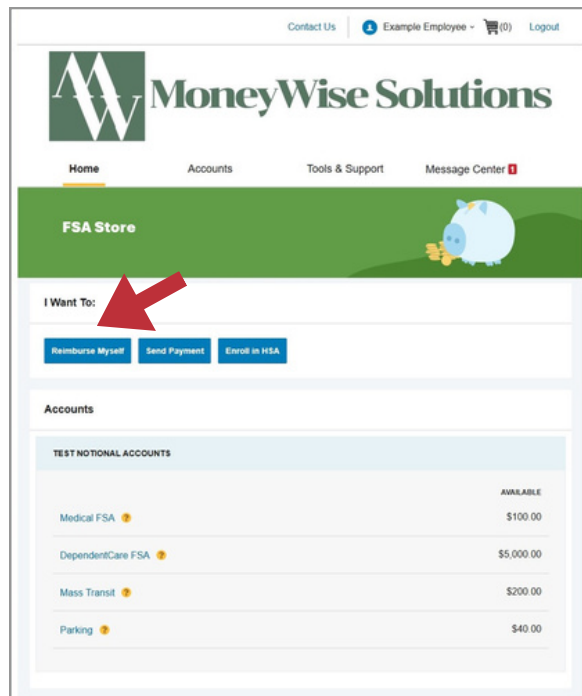
The screenshot shows the MoneyWise Solutions dashboard. At the top right, there are links for 'Contact Us', a user profile for 'Example Employee' with a dropdown arrow, a shopping cart icon with '(0)', and a 'Logout' link. The main header features the MoneyWise Solutions logo and a navigation menu with 'Home' (highlighted), 'Accounts', 'Tools & Support', and 'Message Center' with a notification icon. Below the navigation is a green banner for the 'FSA Store' with a piggy bank illustration. The 'I Want To:' section contains three buttons: 'Reimburse Myself', 'Send Payment', and 'Enroll in HSA'. The 'Accounts' section is titled 'TEST NOTIONAL ACCOUNTS' and contains a table with the following data:

	AVAILABLE
Medical FSA ?	\$100.00
DependentCare FSA ?	\$5,000.00
Mass Transit ?	\$200.00
Parking ?	\$40.00

Reimbursing Yourself

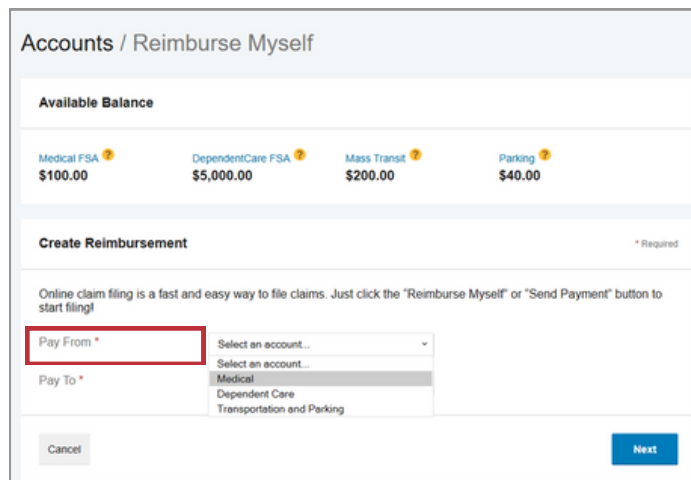
You can submit a claim to request reimbursement for any eligible expense not paid with your debit card.

1. Select Reimbursement Myself



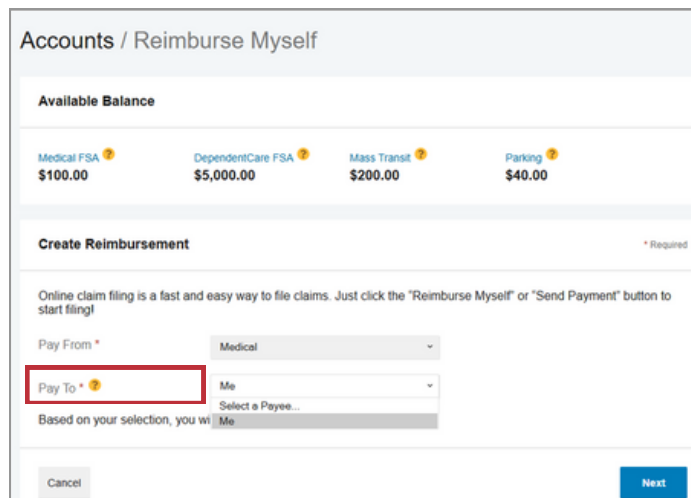
2. Create Reimbursement

Enter Account (i.e. Medical, Dependent Care, etc.)



