

# How to Navigate the Remotiv Portal and view the Savings Modules

## Overview

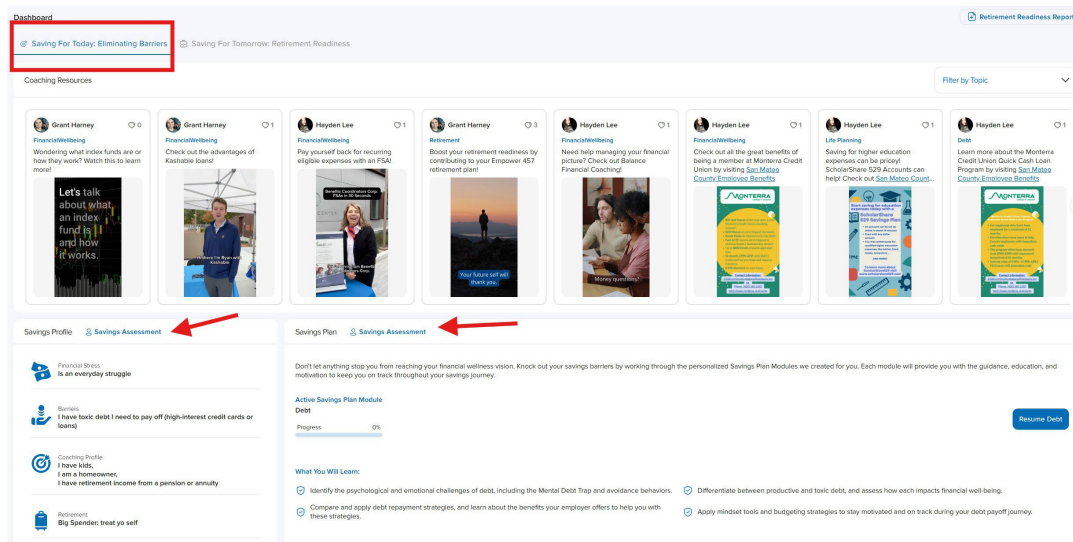
San Mateo County has partnered with Remotiv to provide a financial well being tool designed to meet participants where they are financially. Your dashboard and tools are personalized based on your Savings Assessment responses.

**Note: You do not need a Remotiv Token to access the Portal or register. Simply go to OKTA and click Remotiv to access your account.**

## Step 1: Complete the Savings Assessment

You should be prompted to take the Savings Assessment when you first access the Remotiv Platform. If you have already completed it, you can always retake it by going to:

[Saving for Today: Eliminating Barriers Dashboard](#)  
and selecting the Savings Assessment Links shown below.



The Savings Assessment determines which Savings Plan Modules appear. You may select all the barriers that apply.

To help personalize your savings plan, tell us which savings barriers apply to you.

Select all that apply

I live paycheck to paycheck and can't afford to save

I have toxic debt I need to pay off (high-interest credit cards or loans)

I need to build up my emergency savings

I'm saving for a large purchase (home, car, etc.)

I have life planning needs or expenses to consider (life insurance, growing family, caregiver, etc.)

None of these saving barriers apply to me. I am focused on growing my wealth and maximizing my retirement planning

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If no barriers are selected during your assessment as shown below, you will receive a Focused on Saving module that will provide additional information on the employee benefits available to you.

To help personalize your savings plan, tell us which savings barriers apply to you.

Select all that apply

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I have life planning needs or expenses to consider (life insurance, growing family, caregiver, etc.)

None of these saving barriers apply to me. I am focused on growing my wealth and maximizing my retirement planning

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Overview of the Savings Module after selecting “None of these saving barriers apply to me. I am focused on growing my wealth and maximizing my retirement planning.”

Savings Plan Savings Assessment

Don't let anything stop you from reaching your financial wellness vision. Knock out your savings barriers by working through the personalized Savings Plan Modules we created for you. Each module will provide you with the guidance, education, and motivation to keep you on track throughout your savings journey.

Active Savings Plan Module

Focused on Saving

Progress 0%

Resume Focused on Saving

What You Will Learn:

How to access your employee benefits

How Remotiv's coaching stories can help you stay on track financially

Skills You Will Gain:

Financial Mindset

Related Benefit Links:

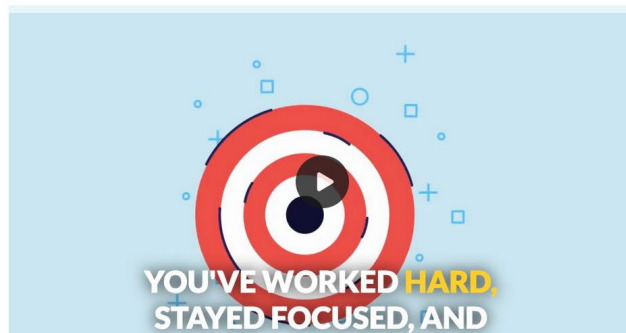
BALANCE Financial Counseling

Voluntary Legal Plan for Wills and Estate Planning

Flexible Spending Account (FSA)

