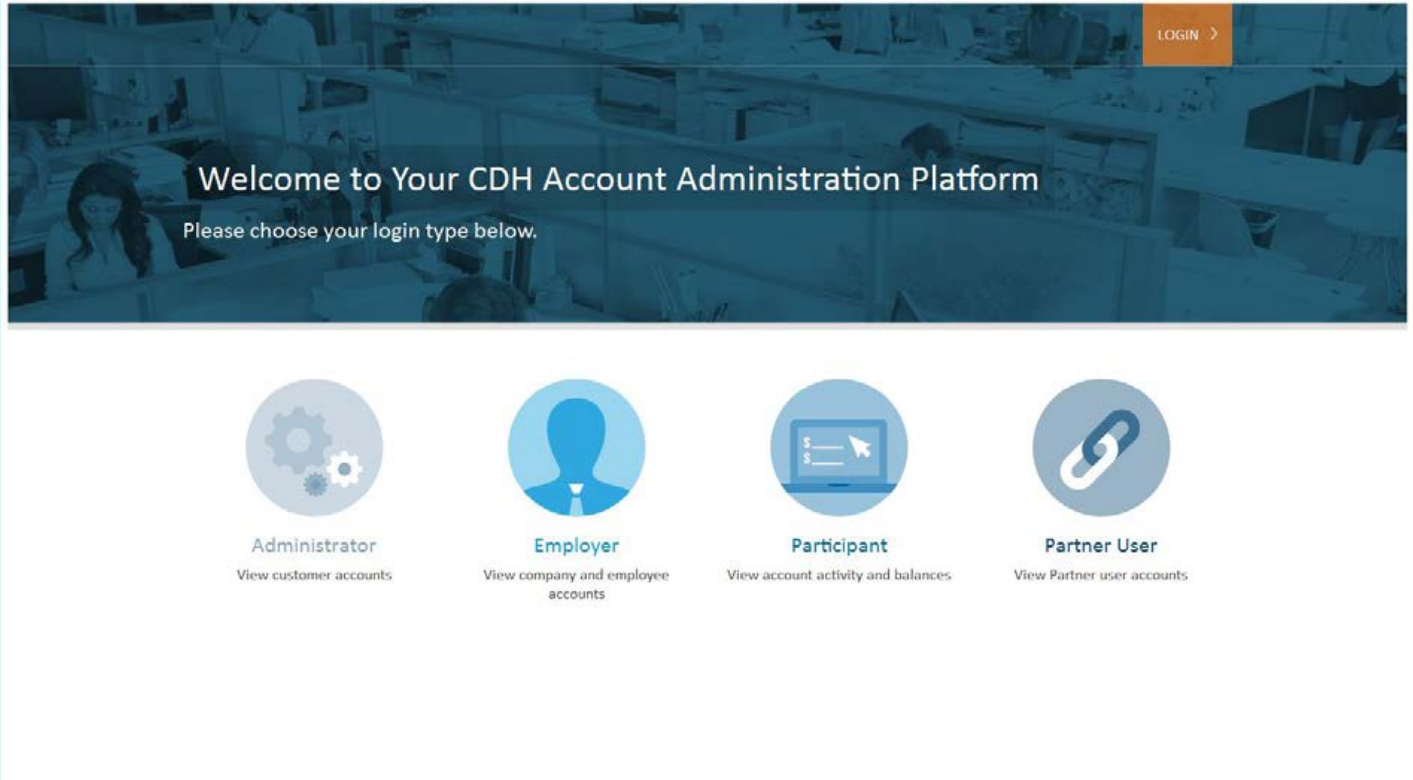
