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**REIMBURSEMENT ACCOUNT PLAN RENEWAL PORTAL USER GUIDE**

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## Screen: Login Page



The cure for benefits as usual.

Login

### Sign in

  
  
  
[Forgot your password?](#)

**Instructions:** Your User ID is your email address. If you are a first-time user, click the new user option and a temporary password will be sent to your email. You will then be directed to establish a permanent password for the site.

Users will be notified by email for an upcoming renewal. Renewal notification emails are sent at 120, 90, 60 and 30 days prior to the renewal date. The notification email will include the link to the Renewal Portal for easy access.

Reminder: This is separate from your Employer Portal login.

## Screen: Employer Landing Page

Michelle Smith | [Log Out](#)[Home](#)

### Reimbursement Account Plan Renewal

Show  entriesSearch: 

Employer Name	Next Renewal Date	Status
<a href="#">Demo Employer1</a>	06/01/2021	Available For Renewal

Showing 1 to 1 of 1 entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

**Instructions:** The Employer landing page will show all employers linked to the user. Employer names will show in chronological order with the next pending renewals first. Users can search for an Employer, reorder the list by Employer Name, Next Renewal Date or Status, or use the navigation buttons at the bottom of the screen to scroll through the list of employers.

## Screen: Employer Demographics Page



Michelle Smith | [Log Out](#)

[Home](#) > [Employer Details](#)

### Reimbursement Account Plan Renewal

[Return to Employer Search](#)

#### — Employer Details

Employer Name	Demo Employer1
EIN	17-1234567
Address	Lifetime Benefit Solutions 333 Butternut Syracuse, NY, 13214
Debit Card	<input type="radio"/> No <input checked="" type="radio"/> Yes
Claims Exchange/ACT	<input checked="" type="radio"/> No <input type="radio"/> Yes

