First-Time Online Registration

Please follow these steps to complete the online registration process

First you will need to go to https://myplans.cbiz.com and select “Create your new username and password” that is listed under “New User?” to get started.

New User?

Create your new username and password

Step 1 of 3:
Enter your demographic information, all fields are required. Click “Next” when complete.

- First Name
- Enter Last Name
- Enter Zip Code
- Enter SSN - Employee ID must remain blank

User Identification (Step 1 of 3)

Complete the information below to verify your identity.

*Required

First Name

Last Name

Zip Code

Please enter your 5 digit zip code

SSN or Employee ID

- OR -

Employee ID

Next
Step 2 of 3:
Select 3 Security Questions and Enter/Create Answers on the right side. Select “Next” when completed.

Security Questions (Step 2 of 3)

Please enter an answer to any 3 security questions to complete your user setup. To keep your information secure, you will be asked to answer 3 of these questions to complete sensitive actions within the portal such as resetting a forgotten password.

Select a question...

Select a question...

Select a question...

Step 3 of 3:
You will then be asked to select a Username. This field will be pre-populated with an automatic system generated name, but it can be overwritten at this step.
Fill out your Password: See password requirements below and then confirm the Password. Select “Submit” when completed.

Create Username and Password (Step 3 of 3)

Username* 
Your username may contain alphanumeric characters and any of the following special characters: period (.), at sign (@), underscore (_), and dash (-).

Password* 
The password must:
- Have a minimum of 6 characters
- Not be one of your last 3 passwords
- Contain upper and lowercase letters
- Contain at least one number

Confirm Password* 

You’re all set! You may revisit the homepage and review your account at any time.