



## Flexible Spending Online Enrollment

**PLEASE NOTE: You must complete your enrollment prior to the enrollment deadline provided by your employer or you will miss your opportunity to participate in the program.**

### Current enrollees/participants who have been in the plan before:

- Go to <https://myplans.cbiz.com>
- If you have not registered before; select “New User Registration” or
- If you have registered or are not sure; select “Forgot Password”
- Step 1:
  - First Name
  - Last Name
  - Social Security Number
  - Zip Code
- Step 2:
  - Create 3 security questions and answers (these will be asked if you need to reset password in the future)
- Step 3:
  - Create username and password (in real-time)

### New enrollees/participants who have NOT been in the plan:

- Go to <https://myplans.cbiz.com>; under “Setting Up New Account” enter CODE: BIS-B04934

**Login**

**Existing User?**  
Login to your account

Username  [Forgot Username?](#)

Password  [Forgot Password?](#)

**Setting up a New Account?**  
It's easy to apply for a new account. Click 'Get Started' below to begin.

**New User?**  
[Create your new username and password](#)

- Complete required fields to self-register. Once you are logged in follow the steps below to enroll.

### Step 1 of 8:

After you log in, click the “Enroll Now” button towards the middle of the home page.

I Want To:

[Enroll Now](#) [Manage My Expenses](#)

### Step 2 of 8:

Review the plans you are eligible for and click the “Begin Your Enrollment Now” button when ready.

HOME EXPENSES ACCOUNTS TOOLS & SUPPORT STATEMENTS & NOTIFICATIONS PROFILE Testy Testerson | [Logout](#)

**Enrollment**

Are you ready to enroll? [Begin Your Enrollment Now](#)

Enrolling in a Pre-Tax Benefit plan allows you to save Federal, State, Social Security and Medicare taxes on dollars you put into the plan. You could save approximately 30% on every plan dollar you spend, depending on your tax bracket.

Review your available plans to find out how to best use these programs. To learn more about the benefits offered, click on the appropriate Plan Description link below.

### Step 3 of 8:

First, verify/update your profile and click “continue”.

### Step 4 of 8:

Then, check each acknowledgement box once you understand the plans available and click “continue”.

**2020 Medical Reimbursement Expense**

The Medical Flexible Spending Account allows employees to pay for certain eligible medical expenses that are not covered by insurance with pre-tax dollars.

The EBIA link under Tools & Support, Quick Links is a helpful tool that identifies types of expenses that are covered under the Medical Flexible Spending Account. This will assist you in making a better decision on your election for the upcoming plan year.

Reminder - As of January 1, 2011, over-the-counter (OTC) drugs, medicines and biologicals will continue to be eligible for reimbursement as long as the request is accompanied by a doctor's prescription. This means items such as cough medicines, pain relievers, acid controllers, and diaper rash ointment will now require a doctor's prescription to be submitted along with the reimbursement request. Insulin and select OTC items, such as band-aids, will continue to be eligible without a prescription

I have read and understand the [2020 Medical Reimbursement Expense rules](#)

### Step 5 of 8:

Enter in the desired election for each plan that you wish to enroll in. Do note that some elections are *annual* and some are *monthly*. For plan(s) that you do not wish to enroll, leave the field blank. Click “Continue” when finished.

	Your Election	Max Employee Election
2020 Medical Reimbursement Expense	<input type="text" value="2750"/>	\$2,750.00
** 2020 Dependent Care Reimbursement	<input type="text"/>	\$5,000.00
2020 Transit Reimbursement	<input type="text" value="100"/> /mo	\$270.00 /mo
2020 Parking Reimbursement	<input type="text"/> /mo	\$270.00 /mo
Total election for the year:		<a href="#">Calculate</a>
Total tax savings for the year *:		

\* Tax savings estimate is based on a 30% tax rate. True tax savings will be based on your individual circumstances.  
\*\* You can enroll now, but you must add dependent(s) later in order to file claims.


[Continue](#)

### Step 6 of 8:

Choose the payment method of your reimbursements. If Debit Card is available, you will still have the option to be reimbursed by valid claims, but a card will also be issued in your name. If Direct Deposit is chosen, you will need to enter in your bank information. Click "Continue" when finished.

**Debit Card**

Your Debit Card provides convenient access to your benefit dollars. Use the card to pay qualified medical expenses for you and your qualified dependents.



If you choose to be reimbursed using the Debit Card, please answer the questions below.

1) What alternate reimbursement method would you like to use for the reimbursement of claims that are filed online?

Check

Direct Deposit

Continue

### Step 7 of 8:

Verify your information. You may go back to any previous page by clicking the "Edit Information" button. Once verified, click "Submit".

You must click submit at the bottom of this page to complete your enrollment.

**Profile** Edit Information

Name: Testy Testerson  
Social Security Number: xxx-xx-9101  
Address: 2300 Contra Costa Blvd  
Pleasant Hill, CA 94523  
United States  
Home Phone: (925) 956-0514  
Birth Date: 7/11/1988  
Gender:  
Marital Status: Single  
Email Address: benefits@pensiondynamics.com  
Do you have any dependents? No

**Dependents** Edit Information

No dependents specified.

**Enrollment Elections** Edit Information

	Employee Contribution	Company Contribution
2020 Medical Reimbursement Expense	\$2,750.00	
2020 Dependent Care Reimbursement	\$0.00	
2020 Transit Reimbursement	\$100.00 /mo	
2020 Parking Reimbursement	\$0.00 /mo	
Total Election for the year:		\$3,950.00

**Method of Reimbursement** Edit Information

You have chosen **Debit Card** as your method of payment.  
Your alternate reimbursement method is Direct Deposit.  
Separate debit cards will be issued to the following dependents:  
No dependent debit cards issued

Submit

Cancel

### Step 8 of 8:

You're all set! You may revisit the homepage and review your account at any time. If your plan offers debit cards, one will be mailed to the address provided.