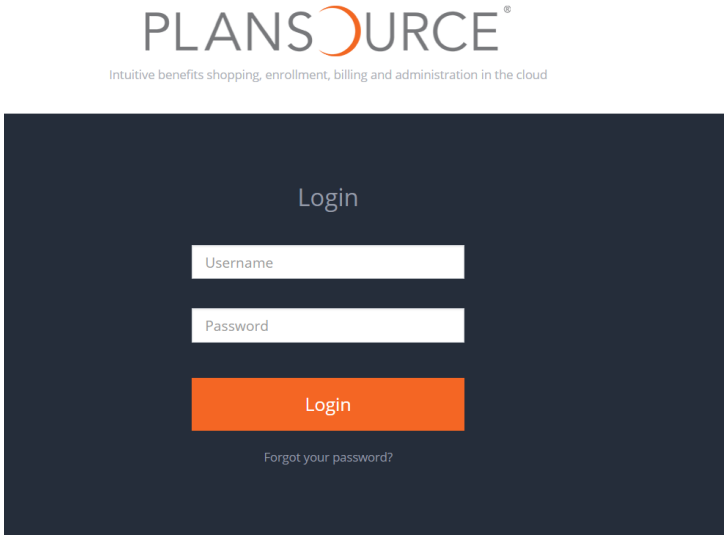
PLANSOURCE

PLANSOURCE- NEW USER INTERFACE INSTRUCTIONS

ENROLLMENT URL: https://benefits.plansource.com

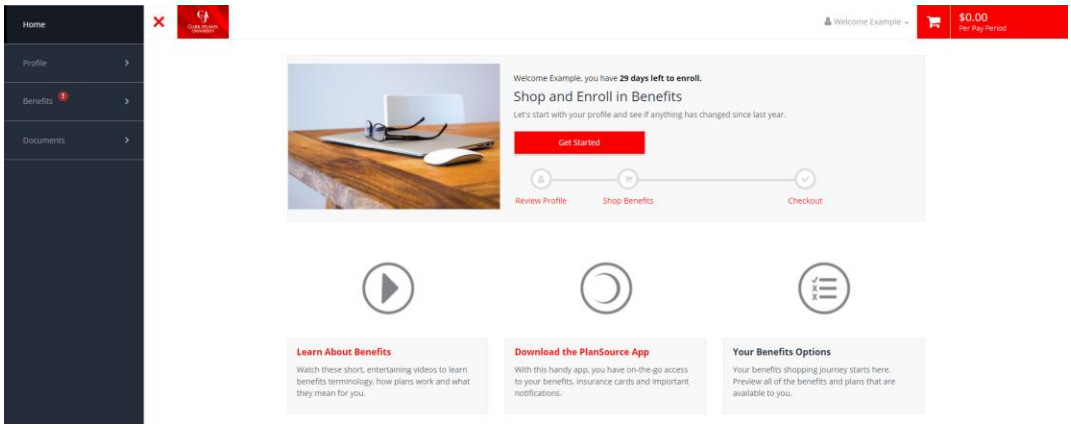
- **USERNAME**: Your user name will be a combination of your name and the last four of your SSN. (First Initial + First six letters of last name + Last four of SSN) (Example: Jon Thompson- jthomps1234)

- **PASSWORD**: Your birthdate in YYYYMMDD format. For example: If you birthdate is August 14, 1962, your password would be 19620814. At initial login, you will be prompted to change your password



Home Page

The home page is designed to help navigate you to the other major sections of the benefit administration enrollment website. Here you can access company documents, make changes to your profile and beneficiaries, and enroll in benefits.



