

Lifetime

Benefit Solutions

REIMBURSEMENT ACCOUNT PLAN RENEWAL PORTAL USER GUIDE

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Screen: Login Page



Login

Sign in

[➔ Sign in](#)

[Forgot your password?](#)

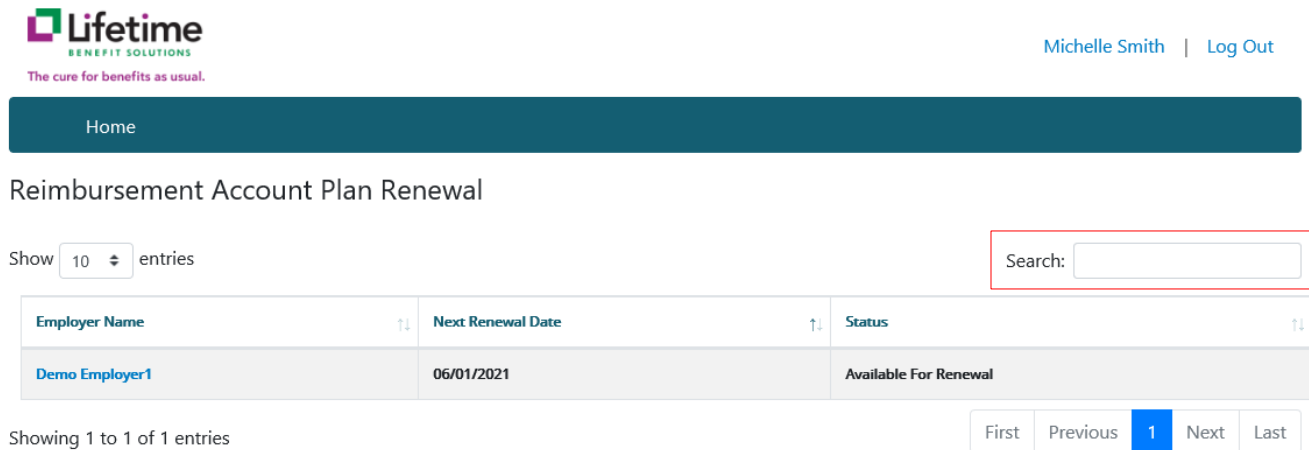
[👤 New User](#)

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



The screenshot shows the Employer Landing Page. At the top left is the Lifetime Benefit Solutions logo with the tagline 'The cure for benefits as usual.' At the top right, the user name 'Michelle Smith' and a 'Log Out' link are displayed. Below the header is a dark teal navigation bar with a 'Home' link. The main heading is 'Reimbursement Account Plan Renewal'. Below this, there is a 'Show 10 entries' dropdown and a search bar labeled 'Search:'. A table with three columns: 'Employer Name', 'Next Renewal Date', and 'Status'. The first row shows 'Demo Employer1', '06/01/2021', and 'Available For Renewal'. At the bottom left, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are navigation buttons: 'First', 'Previous', '1' (highlighted), 'Next', and 'Last'.

Home

Reimbursement Account Plan Renewal

Show 10 entries

Search:

Employer Name	Next Renewal Date	Status
Demo Employer1	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


Michelle Smith | [Log Out](#)

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:

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
<div>Health Care Account</div>	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 <input type="text" value="\$0.00"/>	ACTIVE <input type="text" value="90"/>	<input type="text" value="0"/>	<input type="text" value="No"/>	<input type="text" value="\$0.00"/>	<input type="text"/>
MAXIMUM <input type="text" value="\$3,000.00"/>	TERM <input type="text" value="90"/>				

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

The screenshot shows a modal window titled "Terminate Plan" with a close button (X) in the top right corner. Below the title bar, the text "Reason for Termination." is followed by a large text input field. Below this field are two date selection fields: "FINAL FILING DATE" and "FINAL SERVICE DATE". Each date field has a small calendar icon to its right. At the bottom right of the window are two buttons: "Cancel" and "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


 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 ☐ No ☒ Yes
Claims Exchange/ACT ☒ No ☐ 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

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

Details

Total Number of Benefit Eligible Employees: 120

Projected Number of Participants in New Plan Year: 98

[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
+ Health Care Account	06/01/2021	05/30/2022	Pending Submission	Plan has been updated and is pending submission.
+ DEPENDENT CARE ACCOUNT	06/01/2021	05/30/2022	Pending Submission	Plan has been updated and is pending submission.
+ HEALTH REIMBURSEMENT ACCOUNT	06/01/2021	05/30/2022	Pending Submission	Plan has been updated and is pending submission.
+ INDIVIDUAL PREMIUM REIMBURSEMENT ACCOUNT	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.