

Welcome to CBIZ Flex!

Your Flex account will be moving to the CBIZ platform as of 1/1/2021. The following will help make it a smooth transition. Please let us know if you have any questions.

Debit Cards (for participating employers)

If offered by your plan, each participant will receive two cards. They will be effective as of the first day of the new plan year. The Pension Dynamics debit card will no longer work as of the new plan year even if you have a balance. You can submit claims to spend down the balance through the claims run out period.



Consumer Portal (if you did not use CBIZ online enrollment)

Select "Create your new username and password" to set up access to your account online at <https://myplans.cbiz.com>. This will not be available until after your enrollment is received and processed by CBIZ. You will not need to complete this step if you have already enrolled using CBIZ online enrollment.

Once you are logged in, complete your set-up by hovering over your name at the top of the screen to update:

Reimbursement Preferences

You will need to set up your Direct Deposit and banking information in the *Banking/Cards* section.

Dependents

Review your profile under *Profile Summary* to ensure everything is correct and add any dependents to your account.

Alert Notifications

In the Message Center click on *Update Notification Preferences* to set up your automated alerts on your account.

Mobile App

The new **CBIZ Mobile Application called "My Plans"** provides tech savvy participants with on-the-go access to account balances right from your iPhone®, iPod Touch®, iPad®, or Android®-powered device. Search for "CBIZ" on the appropriate app store to download this free app. Once you have successfully registered your username and password on <https://myplans.cbiz.com> you may use this login for the My Plans Mobile App.

Contact Us

Pension Dynamics was acquired by CBIZ earlier this year, however the same team is here to assist you with your account. You can continue to contact us directly by phone at (925)956-0514 or email at PHCBenefits@cbiz.com for assistance with your old or new account.

The CBIZ Service Center is also available to assist (with new plan questions only) at (800)815-3023, option 4 or by email at cbizflex@cbiz.com.