



# Concepts in Benefits, Inc.

## Contact List

### General Sales

- RFP's (Request For Proposal)
- Service Agreements
- S125 and/or S105 Plan Documents
- Plan Designs

**Karen Cook:**

[kcook@conceptsinebenefits.com](mailto:kcook@conceptsinebenefits.com)

866-672-2400 x275

### Primary Client Contact

- Employer Web Portal Access and Usage
- Employee Educational Meetings
- Benefit Fairs
- Service Issues/Concerns
- Participant Resource & Education Packet (PREP)

**Pat Kutschke:**

[pkutschke@conceptsinebenefits.com](mailto:pkutschke@conceptsinebenefits.com)

866-672-2400 x270

### Enrollments

- Census (spreadsheet with participant/dependent info)
- Online Enrollment
- New Hires/Terminations
- Election Changes
- Addition of Dependents\*

**Chris Soucy:**

[enrollments@conceptsinebenefits.com](mailto:enrollments@conceptsinebenefits.com)

866-672-2400 x277

### Billing

- Plan Setup and Renewal Fees
- Participation Administration Fees
- Document Preparation Fees

**Linda Chamberland:**

[cbibilling@conceptsinebenefits.com](mailto:cbibilling@conceptsinebenefits.com)

866-672-2400 x224

### Member Services

- Participant Account Balances\*
- Claims Status\*
- Substantiation Requests
- Eligible Expenses
- Web Account Creation and Access
- Failed Flex Card Transaction
- CBI Flex Card Orders\*
- Direct Deposit Setup\*
- Demographic Changes\*
- FSA Claims/Reimbursement
- HRA Claims/Reimbursement
- Parking/Mass Transit Claims/Reimbursement

800-224-7688

**Member Services Team:**

[cbi@conceptsinebenefits.com](mailto:cbi@conceptsinebenefits.com)

**Claims Related:**

[claims@conceptsinebenefits.com](mailto:claims@conceptsinebenefits.com)

### Funding

- FSA/HRA/HSA Plan Funding
- Plan-Year End Client Funding Reconciliation

**Diane Josef:**

[funding@conceptsinebenefits.com](mailto:funding@conceptsinebenefits.com)

866-672-2400 x255

### \*Self-Service/Web Portal

**Participants:** [www.cbiflexcard.com](http://www.cbiflexcard.com)

- Account Balance
- Transaction History
- Claims/Reimbursement
- Demographic Changes
- Additions of Dependents
- Direct Deposit Setup and Changes

**Administrators:** [www.mycbiadmin.com](http://www.mycbiadmin.com)

- Report Generation
- Organization Demographic Updates
- View Participant Accounts