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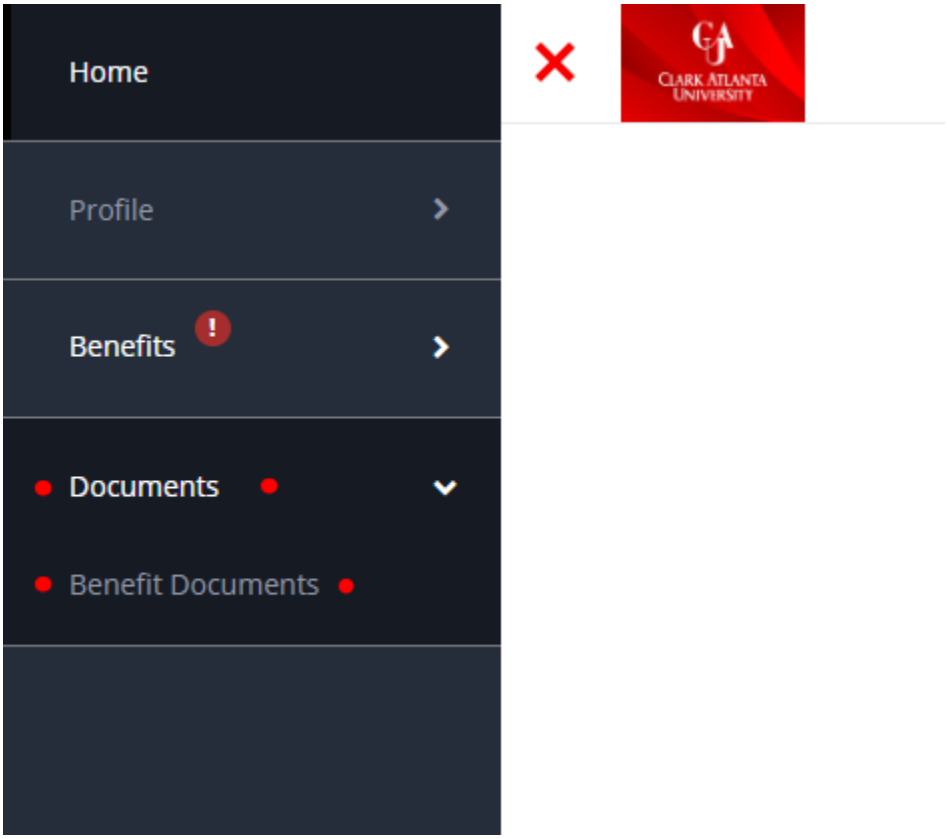
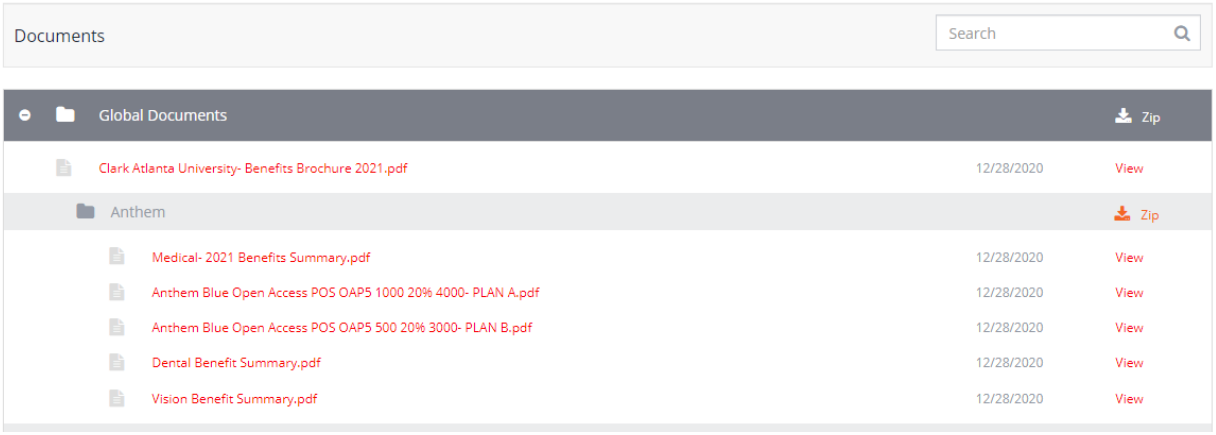
Available Documentation

Your company provided documents are located under the "**Documents**" section on the Home Page. These are available to you 24/7 and will contain items such as your benefit summaries, certificates of coverage, and other important company notices. All documents will be listed under the "Global Documents" section.