ScholarShare 529 Workplace: College Savings Program

Savings Plan Modules Focused on Saving

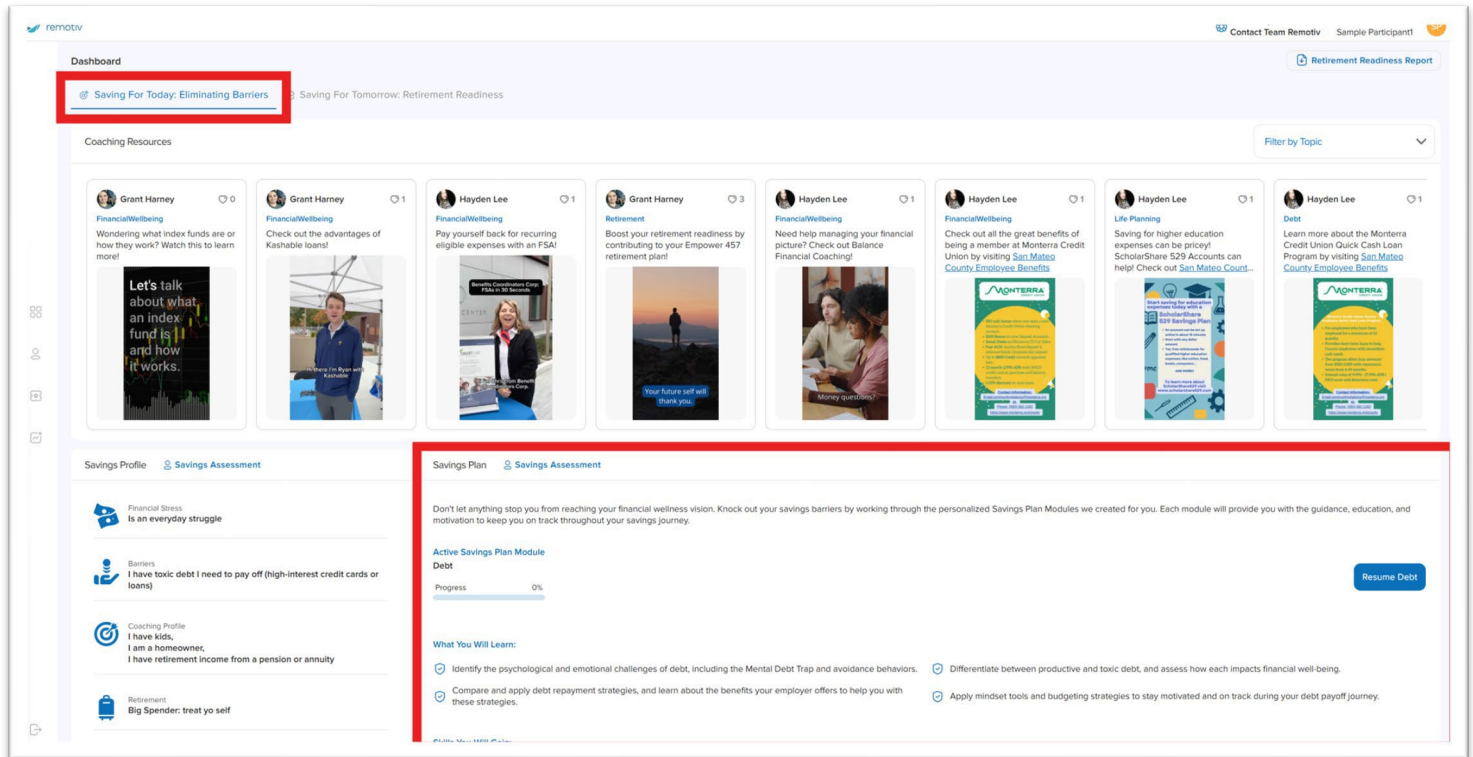


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## Step 2: Viewing your Savings Dashboard and Understanding Savings Plan Modules

Navigate to 'Saving for Today: Eliminating Barriers.' Here you may see Coaching Resources, your Savings Profile, and a Savings Plan section depending on your assessment results.

Savings Plan Modules only appear based on the barriers you selected in the assessment that are relevant to you. They include progress tracking, educational guidance, and practical tools.



## Why the Experience Is Personalized

Remotiv avoids a one-size-fits-all approach. The platform adapts as your needs change, and you may retake the Savings Assessment at any time.

## Need Help?

Support is available through the Remotiv Support Portal ([support.remotiv.com](https://support.remotiv.com)) if you have questions or need guidance.