

Welcome to the PlanYear Mobile App for Employee Benefits!

Access your ID cards and plan details - anywhere, anytime. A health insurance advocate is only one click away for benefits questions and claims assistance.

Getting Started

Download the PlanYear App:  

Registration

You have a few options to register and you can take these steps from your **mobile phone** or the **Digital Benefits Guide** link provided to you by your employer:

- + **Wait to receive an email from PlanYear when your employer has added your details**
 - Open the app to register your account and click Get Started. If you have not yet registered and you do not have log-in credentials, click Register.
 - Enter your work email address or the email you used to enroll in your company's health plan. Click Next.
 - If your company uses SSO, you will be prompted to enter your SSO credentials on the following screen.
 - Check your email inbox for a registration invite from PlanYear. If you don't see it, please check your spam folder. Click Register to be taken back to the mobile app or DBG (i.e. where you initiated the registration process).
 - If the link is not working, you may also copy and paste the code in the email into the registration flow directly to continue.
 - Follow the steps to create a password and select the plans you have already enrolled in.
 - You can now log in and access your information. You can use the same log in information in the mobile app or DBG moving forward!

+ Register on your own

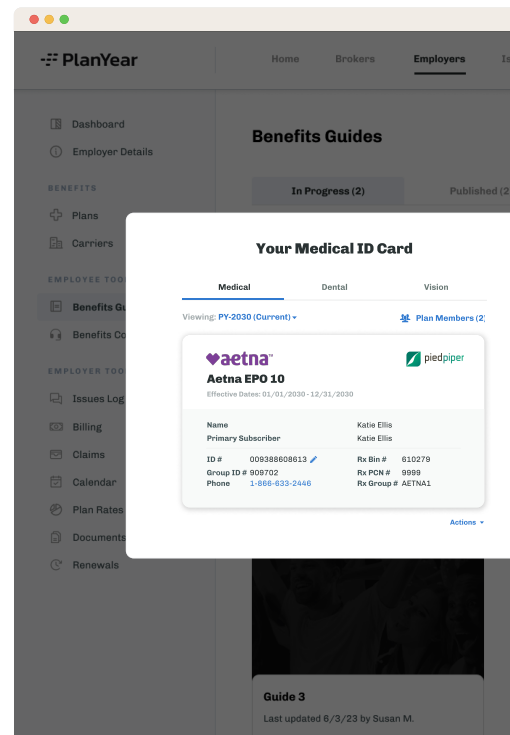
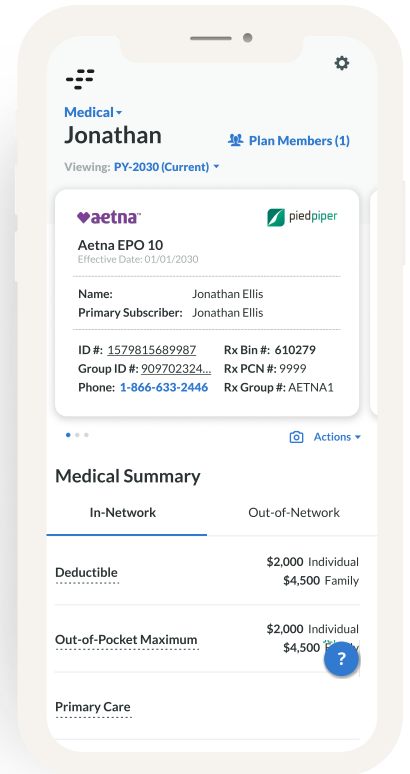
- Please note that if you register before your employer has added your details or made the IDs available to you, you will have access to the app but may not see a Member ID yet.
- Follow the same steps as above.

Accessing Your Benefits:

Upon registration, you can conveniently access benefits information and ID cards.

+ Key Features

- Access digital ID cards.
- Print, save and share ID cards.
- Compare current vs. upcoming plan years.
- Invite and manage dependents.
- Get support directly through the app.



Managing Your Account

+ Reset Password

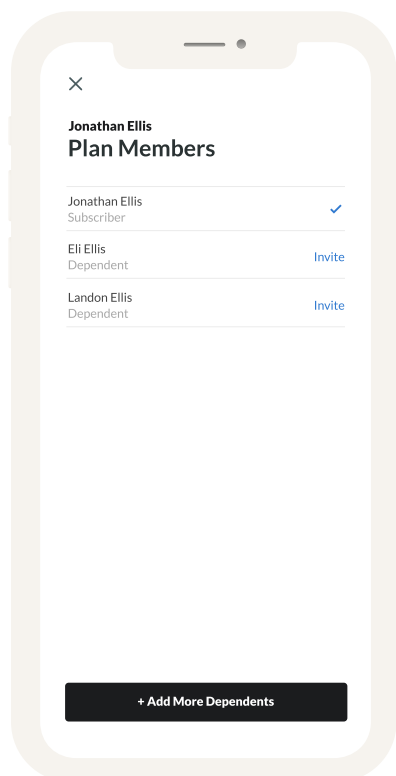
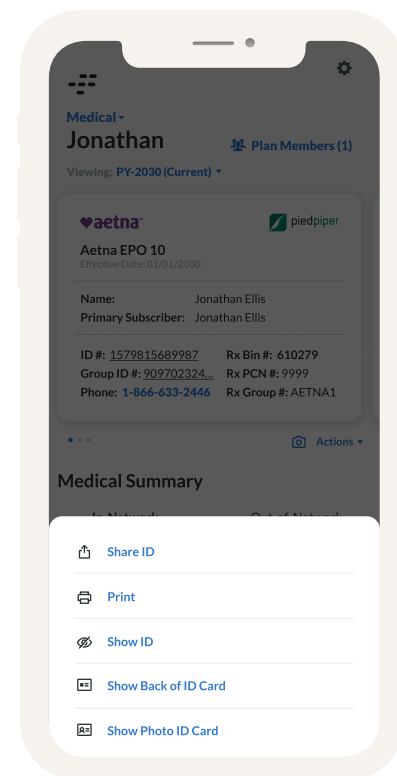
- If the PlanYear mobile app does not recognize your password or you need to reset it, please take the following steps:
 - Click Trouble Logging In? on the login screen. Follow the prompts within the app.
 - Enter the email you used to register. Click Next.
 - Check your email for a link to reset your password. This link will expire after 1 hour, so repeat the steps to generate a new link.
 - Enter your new password to complete the process.

+ Sign-in via SSO

- Use your company SSO login credentials.

+ Switch Plan Years

- Change views under “Viewing” menu above your digital card on the main screen.



+ Invite Dependents

- You can invite dependents so they can set up their account and access details.
 - Within the app, click Plan Members on the main screen.
 - If your dependents have already been added by your employer, you will see them listed.
 - Click on the blue Invite link next to their name to send them a registration email automatically.
 - If you don't see your dependent listed, click the button at the bottom to add more dependents.
 - Enter their first name, last name, and email.
 - Your dependent will receive an email from PlanYear. Please ask them to follow the steps for registration.

Support

- Get Help via In-App Support
- Need assistance? Access the assistant via chat or contact Lumity Support at support@lumity.com or **844-258-6489** during standard business hours:
- Monday - Friday 6AM - 5PM PT | 9AM - 8PM ET

Thank you for choosing PlanYear! Let us know if you have any other questions.