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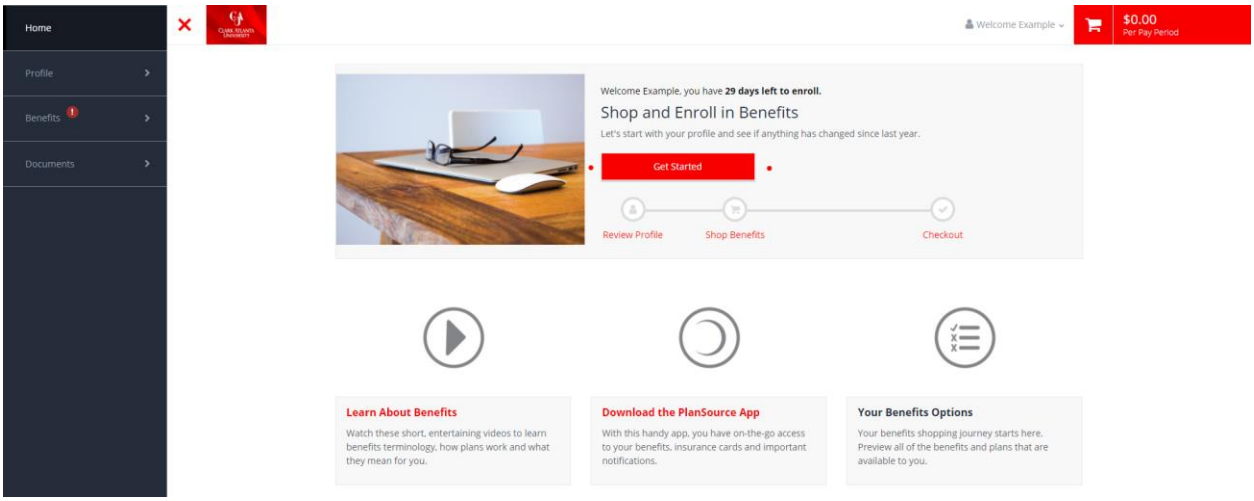
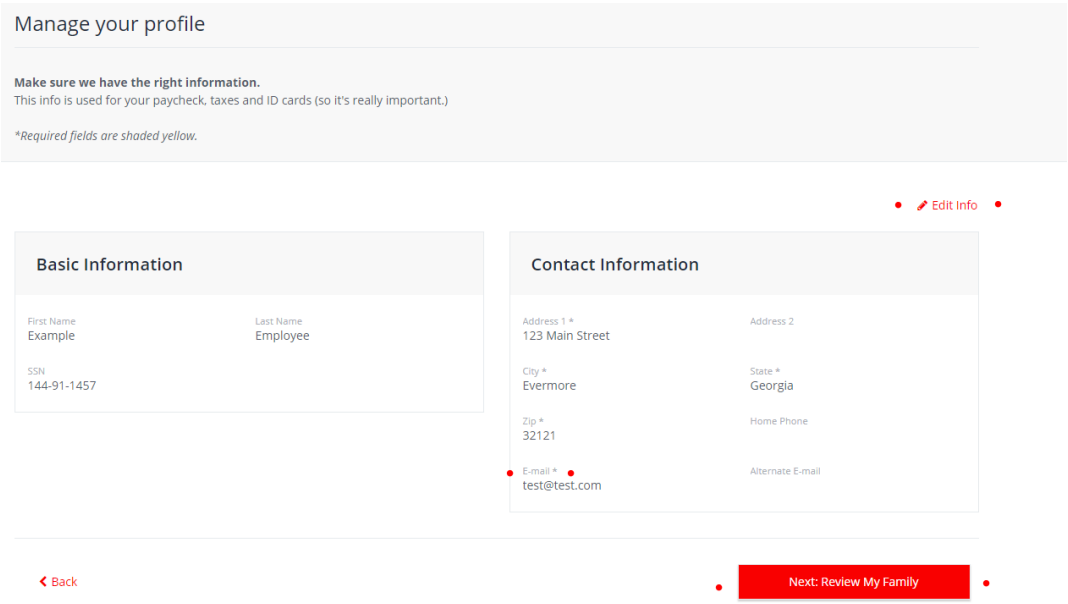
Getting Started with Your Enrollment

To start making your benefit elections please click on the "**Get Started**" button located in the center of your Benefits Home Page.



Step 1: Personal Information

The first step in the enrollment process will be to verify that your demographic information is correct (address, date of birth, etc.). Verifying that this data is important to be able to provide your applicable carriers accurate information. You will be able to "Edit" certain information via the "**Edit Info**" button, found at the bottom of the page. If you are unable to change a certain field, please contact your administrator directly.



