

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*	<input type="text"/>
Last Name*	<input type="text"/>
Zip Code*	<input type="text" value="Please enter your 5 digit zip code"/>
SSN or Employee ID*	<input type="text" value="SSN"/> - <input type="text"/> - <input type="text"/> -- OR --
	<input type="text" value="Employee ID"/>



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. *Required

Select a question...	*	<input type="text"/>
Select a question...	*	<input type="text"/>
Select a question...	*	<input type="text"/>

[Next](#)

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)

*Required

Username*	<input type="text"/>
	Your username may contain alphanumeric characters and any of the following special characters: period (.), at sign (@), underscore (_), and dash (-).
Password*	<input type="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*	<input type="password"/>

[Submit](#)

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