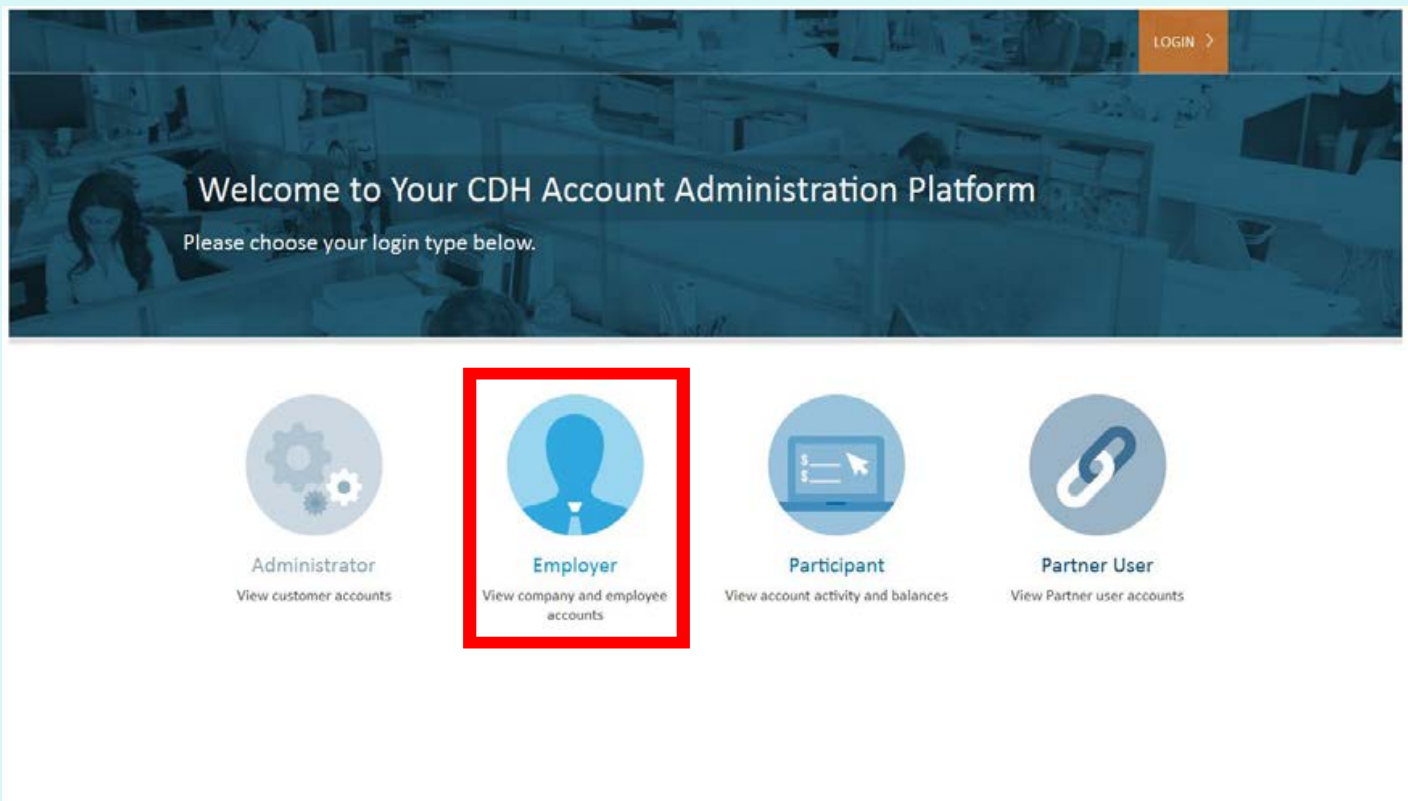