3. Pay To

Generally it will always say Me (Select Me from Dropdown)



Once complete click Next

Reimbursing Yourself (continued)

4. Claim Details

Provide all relevant details for the claim you are submitting for reimbursement. Be sure to complete all applicable fields accurately.

Claim Details * Required

Start Date of Service * 10/01/2024

End Date of Service 10/1/2024

Amount * \$ 40.00

Provider * CVS

Category * ? Drugs & Medicine

Type * Other Drugs & Medicine

Description

If the category is 'Other' or 'Over-the-Counter Drugs', you must provide a description.

Recipient * Example Employee

[Add Dependent](#)

Set up a recurring claim for this expense

Summary

Pay From Medical

Pay To Me

Documentation Uploaded Yes

[Cancel](#) [Previous](#) [Next](#)

Click Next on each page to proceed through the process until you reach the final Summary Page, where you can submit your information.

5. Attach Receipt

- Select **Upload Valid Documentation**
- A pop-up will appear, allowing you to either (1) browse your computer to upload a file or (2) select a previously uploaded receipt from your account.

Available Balance

Medical FSA ? \$100.00

Dependent Care FSA ? \$5,000.00

Mass Transit ? \$200.00

Parking ? \$40.00

Receipt / Documentation

Receipt(s) * [Upload Valid Documentation](#)

Summary

Pay From Medical

Pay To Me

[Cancel](#) [Previous](#) [Next](#)

Upload Receipt(s) ✕

/1.jpg [Remove](#)

Upload options

Browse for a file on your computer.

Select an image from your receipt organizer.

Receipts must be in a JPG, JPEG, GIF, PNG or PDF format and cannot exceed 8 MB. The maximum number of uploaded receipts is 4.

[Cancel](#) [Submit](#)

6. Summary

On this page, you can edit your submission, add additional claims, or save it for later. When finished, click Submit.

Transaction Summary (1)

FROM	TO	EXPENSE	AMOUNT	APPROVED AMOUNT ?
+ Medical FSA	Me	Other Drugs & Medicine	\$40.00	\$40.00
Total Amount			\$40.00	\$40.00

Claims Terms and Conditions ^

I have read, understand, and agree to the [Terms and Conditions](#).

[Cancel](#) [Save for Later](#) [Add Another](#) [Submit](#)

Viewing Account Information

From the Home Page, you can navigate to the Account Tab, where you can view all your current elections, claims, payments, and statements. You can also manage or set up banking for direct deposit and update your payment schedule.

Accounts / Account Activity

Select an Account

DependentCare FSA (10/1/2024 - 11/30/2024)

Select an account.

- DependentCare FSA (10/1/2024 - 11/30/2024)
- Mass Transit (10/1/2024 - 11/30/2024)
- Medical FSA (10/1/2024 - 11/30/2024)
- Parking (10/1/2024 - 11/30/2024)

AVAILABLE BALANCE

\$5,000.00

Transactions

PENDING TRANSACTIONS

REQUESTED DATE	DESCRIPTION	METHOD	CONTRIBUTION (DEPOSIT)	DISTRIBUTION (WITHDRAWAL)	AVAILABLE CASH BALANCE
There are no records to display.					

PROCESSED TRANSACTIONS

PROCESSED DATE	DESCRIPTION	METHOD	CONTRIBUTION (DEPOSIT)	DISTRIBUTION (WITHDRAWAL)	ACTUAL CASH BALANCE
There are no records to display.					

Activity Details

DATE	DESCRIPTION	AMOUNT	RUNNING BALANCE	NOTES
11/29/2024	Payroll Deduction	\$2,500.00	\$5,000.00	
10/29/2024	Payroll Deduction	\$2,500.00	\$2,500.00	

Contact Us | Example Employee (1) Logout

Home Accounts Tools & Support Message Center

ACCOUNTS PROFILE I WANT TO

- Account Summary
- Account Activity
- Claims
- Payments
- Statements

- Profile Summary
- Banking
- Payment Method
- Login Information

- Reimburse Myself
- Send Payment
- Enroll in HSA

Accounts / Account Summary

The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits.

