Q1: How do I get to the portal?
A1: Go to ConcordiaPlans.org and on the homepage you’ll see a circle with a dotted line leading you right to the login button. If you’ve already designated a Benefits Administrator for your ministry, click on the button and see Question 3 about how to register. If you haven’t designated your benefits administrators, go to Question 2 to find out how to make a designation.

Q2: I haven’t designated any Benefits Administrators for my ministry. How do I do this?
A2: Follow these steps to designate your Benefits Administrators.

2. Enter your temporary password and CPS Employer ID (The temporary password is located on the “Save The Date” invitation that you received in April, as well as on emails that were sent to you in April and May. Your Employer ID can be found on your CPS invoice.)
3. If entered correctly, you will be prompted to enter your direct office email address and submit.
4. You will automatically receive an email in which you will be asked to confirm your email address and then be allowed to re-enter the system.
5. You will be prompted to enter your temporary password and create a new password. Your new password and confirmed email address will now be your login credentials for this tool.
6. As the person designating your ministry’s Benefits Administrators, you will automatically be designated as the Plan Administrator. You will be asked if you are a member of the Concordia Plans. If you answer “Yes,” you will be prompted to choose your name from the list of workers and click “Select.” You will then be required to enter a valid email address. Click “Designate Admin” once you’ve entered this information.
If you answer “No,” you will be required to enter the following identifying information:

- First and last name
- Date of birth
- **Social Security number**
- Position status (full-time worker, part-time worker or volunteer)
- Volunteer term date (if applicable)

Click “Designate Admin” once you’ve entered this information.

7. You will now be able to designate any other administrators to whom you want to assign access.

8. When finished, click “Complete” and then click “Log Off” to exit out of the system.

If you need help, call the CPS Customer Care Team at 888-927-7526.

**Q3:** I’ve designated my ministry’s Benefits Administrator, so what’s the next step?

**A3:** Now you’re ready to register. Click on the login button on **ConcordiaPlans.org.** Go to “Register” on the right of the page. Follow these five steps.
1. **Enter your email address.** This is where you enter the email address you want associated with your profile. While you may have received the invitation to register at your work email address, you have the option of setting up your account using the email address of your choice. If you are an employer administrator, you likely will want to continue using your work email address.

2. **Create your password.** You will need to create a password using a minimum of eight characters that includes an upper case and lower case letter, as well as a numeric character. For convenience, you can check the box to show your password so you can see what you are typing. As an employer administrator, you will be prompted to update this password every six months for security purposes.

3. **Choose and answer a security question.** There is a large list of questions from which you can choose. Once you have found one you like and for which you will remember your answer, type in your answer.
4. **Verify your account.** This step is very important because it will allow you access to your employees’ benefits information, as well as your own. Enter your:

- Last name
- The last four digits of your **Social Security number**
- Date of birth

Providing this information ensures that you are uniquely matched up with a valid administrator record so that your account is secure and your information is accurate. This information enables the portal to be personalized for you and your ministry. Click the submit button and you should see a “Success!” message if your account is ready to go.

5. **Sign in.** Click on the “Sign in to my Dashboard” button and, from the sign-in section on the left, use the email address and password you set up when you registered your account. To make future sign-ins easier, you can click the box for “Remember me,” which will save your email address for next time and require you to type in only your password.

Once you have completed this final step, you will be directed to your ministry’s dashboard.
Q4: I understand this is a portal for employers and members. I’m both, so is there an easy way to access both accounts?

A4: Yes. Move your cursor to the top right of the screen where you see your name. Click on the down arrow. From here you can toggle between your account as an employer and your account as a member. There is no signing out of one to get back into the other.
Q5: What can I do on the employer dashboard?

A5: The dashboard is your toolbar and your home base. The toolbar is the row of tabs that take you to some of the most requested content on the portal - Quick Links, Workers, Benefits, Billing, Actions, Resources and Admin Profile. If you need additional help, click the “Help” button, located to the right of the toolbar. From the dashboard, you can:

- Pay your bill electronically through the Concordia Plans Online Payment System by simply clicking the “Pay Online” button, which you will find under both the “Admin Profile” and the “Resources” tabs.
- Access your ministry’s account manager by emailing or calling him or her
- Monitor how many workers have enrolled in each plan your ministry offers, a simple way to get data to help administer your workers’ benefits
- See which benefits your ministry is currently enrolled
- Receive alerts as to what actions your ministry needs to take or important information you need to read, along with deadlines for completing those actions
- Tap into resources that will help you administer benefits and stay up-to-date on the important information that applies to your ministry and your workers.
Q6: Where can I see who has been named to specific administrative roles for my ministry?

A6: On the right side of the “Admin Profile” screen, you can see specific administrative roles within your employer portal. These roles include Plan Administrator, Finance Administrator, HR Administrator or HR Read-Only Administrator.

Q7: What do I do if I want to reassign an administrative role?

A7: If you need to update your employer information, all you need to do is contact CPS at 888-927-7526.

Q8: What worker information will I be able to access?

A8: Under the “Workers” tab, you will find a list of your workers and the benefit plans they are enrolled in. Type a worker’s name in the search bar to find a specific worker. Directly below the search feature is a list of boxes you can check to filter your workers by specific benefit plans. For example, you can see all workers participating in the Concordia Retirement Savings Plan.
Q9: How will I know when I have actions to take?
A9: When you sign in, look for an orange circle at the top right of the “Actions” tab. If you see that circle and a number inside the circle you have that number of alerts requiring action, along with completion deadlines. You can also conveniently add these actions to your personal calendar so that you are reminded.

Q10: Why do you need Social Security numbers for the benefits administrator and others handling administration on the portal?
A10: We require Social Security numbers of the individuals you have identified because an administrator on the portal, even one with read-only privileges, will be able to view sensitive data about the workers at your ministry. In order to protect your workers’ privacy, we must validate each user in this way.

One way of protecting your information is making sure that you have identified the person or people allowed to select plans, administer benefits and view/pay invoices from CPS. We need these details to help us be good stewards of the information you entrust to us.
Q11: What is CPS doing to protect personal information on the portal?
A11: We take security very seriously at Concordia Plans. All efforts are made to protect the large amount of employer and member data we house. With that said, we have a multi-layer environment of how data is stored and protected at-rest with encryption, who has access, connections to servers, transfer of data (Transport Layer Security and Enterprise-Strength Firewalls) along with extensive security monitoring.

The employer administration part of the portal resides in a secure hosted facility behind industry leading firewalls. When you access the website it is secured through Secure Sockets Layer. This is the standard security technology for establishing an encrypted link between a web server and a browser. This link ensures that all data passed between the web server and browsers remain private.

Additionally, we utilize Microsoft Active Directory internally to assign roles and permissions to critical servers, folders and files. This is monitored and audited on a frequent basis. We partner with a security vendor that monitors our systems for any inbound or outbound malicious or suspicious activity. There are also technologies implemented at the perimeter of our network to detect and alert our internal and external security teams in the event of issue.

Finally, we’ve implemented solutions to monitor and alert key IT personal when Protected Health Information, personally identifiable information, Social Security numbers or credit card numbers are being sent unsecure. The solution will block those messages and provide a report back to key technology personnel.

If you have questions, please contact our Customer Care Team at 888-927-7526, and we will be happy to help.