How To Add a Dependent to a Employee's Profile

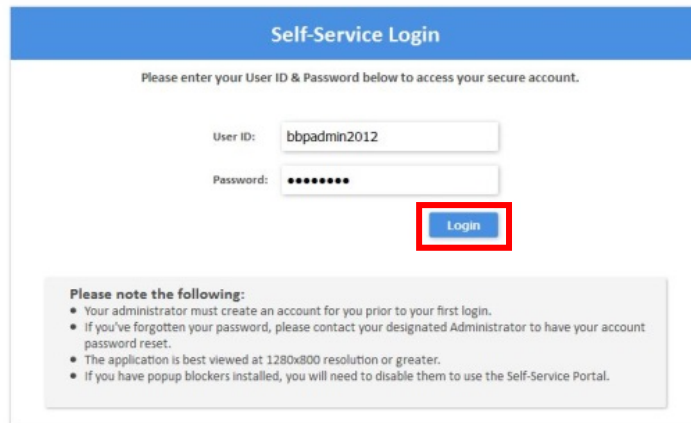
1. Go to <https://www.cdha.com>



2. Click on the “Employer” button.



3. The put in your User ID and Password then click the “Login” button.



Self-Service Login

Please enter your User ID & Password below to access your secure account.

User ID:

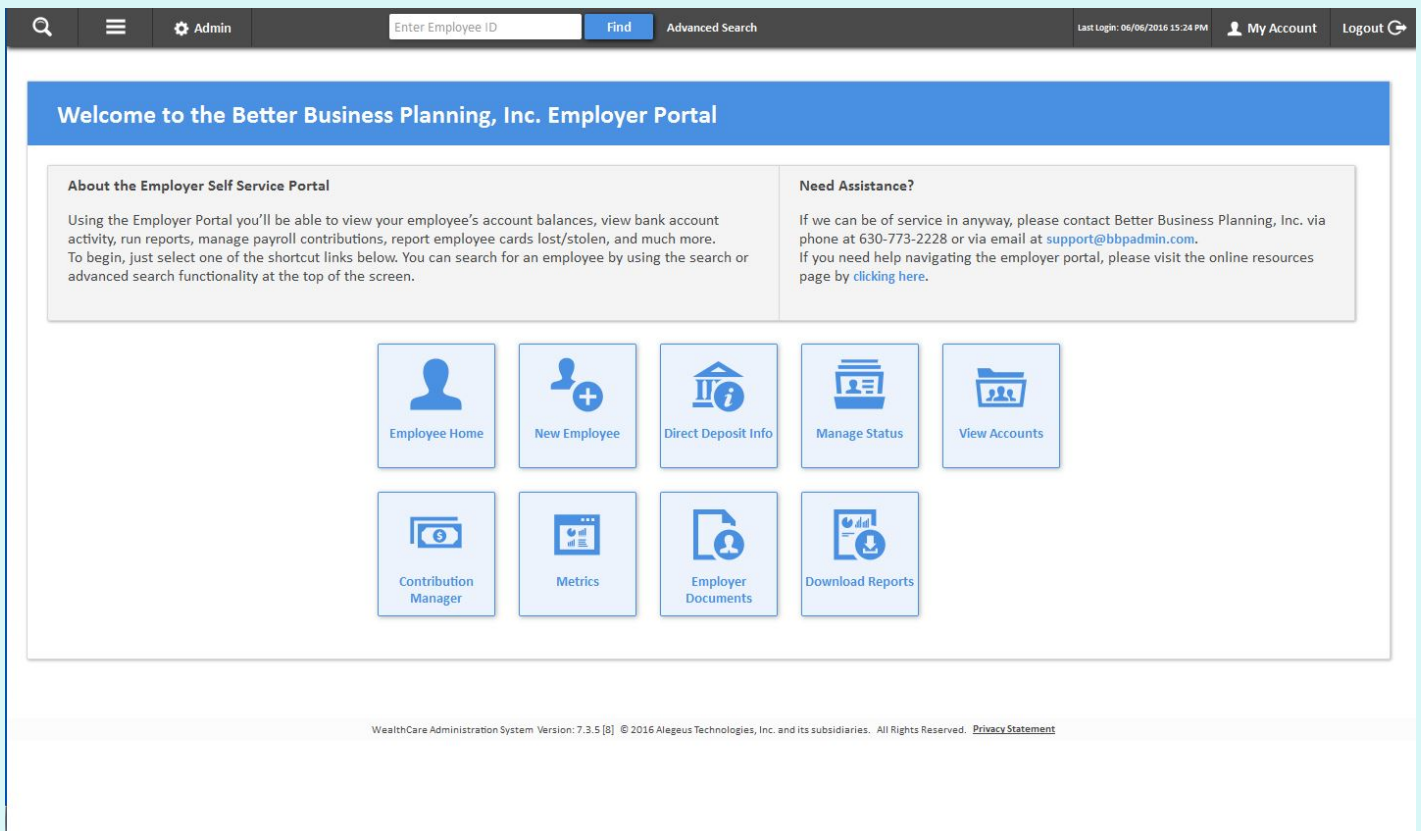
Password:

Login

Please note the following:

- Your administrator must create an account for you prior to your first login.
- If you've forgotten your password, please contact your designated Administrator to have your account password reset.
- The application is best viewed at 1280x800 resolution or greater.
- If you have popup blockers installed, you will need to disable them to use the Self-Service Portal.