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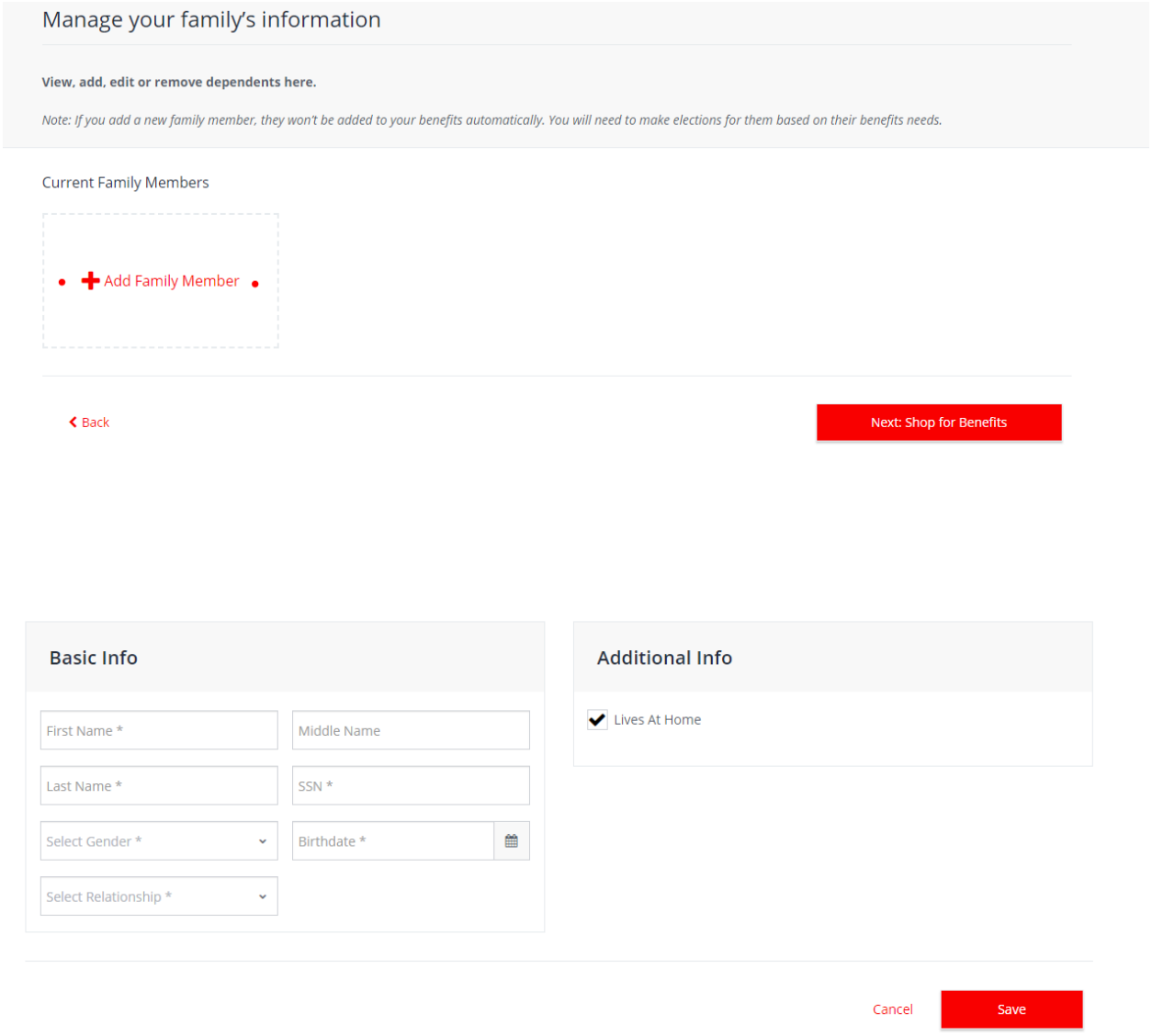
Step 2: Dependent Information

The second step of the enrollment process allows you to add any dependents that you wish to include in your covered benefits. Previously added dependents will be listed, and can be edited. You will also have the ability to "**Add Family Member**" in this section. Dependent SSN Is Required in order to add a dependent into the system. Once you have added all dependents, select the "**Next: Shop for Benefits**" button to continue.