#### LBS Reimbursement Contact

**Sample Contact**  
email: sample.contact@lifetimebenefitsolutions.com

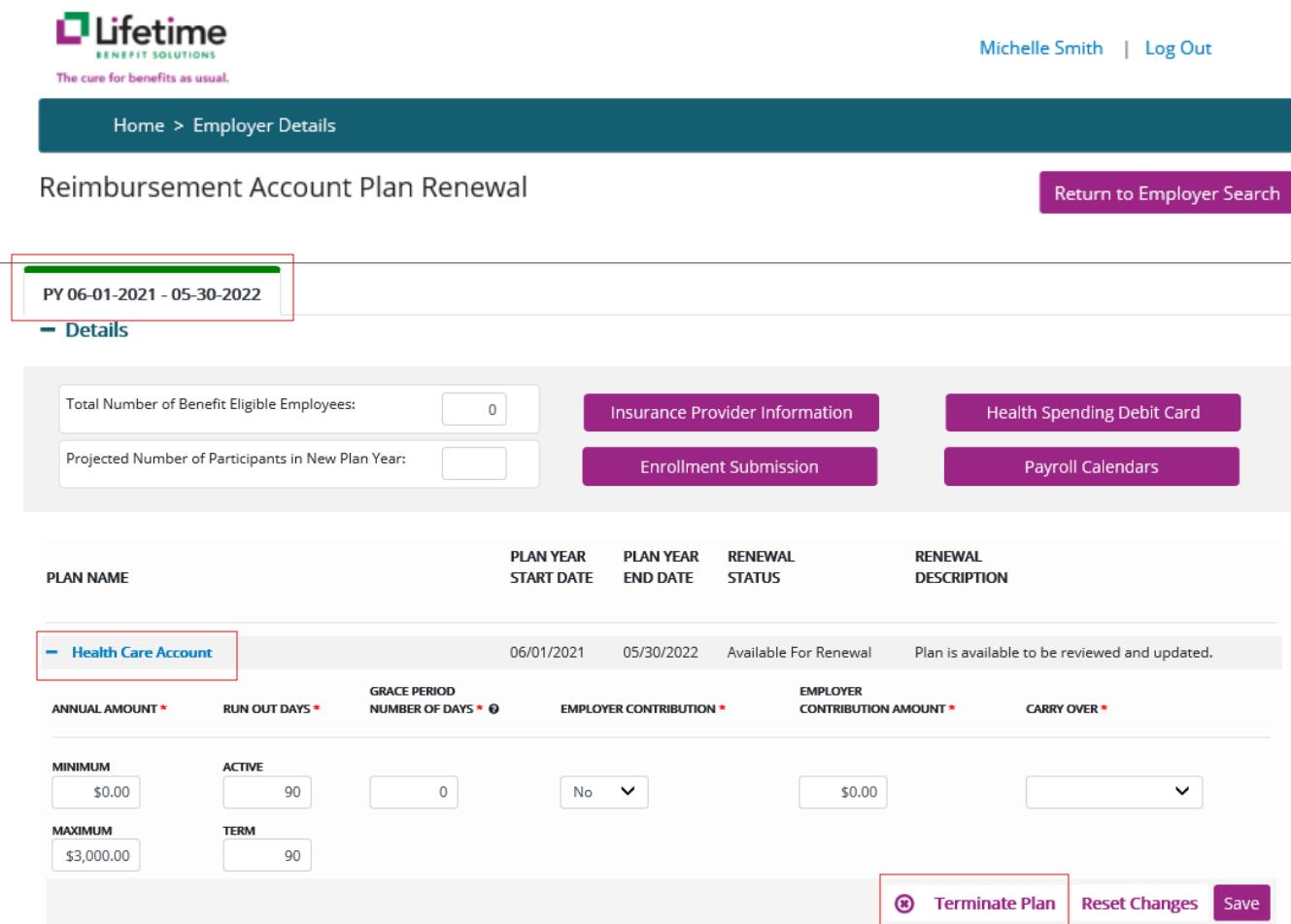
#### Broker Contact

**Sample Contact**  
email: sample.contact@lifetimebenefitsolutions.com

If you would like to change or add any of the above information, contact your LBS Reimbursement Account Manager

**Instructions:** Users can see the employer demographics, LBS Reimbursement Contact information, and Broker Contact information. These fields are not editable. Users can contact their LBS Reimbursement Contact to make any changes to this information.

## Screen: Employer Demographics Page/Plan Renewal



Home > Employer Details

Reimbursement Account Plan Renewal Return to Employer Search

PY 06-01-2021 - 05-30-2022

— Details

Total Number of Benefit Eligible Employees:  Insurance Provider Information Health Spending Debit Card

Projected Number of Participants in New Plan Year:  Enrollment Submission Payroll Calendars

PLAN NAME	PLAN YEAR START DATE	PLAN YEAR END DATE	RENEWAL STATUS	RENEWAL DESCRIPTION
— Health Care Account	06/01/2021	05/30/2022	Available For Renewal	Plan is available to be reviewed and updated.

ANNUAL AMOUNT \*  RUN OUT DAYS \*  GRACE PERIOD NUMBER OF DAYS \*  EMPLOYER CONTRIBUTION \*  EMPLOYER CONTRIBUTION AMOUNT \*  CARRY OVER \*

MINIMUM  ACTIVE  GRACE PERIOD NUMBER OF DAYS \*  EMPLOYER CONTRIBUTION \*  EMPLOYER CONTRIBUTION AMOUNT \*  CARRY OVER \*

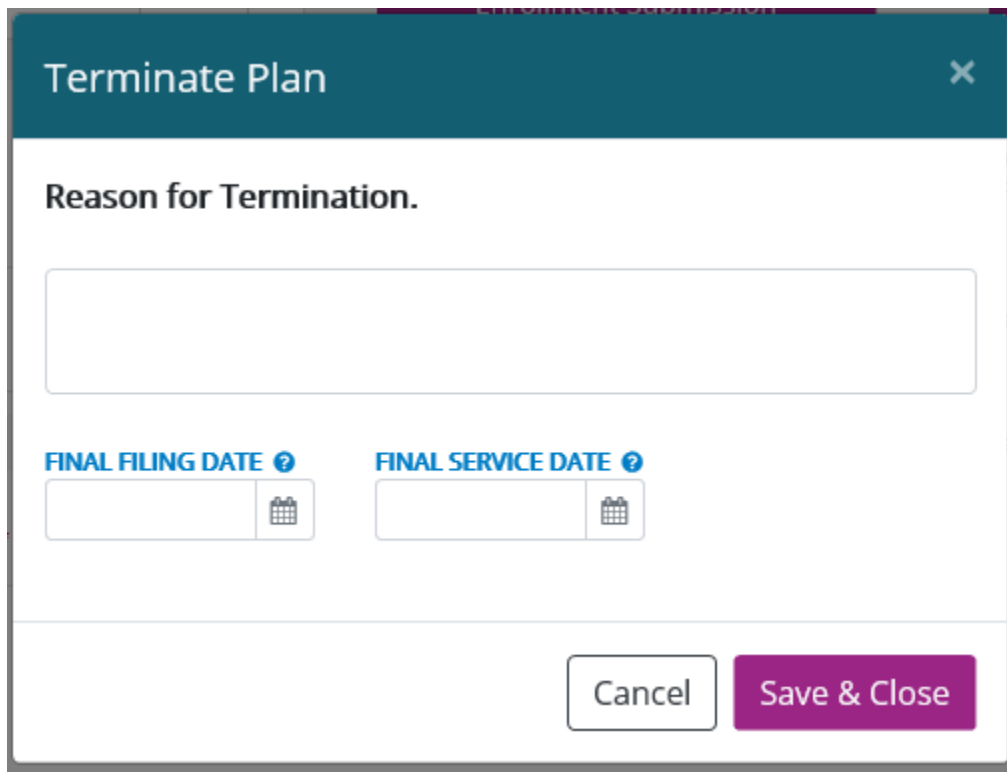
MAXIMUM  TERM

Terminate Plan Reset Changes Save

**Instructions:** The top portion of the tab must be completed before plan submission. Users will have the ability to upload their Payroll Calendars, give Insurance Provider Information, notify LBS of their intended Enrollment Submission method, and provide their Health Spending Debit Card information if applicable. Users will also be asked to provide their Benefit Eligible and Participant counts.