4. You are now on your Employer Portal home screen.



Welcome to the Better Business Planning, Inc. Employer Portal

About the Employer Self Service Portal

Using the Employer Portal you'll be able to view your employee's account balances, view bank account activity, run reports, manage payroll contributions, report employee cards lost/stolen, and much more. To begin, just select one of the shortcut links below. You can search for an employee by using the search or advanced search functionality at the top of the screen.

Need Assistance?

If we can be of service in anyway, please contact Better Business Planning, Inc. via phone at 630-773-2228 or via email at support@bbpadmin.com. If you need help navigating the employer portal, please visit the online resources page by [clicking here](#).

Employee Home **New Employee** **Direct Deposit Info** **Manage Status** **View Accounts**

Contribution Manager **Metrics** **Employer Documents** **Download Reports**

WealthCare Administration System Version: 7.3.5 [8] © 2016 Alegeus Technologies, Inc. and its subsidiaries. All Rights Reserved. [Privacy Statement](#)

5. Click the “Magnifying Glass” to search for an employee.

EMPLOYEE HOME SCREEN

SEARCH BY: Last Name, First Name

Smith, Amy

Find

EMPLOYEE NAME	EMPLOYEE ID	STATUS
Smith, Amy	ASMITH	Active

BILLING ADDRESS: 125 W. Orchard St. Itasca, IL 60143

DEPENDENTS: Yes

EMPLOYER NAME	EMPLOYER ID	STATUS
BizAssure	BBPBIZASSURE	Active

6. After clicking “Magnifying Glass” you are brought to the “Employee Home Screen”.

EMPLOYEE HOME

Employee does not have account(s) for the selected plan year.

Smith, Amy		DETAILS	DEPENDENTS	NOTES
EMPLOYEE ID	ADMINISTRATOR	EMPLOYER	EMPLOYER ID	STATUS
ASMITH	Better Business Planning, Inc.	BizAssure	BBPBIZASSURE	Active
STATUS	ELIGIBILITY DATE	TERMINATION DATE	USER ID	REIMBURSEMENT METHOD
Active			krotbbp2016	Check

Home Demographics Accounts Cards Statuses History Enter Claim Enter Deposit

Accounts

Plan Year: Current

Existing Cards

Recent Transactions View Transactions History

Recent Reimbursements View Reimbursement Details

Recurring Payments

Medicare Detail

7. On the Employee Home screen, click on the “Dependents” tab.

EMPLOYEE

Employee Home

Employee does not have account(s) for the selected plan year.

Smith, Amy		DETAILS	DEPENDENTS	NOTES
EMPLOYEE ID ASMITH	ADMINISTRATOR Better Business Planning, Inc.	EMPLOYER BizAssure	EMPLOYER ID BBPBZASSURE	STATUS Active
STATUS Active	ELIGIBILITY DATE	TERMINATION DATE	USER ID krotibbp2016	REIMBURSEMENT METHOD Check

Home Demographics Accounts Cards Statuses History Enter Claim Enter Deposit

Accounts ▲

Plan Year: Current ▾

Existing Cards ▼

Recent Transactions [View Transactions History](#) ▼

Recent Reimbursements [View Reimbursement Details](#) ▼

Recurring Payments ▼

Medicare Detail ▼

WealthCare Administration System Version: 7.3.5 [10] © 2016 Alegeus Technologies, Inc. and its subsidiaries. All Rights Reserved. [Privacy Statement](#)

8. On this screen, Click the “Add New Dependent” button

EMPLOYEE

Employee Home

Smith, Amy		DETAILS	DEPENDENTS	NOTES	
NAME	ID	STATUS	PRIMARY CARD#	SSN#	DOB
Roti, fred	FROTI	New			
Roti, Sally	SROTI	New			