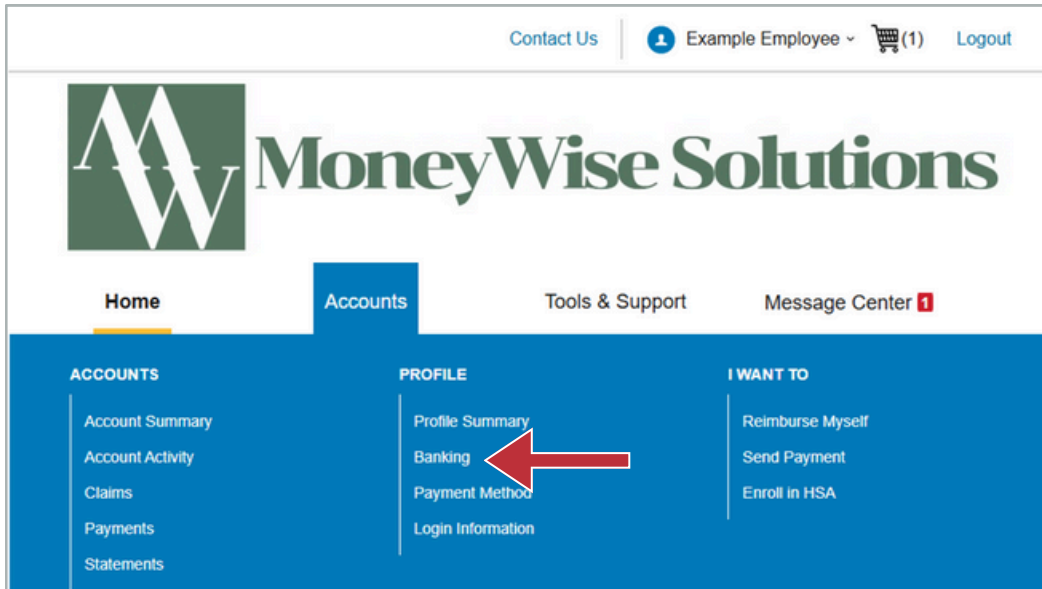
Test Notional Accounts ESTIMATED PER PAY PERIOD DEDUCTION: \$2,670.00

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
- Medical FSA	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00
Election Details		Effective: 10/1/2024		My Contributions to Date: \$100.00		
		My Annual Election: \$100.00		Estimated Payroll Deductions: \$50.00		
		Company Contribution to Date: \$0.00		Plan Year Balance: \$100.00		
+ DependentCare FSA	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000.00
+ Mass Transit	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00
+ Parking	\$40.00	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00

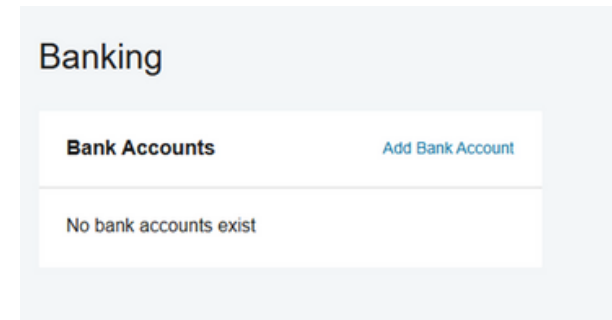
Add Banking for Direct Deposit

All claim reimbursements will default to paper checks unless you add a bank account and update your payment method to direct deposit.

1. From the Account Tab, Select Banking



2. Select Add Bank Account



3. Complete all Required Fields to Add Bank Account. Then click **Submit**.

The screenshot shows the 'Banking / Add Bank Account' form. It is divided into two sections: 'Bank Account Information' and 'Bank Institution Information'. The 'Bank Account Information' section includes fields for 'Routing Number', 'Account Number', 'Confirm Account Number', 'Account Type' (a dropdown menu with 'Checking' selected), and 'Account Nickname'. The 'Bank Institution Information' section includes fields for 'Bank Name', 'Bank Address', and a 'Select a state' dropdown menu. All required fields are marked with an asterisk and a yellow dot. At the bottom of the form, there are 'Cancel' and 'Submit' buttons.

Direct Deposit

Once you have added a bank account you must then change your Payment Method to Direct Deposit.

