PlanSource Online Enrollment Instructions
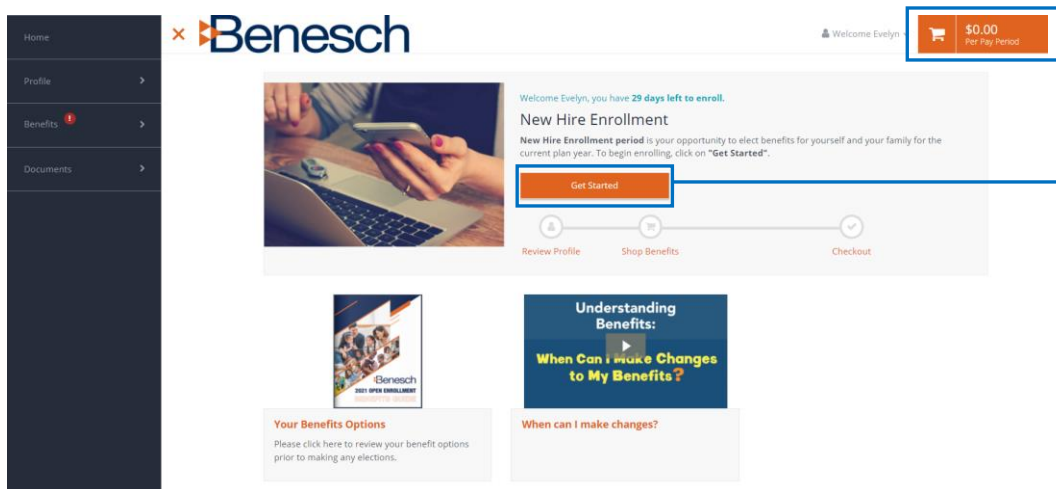
Employee Enrollment Instructions

To access your online enrollment website, go to https://benefits.plansource.com

- **Username:** the first initial of your first name, up to the first six characters of your last name, and the last four of your SSN.
  Example: An employee named Jane Anderson, with the SSN xxx-xx-1234 would have the username "janders1234".
- **Default Password**: Your birthdate in YYYYMMDD format.
  Example: A birthdate of August 14, 1962 would result in the password "19620814".

Step 1: Enroll in Benefits

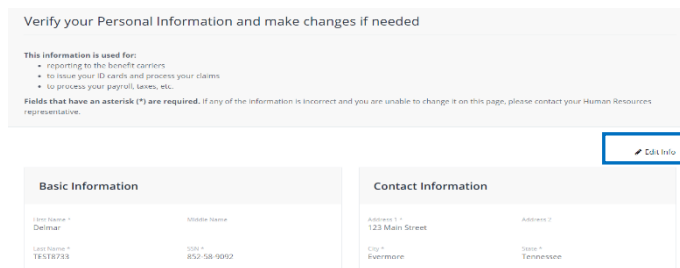To begin enrollment, click on "**Get Started**" on the main dashboard.

As you enroll in benefit your shopping cart will display the per pay period cost.

Click on "Get Started" to start your enrollment.

Step 2: Verify Your Personal Information

- Verify your personal information, to add or update available fields click "**Edit Info**" at the bottom of the page.
  - Some information may not be editable. Please make all demographic changes in ADP and it will be updated in PlanSource automatically. Examples include your address, Phone Number, and even your last name.

- Once completed click "**Next: Review My Family**" on the bottom of the page to move to the next step.

Step 3: Review Your Dependents Information

- Verify the dependents that you would like to enroll in any benefit plans are in the PlanSource system.
- To add any dependents that are missing from the system click on "Add Family Member" and enter in the dependents information.
- To edit an existing dependent on file, click "Edit" in that dependents box
- Once Completed click on "Next: Shop for Benefits"

Review the Dependent Information on file below

Dependents must be listed on this page to be enrolled in coverage.

You may:
- Add New Dependents
- Edit Existing Dependent Information
- Remove Existing Dependent

By adding a dependent, you are confirming that this a legal dependent, eligible for benefits under one or more of your available plans.

**Please Note: The "Remove" option on your dependents below, if selected, will terminate the dependent from ALL active enrolled coverage for all plan years. Coverage tiers will be adjusted where possible. If there is no tier that supports the remaining family members, the coverage will be terminated. Contact your HR team if you have any questions.

Current Family Members

Betty Tester
Child
Born 06/23/2020
View Details
Remove | Edit

➕ Add Family Member

Click on "Add Family Member" to add a dependent to the system

Click on "Edit" to update an existing family member record

‹ Back

Next: Shop for Benefits

Once completed click on "Next: Shop for Benefits"

Step 4: Enroll in Benefits

- To start your benefit election, click on the "Shop Plans" button located next to the first benefit available. This will bring you to your first plan.

Review Profile — Shop Benefits — Checkout

Below is a list of all the plans you will need to review and either change your current election or make a new election. To process please click on the "**SHOP PLANS**" button for each benefit listed below.

