CBIZ CONSUMER PORTAL QUICKSTART GUIDE
myplans.cbiz.com

Welcome to your CBIZ Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your account based plans.   It enables you to:

- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Report a lost/stolen Card and request a new one
- Update your personal profile information
- Change your login ID and/or password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:
1. Work from sections within the Home Page,
2. Hover over or click on the six tabs at the top.

HOW DO I LOG ON TO HOME PAGE?

1. Go to myplans.cbiz.com
2. Click on "Create your new username and password".
3. Follow instructions for creating login

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

- Easily access the **Available Balance** and **"I Want To"** sections from the left-hand navigation area.
- The **I Want To**...section contains the most frequently used options within the Consumer Portal.
- In the left-hand column Available **Balance** links to the Account Summary page, where you can see and manage your accounts.
- The **Message Center** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Quick View** section graphically displays some of your key account information.

You can also hover over the tabs at the top of the page.

Home   Dashboard   Accounts   Tools & Support   Profile   Message Center

Welcome

We're Making it Easy to Manage Your Healthcare Expenses

I Want To:

Manage My Expenses

Accounts

No available account balances.
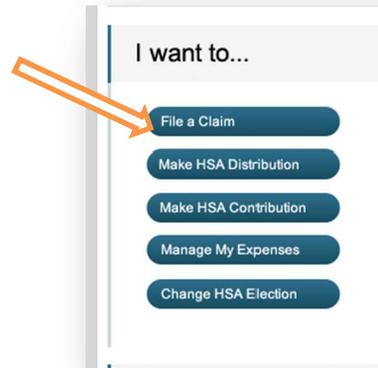
Tasks 0

No current Tasks.

Quick View

No views available.

HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select the "I want to… **File a Claim**" button. **OR** on the Home **Page**, under the **Accounts** tab, click **File Claims** link.

2. Enter your claim information, and upload the receipt, on the form that appears and click **Add Claim**. The claim is then added to the **Claims Basket**.

3. For submitting more than one claim, click **Add Another Claim**, select the Account Type and complete the form and click **Add Claim**.

4. When all claims are entered in the **Claims Basket**, click **Submit** to send the claims for processing.

5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a receipt, print another Claim **Confirmation Form** to submit to the administrator, attaching the required receipts. **OR** if a receipt is required, you will see the **Upload Receipt** link. Click on it and the **Receipts Needed** screen displays.

6. For each claim that requires a receipt, click **Upload Receipt** on the far right and follow instructions. (Your receipt must be in pdf, jpg, or gif format.)

7. The Receipt Uploaded confirmation appears: "Your receipt has been uploaded. You may upload additional receipts if needed until the claim is approved."

I want to...

- File a Claim
- Make HSA Distribution
- Make HSA Contribution
- Manage My Expenses
- Change HSA Election

Home   Dashboard   **Accounts**   Tools & Support   Profile   Message Center   I Want to: ▼

Account Summary

Account Activity

Claims

Payments

Statements

Accounts / Account Summary

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

PY 2018-01-01 - 2018-12-31

PY 2017-01-01 - 2017-12-31

PY 2016-01-01 - 2016-12-31

PY 2015-01-01 - 2015-12-31

PY 2014-01-01 - 2014-12-31

PY 2013-01-01 - 2013-12-31

Estimated Per Pay Period Deduction: $0.00

8. After uploading, you may also click **View Confirmation** and print the form for your records.

NOTE: If you see a **Receipts Needed** link in the Message Center section of your Home Page, click on it. A listing of any **Claims Requiring Receipts** will appear.

HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Available Balance** section.
2. For all Account Activity, on the **Home Page**, click on the **Available Balance** link to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under "Eligible Amount" to view enrollment detail.

⊟ 1/1/2013-12/31/2013							
Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Plan Year Balance	Available Balance
Health FSA	$1,100.00	$185.07	$108.20	$16.87	$60.00	$974.93	$974.93
HRA 2013	$416.66	$0.00	$0.00	$0.00	$0.00	$416.66	$416.00
Incentive Account	$1,500.00	$0.00	$0.00	$0.00	$0.00	$1,500.00	$50.00

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. On the **Home Page**, under the **Accounts** tab, click **Payment History** on the drop-down menu. You will see reimbursement payments made to date, including debit card transactions.
2. Click **View Detail** on the far right to see claim details.

HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. On the **Home Page**, under the **Profile** tab, click **Debit Cards** on the drop-down menu.
2. Under the Actions column on the Debit Cards form, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.

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HOW DO I UPDATE MY PERSONAL PROFILE? *Keep in mind that a file feed from your employer may override any changes. Be sure to update your profile with your employer*

1. On the **Home Page**, under the **Profile** tab, click your choice on the drop-down menu: **Profile, Banking or Login Information.**
2. Click any link on the Profile screen: **Update Profile** or **Add/Update Dependent** or **Add Beneficiary.** Some profile changes will require you to answer an additional security question.
3. Complete your changes in the form.
4. Click **Submit**.

HOW DO I GET MY REIMBURSEMENT FASTER?

The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit setup online.

1. On the **Home Page**, under the **Accounts** tab, click **Change Payment Method** on the drop-down menu.
2. Select **Direct Deposit** and click **Change Payment Method**. The **Add Bank Account: Direct Deposit Setup** page displays.
3. Enter your bank account information, and click **Submit**. Note: First direct deposit will be subject to a successful prenote of account.
4. The **Payment Method Changed** confirmation displays.

HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. On the **Home Page**, click on the **Profile** tab, and select **Login Information** on the left-hand side of the screen.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click **Save**.

HOW DO I VIEW OR ACCESS…
   …DOCUMENTS & FORMS?
1. On the **Home Page**, use the **Tools & Support** tab.
2. Click any form or document of your choice.

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…NOTIFICATIONS?

1. On the **Home Page**, under the **Statements & Notifications** tab, click the **Statements & Notifications** tab.
2. Click any link of your choice. **Receipt Reminders**, **Account Statements**, **Advice of Deposits**, **Denial Letters**, or **Denial Letters with Repayments** are a few options.

…PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts** tab, click **Account Summary** on the drop-down menu.
2. Click the applicable account in the first column on the left and the **Plan Rules** open in another browser
   OR on the **Home Page**, under the **Accounts** tab, click **Plan Descriptions** on the drop-down menu for basic information. Then click each applicable plan to see the Plan Detail screen.

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