1. From the Account Tab, Payment Method

Contact Us | Example Employee (1) | Logout

MoneyWise Solutions

Home | Accounts | **Tools & Support** | Message Center 1

- ACCOUNTS
 - Account Summary
 - Account Activity
 - Claims
 - Payments
 - Statements
- PROFILE
 - Profile Summary
 - Banking
 - Payment Method**
 - Login Information
- I WANT TO
 - Reimburse Myself
 - Send Payment
 - Enroll in HSA

2. Select Update

Profile / Payment Method

Current Payment Method

PLAN YEAR	ACCOUNT(S)	PRIMARY	ALTERNATE	
10/01/2024 - 11/30/2024	Medical FSA DependentCare FSA Mass Transit Parking	Direct Deposit	-	Update

3. Update Payment Method

Click **Direct Deposit**

Click **Submit**


Payment Method / Update Payment Method

Primary Payment Method

Direct Deposit
Signing up for direct deposit will allow your disbursements to be deposited in your designated bank account.

Check
A reimbursement check will be sent via U.S. mail based on your normal reimbursement schedule.

Cancel **Submit**

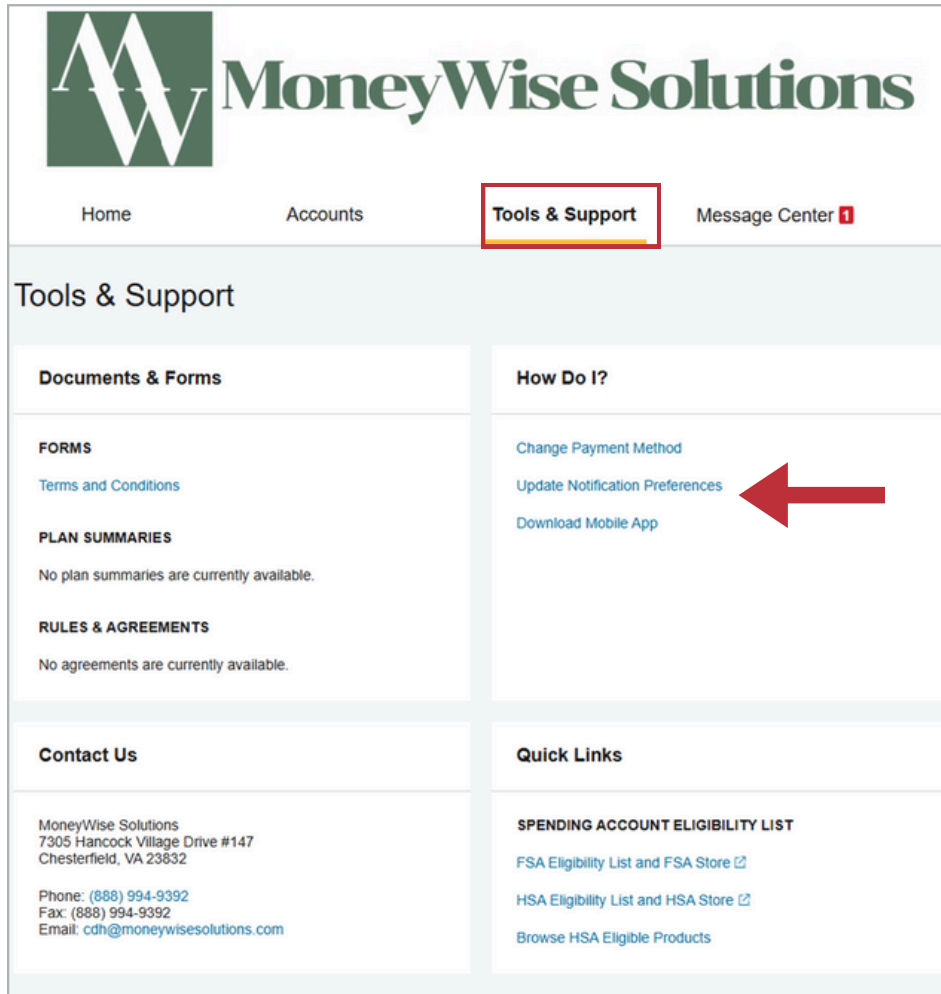
 If you change your Payment Method to Direct Deposit before adding your banking information, you will be prompted to enter your banking details after clicking Submit.

Update Notification Preferences

You can customize how you receive notifications about claims, payments, and more. Choose your preferred delivery method: paper, email, or text.