- All benefits must have a decision applied before you can "**Add Beneficiaries.**"
- You must "**Add Beneficiaries**" to the appropriate plans before the system will allow you to "**Review and Checkout.**"
- Your enrollment will be complete when you click "**Checkout**" at the bottom of the page.
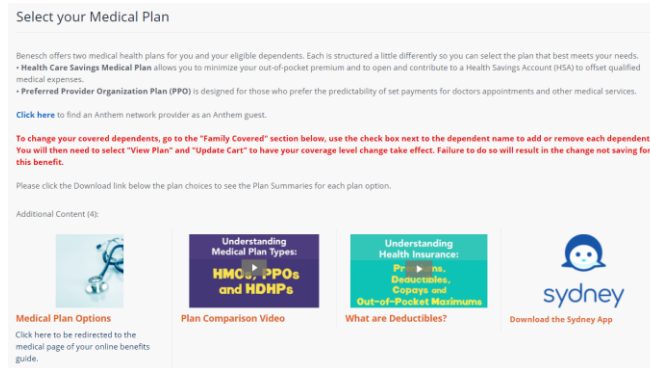
Medical

No Plan Selected | Shop Plans

Click on "Shop Plans" to begin the enrollment process

- Details and information posted about the plan will be visible at the top of the election page.

- Review the dependents that will be enrolled in the plan. The check box next to the family member name will mark them to be enrolled. Uncheck the box if they should not be enrolled in the plan.
- Select the plan you would like to enroll in click on "View Plan".
- If you would like to waive/decline the benefit click on "Decline".
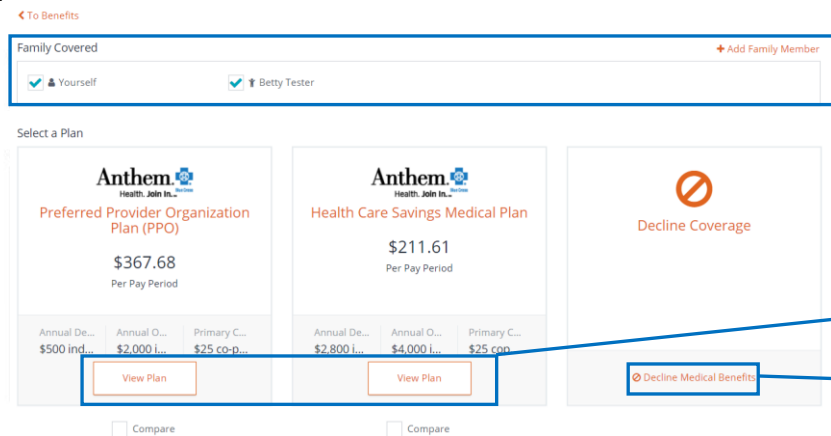
Click check box to add or remove family members you want to enroll in the benefit. If you need to add a missing family member, click "Add Family member"

Click on "View Plan" to review or enroll in the benefit plan

Click on "Decline" to decline the plan

- Review the selected plan for enrollment, confirm family who will be covered in the plan, and when ready click on "Update Cart" to enroll in the plan or "Decline" to waive coverage.
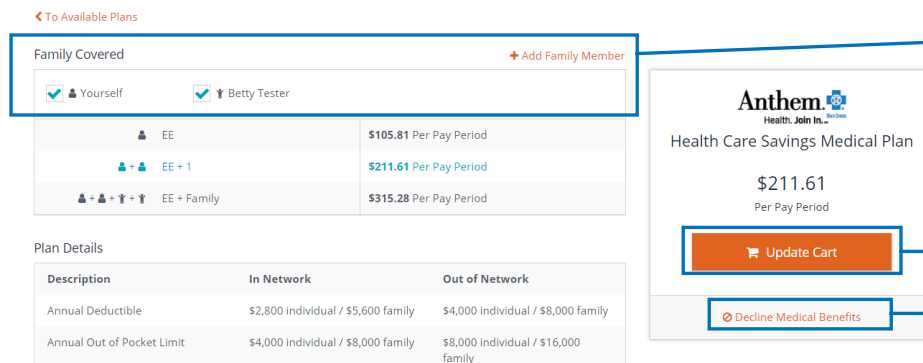
Review the Family to be covered in plan.

Click on "Update Cart" to add your election to your shopping cart

Click on "Decline" to decline the plan

Step 5: Review and Checkout

- If beneficiaries are reported to be entered for any plans "Add Beneficiaries" button will be available.

| Employer Contribution | $35.43 |
| Your Cost Per Pay Period | $173.76 |

Add Beneficiaries

- Once your enrollment is complete click "Review and Checkout" at the bottom of the benefit list.
- This will be your opportunity to review the benefit selections and costs made during the enrollment.
- If any plan selection needs to be revised click "View Plan".

| Employer Contribution | $35.43 |
| Your Cost Per Pay Period | $173.76 |

Review and Checkout

You must select or decline all coverages before moving on

Click on "Review and Checkout" to begin the final steps of the enrollment

- To finalize your elections, click on the "Checkout" button in the confirm and check out screen.
  You will not be enrolled in any plans unless you complete the checkout process. *

| Employer Contribution | $35.43 |
| Your Cost Per Pay Period | $173.76 |

Checkout

Click on "Checkout" to complete your enrollment process

- You will have the option to download, email or print your benefit confirmation statement.

Enrollment Complete!

You have completed the open enrollment process and confirmed your benefits.

Need a copy of your benefits confirmation statement?   📧 Send by Email

Review Profile   Shop Benefits   Checkout

The coverage details listed below are the current active elections on file for you and your dependents.

- If you believe there is an error in your statement, please contact your Benefits Administrator.
- If you need to make changes due to a qualifying life event, please return to the Dashboard to report a Life Event and request benefit election changes.

Click on the icons below to print your confirmation statement or generate a pdf file.

New Enrollment Plan Year Effective from 11/01/2019 to 10/31/2020   ⬇ Download   📧 Email   🖨 Print

Click on "Send by Email" to email the benefit confirmation statement to your email

Click on "Download" or "Print" to save a copy of the confirmation statement