

GETTING STARTED

New BenePortal Checklist

Requesting a new BenePortal site for a client? We've got you covered! Our team **cannot get started** on a new BenePortal build without the following information:



High-resolution client logo (at least 300 DPI; JPG, PNG or EPS format) and brand guidelines, if any



All content (plan summaries, carrier flyers, documents, etc.). Prepare your files for submission as follows:

- Files must be clearly labeled as they should appear on the portal (i.e. "**Cigna 2023 PPO Plan Summary.pdf**", or "**Delta Dental Oral Health Flyer.pdf**")
- All files should be placed together in a zip folder, organized by line of coverage. For example, in your zip folder you may have secondary folders for **Medical, Dental, Wellness, Documents...** with corresponding files for each subject housed within. Please do not upload files individually to Lytho – your request will be denied.



A Word doc with any specific instructions for the portal. For example, a client might want a page dedicated to their company's wellness program. Within the Word doc you can provide any lead-in/descriptive language as it should appear on the page, specific instructions for how content should be laid out, etc.



Carrier contacts for all lines of coverage to appear on the portal

- On the Creative Solutions site, under **Request Forms & Templates**, you will find a **Carrier Contact Form**. Please complete this form and attach to your Lytho request.

FOR MORE INFO...

More information about BenePortal (including a link to a demo site, a list of what can and can't be edited, FAQs), can be found on the Creative Solutions site. Simply visit www.csbcreative.com (Password: **CSBCreative11**) and select **BenePortal Websites** from the menu.

THINGS TO KEEP IN MIND

- Our standard turnaround time to build a brand-new BenePortal is 30 business days. Please reach out to the Creative Solutions team if you have questions about timing.
- If any of the above information is missing from your Lytho request, the request will be denied and you will be asked to resubmit once all the information has been gathered.
- If the client has specific requests for images on the portal or would like to use their own images, please provide/let us know in your Lytho submission.
- If a client has multiple locations or divisions (i.e. hourly/salary employees) with different benefits, contact our team at CreativeSolutions@connerstrong.com to discuss portal setup and specific instructions for your submission.
- BenePortal is designed to house employee benefits-related content **ONLY** – it is not intended to be a repository for HR information or a replacement for a client's intranet site.