Home Demographics Accounts Cards Statuses History Enter Claim Enter Deposit

Accounts ▲

Plan Year: Current ▾

Existing Cards ▼

Recent Transactions [View Transactions History](#) ▼

Recent Reimbursements [View Reimbursement Details](#) ▼

Recurring Payments ▼

Medicare Detail ▼

WealthCare Administration System Version: 7.3.5 [1] © 2016 Alegeus Technologies, Inc. and its subsidiaries. All Rights Reserved. [Privacy Statement](#)

- Fill in all the required information in the “Demographic Information” section. After you’ve entered all of the information, scroll down and click the “Save” button.

New Dependent

Smith, Amy

DETAILS		DEPENDENTS		NOTES	
EMPLOYEE ID ASMITH	ADMINISTRATOR Better Business Planning, Inc.	EMPLOYER BizAssure	EMPLOYER ID BBPBIZASSURE	STATUS Active	
STATUS Active	ELIGIBILITY DATE	TERMINATION DATE	USER ID krotlbbp2016	REIMBURSEMENT METHOD Check	

Home Demographics Accounts Cards Statuses History Enter Claim Enter Deposit

Existing Dependents

Dependent	Employer	ID	Card #	Dependent Status
Rott, fred	BizAssure	FROTI		New
Rott, Sally	BizAssure	SROTI		New

2 dependents found.

Demographic Information

Name Prefix: Mr. First Name*: David Initial: Last Name*: Evans

Dependent ID*: DEVANS Dependent Status: New

Address: Copy Employee Address

Address 1*: 40 Unamed St.
Address 2:
City*: Hoffman Estates State*: Illinois Zip Code*: 60195
Country*: United States
Phone: 8478390644

Is Card Shipping Address different from the above?

Eligibility Date: Birth Date: 5/23/1960 Termination Date: Gender: Male

Relationship: Spouse or Common Law Spouse Full time student?: Yes No

- After you’ve clicked the “Save” button, a green text will appear showing that the employee’s dependent was added successfully.

New Dependent

Dependent Added Successfully. Please click on the links below.

Smith, Amy

DETAILS		DEPENDENTS		NOTES	
EMPLOYEE ID ASMITH	ADMINISTRATOR Better Business Planning, Inc.	EMPLOYER BizAssure	EMPLOYER ID BBPBIZASSURE	STATUS Active	
STATUS Active	ELIGIBILITY DATE	TERMINATION DATE	USER ID krotlbbp2016	REIMBURSEMENT METHOD Check	

Home Demographics Accounts Cards Statuses History Enter Claim Enter Deposit

Dependent	Card	Flex Account	Dependents
Evans, David	Add Card	Add Flex Account	Add Dependent

WealthCare Administration System Version: 7.3.5 [2] © 2016 Alegeus Technologies, Inc. and its subsidiaries. All Rights Reserved. [Privacy Statement](#)

11. Click on the “Dependent” tab, and you’ll see the new dependent added to the list of dependents.

The screenshot displays the 'EMPLOYEE Home' page for Amy Smith. The 'DEPENDENTS' tab is active, showing a table of dependents. A red box highlights the entry for David Evans, who is a new dependent with a date of birth of 5/23/1960. Below the table are buttons for 'Add New Dependent' and 'Add Dependent Account'. The page also features a navigation bar with options like Home, Demographics, Accounts, Cards, Statuses, History, Enter Claim, and Enter Deposit. At the bottom, there are sections for Accounts, Existing Cards, Recent Transactions, Recent Reimbursements, Recurring Payments, and Medicare Detail. The footer contains the text: 'WalthCare Administration System Version: 7.3.5 [2] © 2016 Alegeus Technologies, Inc. and its subsidiaries. All Rights Reserved. [Privacy Statement](#)'.

NAME	ID	STATUS	PRIMARY CARD#	SSN#	DOB
Roti, Fred	FROTI	New			
Roti, Sally	SROTI	New			
Evans, David	DEVANS	New			5/23/1960

Thank you for choosing BP Admin!