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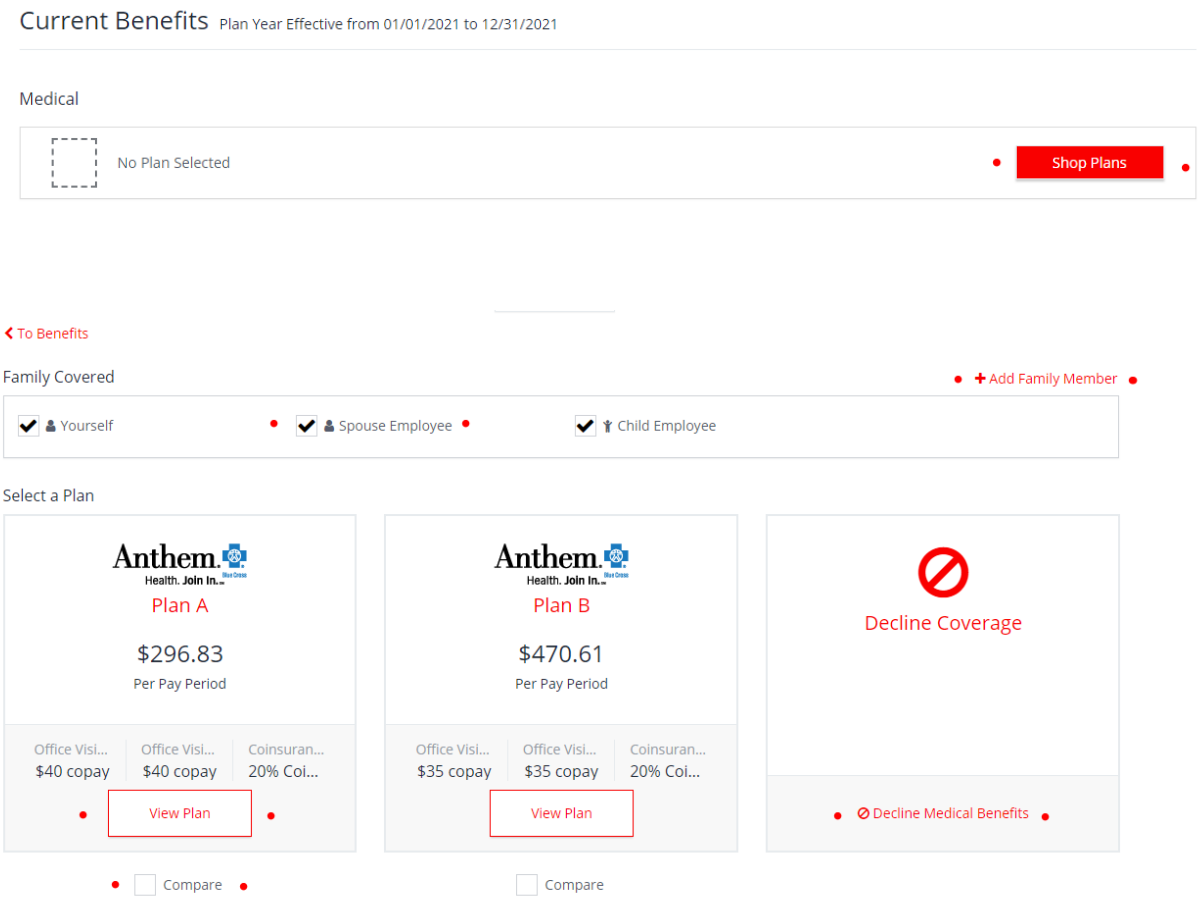
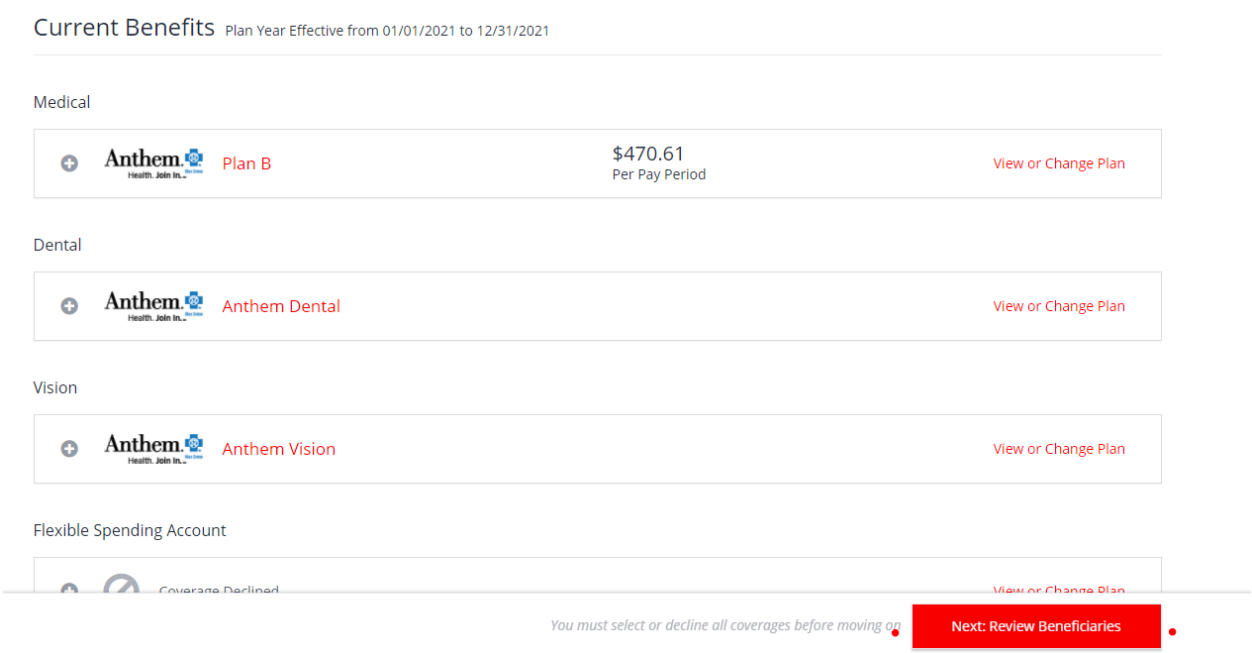
Step 3: Enroll in Benefits