1. Tools & Support Tab

Click **Update Notification Preferences**



MoneyWise Solutions

Home Accounts **Tools & Support** Message Center 1

Tools & Support

Documents & Forms

FORMS

[Terms and Conditions](#)

PLAN SUMMARIES

No plan summaries are currently available.

RULES & AGREEMENTS

No agreements are currently available.

Contact Us

MoneyWise Solutions
7305 Hancock Village Drive #147
Chesterfield, VA 23832

Phone: (888) 994-9392
Fax: (888) 994-9392
Email: cdh@moneywisesolutions.com

How Do I?

[Change Payment Method](#)

[Update Notification Preferences](#)

[Download Mobile App](#)

Quick Links

SPENDING ACCOUNT ELIGIBILITY LIST

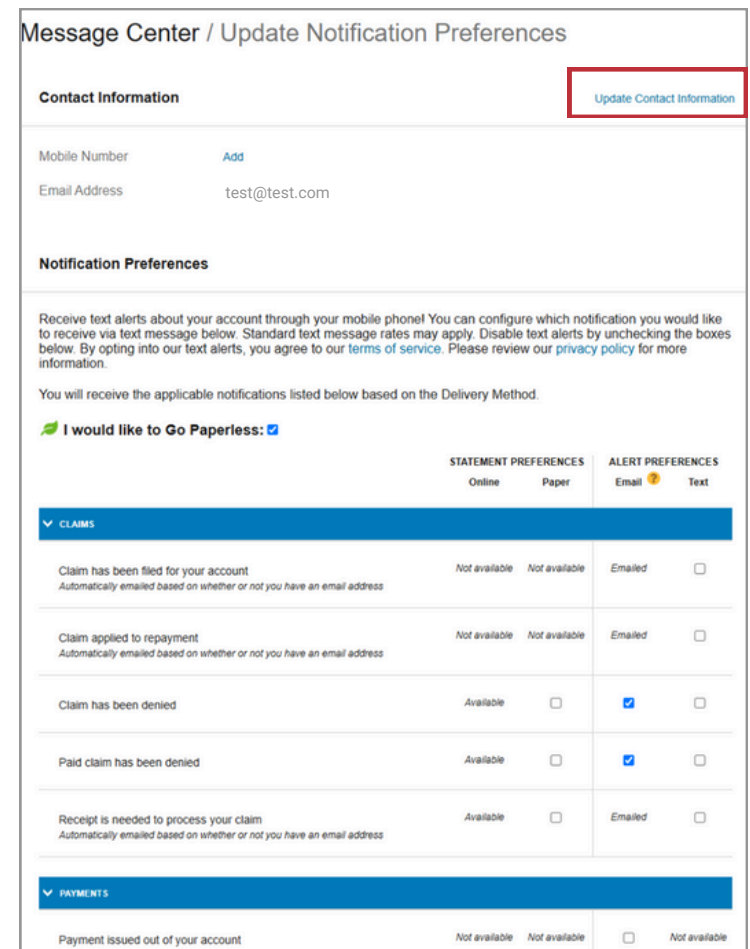
[FSA Eligibility List and FSA Store](#)

[HSA Eligibility List and HSA Store](#)

[Browse HSA Eligible Products](#)

2. Update all **Preferences**, then click **Submit** at bottom of page.

You can select Update Contact Information to change or add a Mobile Phone Number or Email.



Message Center / Update Notification Preferences

Contact Information [Update Contact Information](#)

Mobile Number [Add](#)

Email Address test@test.com

Notification Preferences

Receive text alerts about your account through your mobile phone. You can configure which notification you would like to receive via text message below. Standard text message rates may apply. Disable text alerts by unchecking the boxes below. By opting into our text alerts, you agree to our [terms of service](#). Please review our [privacy policy](#) for more information.

You will receive the applicable notifications listed below based on the Delivery Method.

I would like to Go Paperless:

	STATEMENT PREFERENCES		ALERT PREFERENCES	
	Online	Paper	Email	Text
CLAIMS				
Claim has been filed for your account <small>Automatically emailed based on whether or not you have an email address</small>	Not available	Not available	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Claim applied to repayment <small>Automatically emailed based on whether or not you have an email address</small>	Not available	Not available	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Claim has been denied	Available	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Paid claim has been denied	Available	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Receipt is needed to process your claim <small>Automatically emailed based on whether or not you have an email address</small>	Available	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PAYMENTS				
Payment issued out of your account	Not available	Not available	<input type="checkbox"/>	<input type="checkbox"/>