EMPLOYER PORTAL QUICKSTART GUIDE

Welcome to Davevic Benefit Consultants, Inc. Employer Portal. This one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs) .

The Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- View current and prior year plan information
- Access forms and documents
- Retrieve over 50 scheduled reports or notifications
- View real-time individual participant account summary and balances, enrollments, contributions, claims and payments
- Access history of reports and notifications
- View plan rules

And, user access levels are role-based. Each role determines access rights not only to administrative pages and operations, but also to underlying data in applicable reports.

HOW DO I GET ACCESS TO THIS PORTAL?

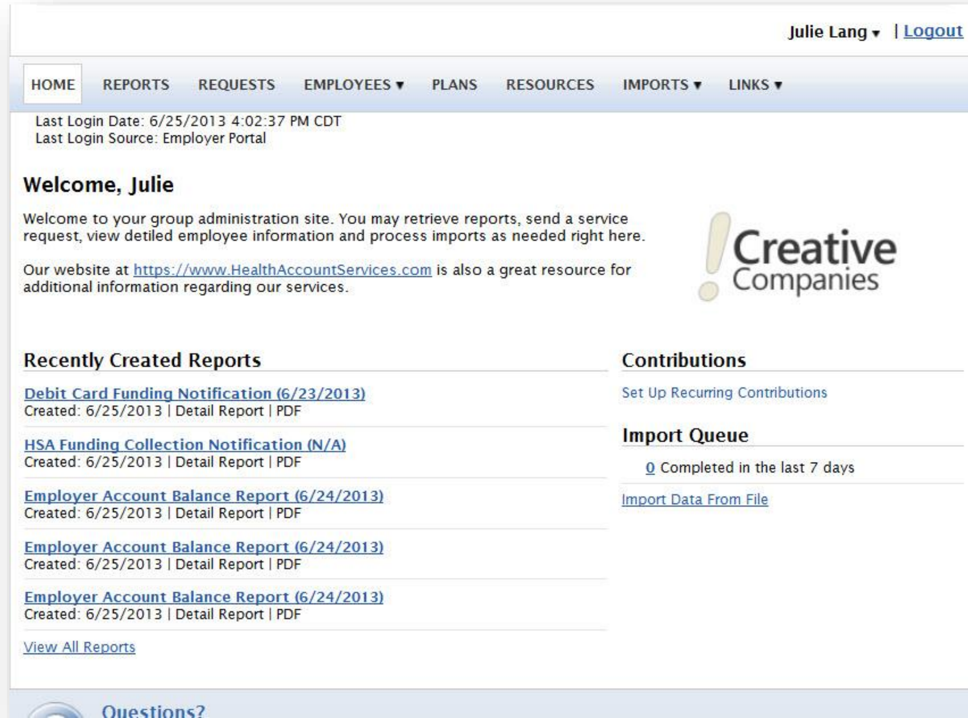
1. You and your assigned contacts will be sent a username and a temporary password.
2. Upon first login, you will be prompted to change the password.
3. Once password is updated and confirmed, click **Login**

The **Home Page** is easy to navigate:

Once you're logged on, everything you need to efficiently and effectively manage your CDH Accounts is found on the home page. You will see a history of the reports and notifications with quick links to the latest versions. From the home page, you can:

- View employee level data.
- Check on status of file imports
- Log requests
- Read plan documents
- Download forms

You can also access the tabs at the top of the page or links at the bottom of the page for easy navigation.



WILL I BE ABLE TO ACCESS ANY OF MY PLAN INFORMATION?

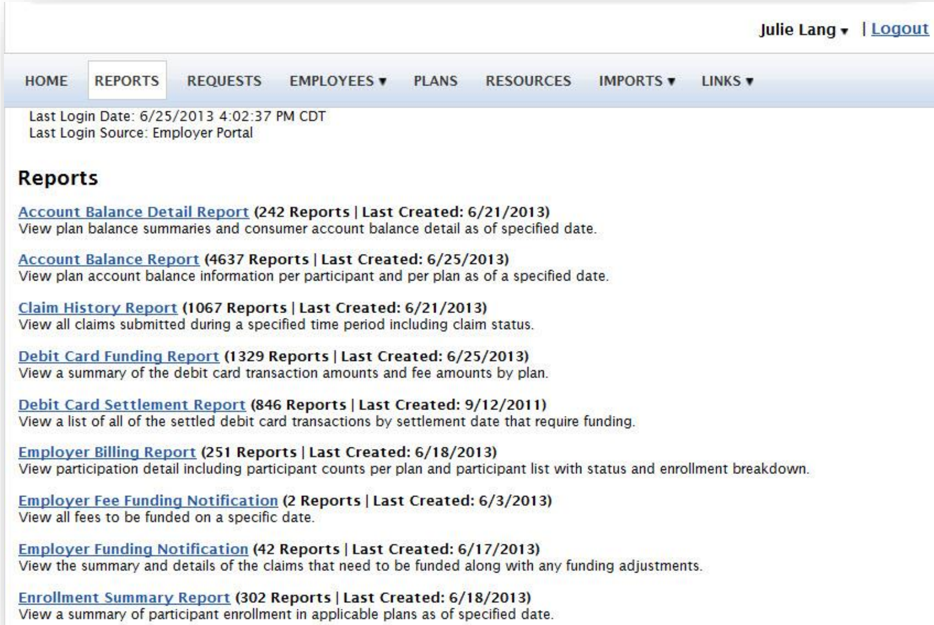
1. Under the **Plans** tab, you will find options to view the same info as the employees for all active and inactive plans.
2. Information available is:
   - Plan Summaries
   - Plan Details and Rules
   - Documents

WHERE WOULD I ACCESS REQUIRED FORMS?

1. Under the **Resources** tab.
2. In this section you can download and print any forms needed.
3. You will also have access to any other documents or custom materials related to your plans in this tab.

HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. On the **Home Page**, under the **Reports** tab, there will be a list of all available reports that can be viewed.
2. Simply select the relevant enrollment, financial, contribution or plan information report desired and it will automatically be displayed.
3. If there is a report that you need, but do not see, you can contact Davevic Benefit Consultants to request it.



WHAT KIND OF EMPLOYEE-LEVEL DATA CAN I ACCESS?

1. Under the tab titled **Employees**, you can get real-time data on all enrolled employees.
2. You can search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access the following information:
   a. Account Summary
   b. Demographics
   c. Account Balances
   d. Enrollments
   e. Contributions
   f. Claims
   g. Payments
   h. Status