To make an election or see more plan details, click on the "**Shop Plans**" button next to each eligible benefit. Here you will be able to see detailed plan offerings, employee cost per pay period, and eligible dependents. Choose the plan option of choice or select the "Decline" option. Select "**Update Cart**" to make to confirm each election and move on to the next page. Repeat until you reach the confirmation page. As you add benefits, you will notice your cart updating, along with your cost per pay period in the top right section of the each page. Screenshots below are related to electing a major medical benefit plan.



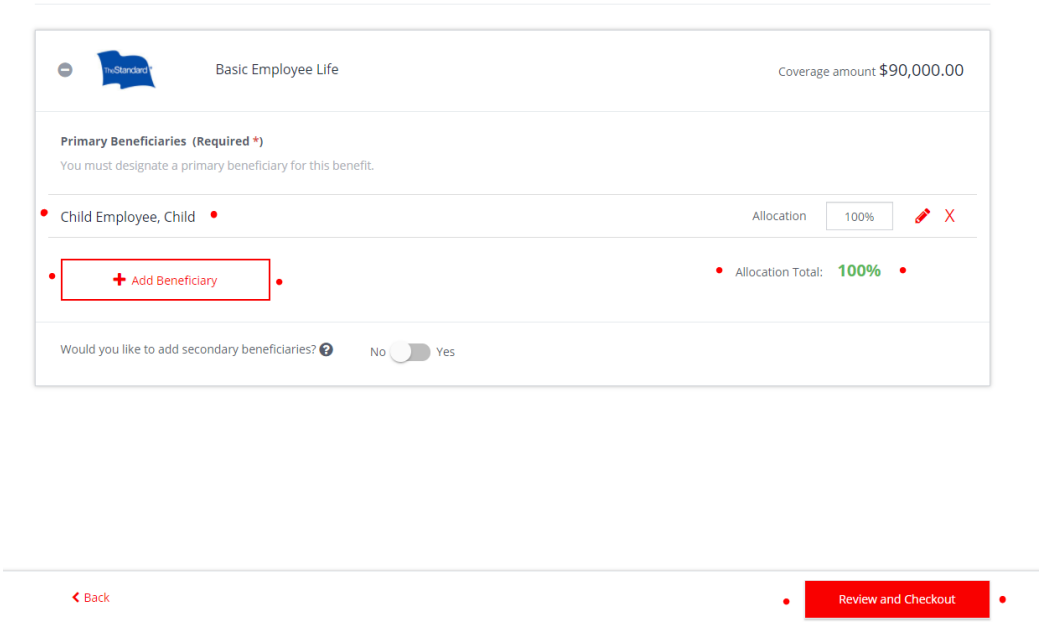
Step 4: Add Beneficiaries

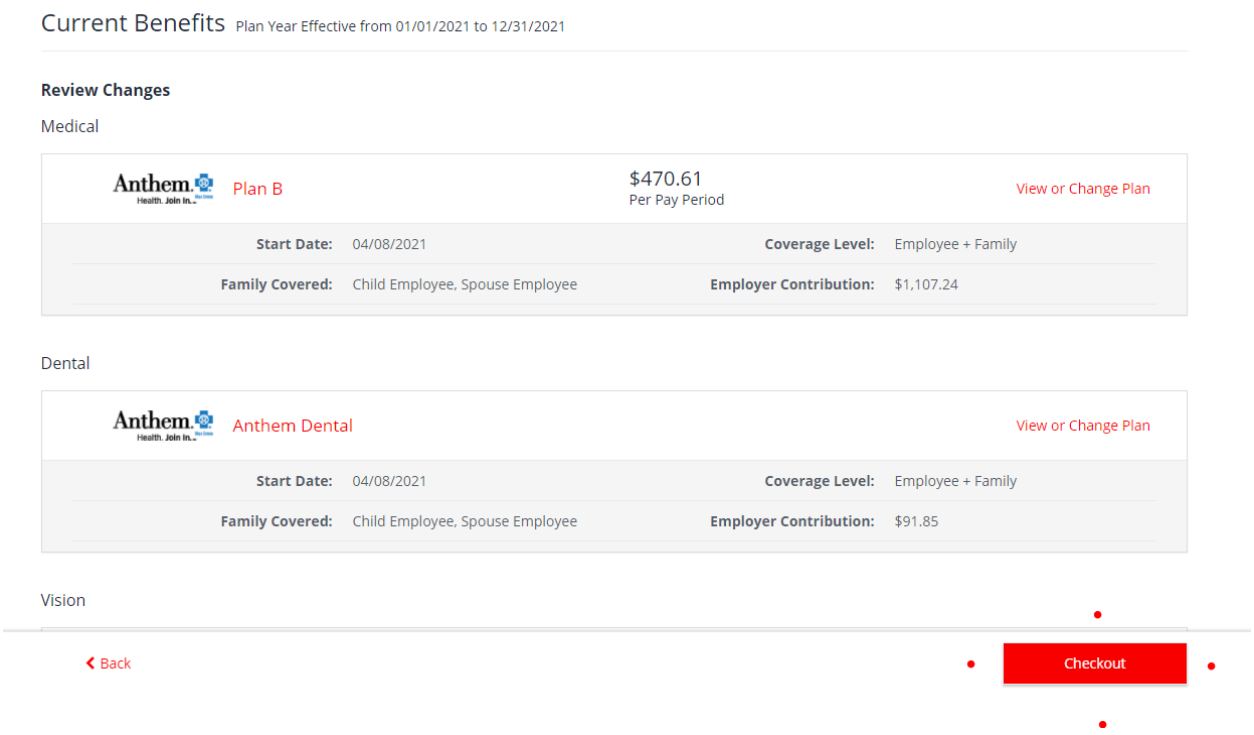
After you have completed selecting your benefits you will need to click on "**Review Beneficiaries"** at the bottom of the page. This will allow you to add your beneficiaries to your benefits that require them. You can choose from the drop down family members that have already been added, or enter new contacts.



Step 5: Confirm and Checkout

The final step allows you to review and confirm that all elected benefits are accurate. This includes plan name, coverage start date, and cost per pay period. If you need to make a change, click on the "**View or Change Plan**" button. Once you have confirmed accuracy click on the "**Review and Checkout**" button to continue. To lock in your elections, you must click the "**Confirm Elections**" button located at the bottom of the enrollment page. If you do not click this button, your benefit election updates will not be applied.





Notes

The instructions are for training purposes only. The benefits shown on these instructions may not match those available to you.

For questions about your benefits, please contact your Human Resources Team.