Plans are grouped in tabs by the Plan Year Name set up in the Employer Portal. Expand each plan by clicking on the plan name to renew or terminate the plan. Users can update and add information to the plan. Required fields are marked with an asterisk. Plans are available for renewal if they are within 120 days of the current date. Renewal status for each plan will change to Pending Submission when all required fields have been filled in for the plan. If the plan has a status of In Progress, there is additional information needed before the plan is ready for submission.


## Screen: Plan Termination



Terminate Plan

Reason for Termination.

FINAL FILING DATE 

FINAL SERVICE DATE 

Cancel Save & Close

**Instructions:** Once a user clicks on Terminate Plan from the Plan Renewal screen, the Plan Termination window will open. Users will need to enter the Reason for Termination, Final Filing Date and Final Service Date. Users will also have the option to Restore the Plan if it was terminated in error.

## Screen: Plan Submission



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Home > Employer Details

### Reimbursement Account Plan Renewal

[Return to Employer Search](#)

#### Employer Details

Employer Name: Demo Employer1  
 EIN: 17-1234567  
 Address: Lifetime Benefit Solutions  
 333 Butternut  
 Syracuse, NY, 13214

Debit Card:  No  Yes  
 Claims Exchange/ACT:  No  Yes

If you would like to change or add any of the above information, contact your LBS Reimbursement Account Manager

#### LBS Reimbursement Contact

Sample Contact  
 email: sample.contact@lifetimebenefitsolutions.com

#### Broker Contact

Sample Contact  
 email: sample.contact@lifetimebenefitsolutions.com

PY 06-01-2021 - 05-30-2022

#### Details

Total Number of Benefit Eligible Employees:

Projected Number of Participants in New Plan Year:

[Insurance Provider Information](#)

[Health Spending Debit Card](#)

[Enrollment Submission](#)

[Payroll Calendars](#)

PLAN NAME	PLAN YEAR START DATE	PLAN YEAR END DATE	RENEWAL STATUS	RENEWAL DESCRIPTION
+ <a href="#">Health Care Account</a>	06/01/2021	05/30/2022	Pending Submission	Plan has been updated and is pending submission.
+ <a href="#">DEPENDENT CARE ACCOUNT</a>	06/01/2021	05/30/2022	Pending Submission	Plan has been updated and is pending submission.
+ <a href="#">HEALTH REIMBURSEMENT ACCOUNT</a>	06/01/2021	05/30/2022	Pending Submission	Plan has been updated and is pending submission.
+ <a href="#">INDIVIDUAL PREMIUM REIMBURSEMENT ACCOUNT</a>	06/01/2021	05/30/2022	Pending Submission	Plan has been updated and is pending submission.

[Submit](#)

**Instructions:** Once all information on the Plan Year tab has been completed and all plans are in a status of Pending Submission (or Terminated), the Submit button will be enabled so that users can submit their renewal. Once the renewal has been submitted, no changes will be allowed.



## Frequently Asked Questions

**FAQ:** I have forgotten my password. How do I reset my password?

**Answer:** Go to the portal home page and click the 'Forgot Your Password' link. Enter your email address and click 'Send Temporary Password'. A temporary password will be emailed to you. You can then establish a new password.

**FAQ:** How do I get a Broker added or removed from the portal?

**Answer:** Contact your LBS Reimbursement Contact and they will make the change for you.

**FAQ:** Why do my plans say, 'Not Available for Renewal'?

**Answer:** Only plans that renew within 120 days of the current date are available for renewal.

**FAQ:** Why is my plan not showing a status of 'Pending Submission'?

**Answer:** There is required data that is not complete. You will need to go back into the plan renewal and complete any missing information.

**FAQ:** Why is the submit button not enabled?

**Answer:** In order for the submit button to be enabled, all plans must be in a status of Pending Submission. You will also need to make sure that the portion above the plan information is complete (Total Number of Benefit Eligible Employees, Project Number of Participants in New Plan Year, Insurance Provider Information, Enrollment Submission, Payroll Calendars, and Health Spending Debit Card information if applicable). Once all of this information has been completed, the submit button will become enabled.

**FAQ:** I am a broker and I do not see some of my clients in the portal.

**Answer:** Generally, there are two reasons you may not see a client in the portal.

1. The client is not linked to your access. If you feel this is the situation, please contact your LBS Reimbursement Contact to update the access.
2. The client only has certain types of plans that are not being maintained in the portal.

**FAQ:** What do I do if I notice incorrect information in the Employer Details section?

**Answer:** Contact your LBS Reimbursement Contact and they will update the information for you.