

Plansource Enrollment Instructions

To enroll in benefits, go to: www.plansource.com/login

To access your benefit elections and make any changes online, please use the login instructions below.

1. LOGIN

<https://benefits.plansource.com>

USERNAME: Your user name is the following: the first initial of your first name, up to the first six characters of your last name and the last four of your SSN.

- For example: If your name is Jane Anderson and the last four of your SSN is 1234, your user name would be janders1234.

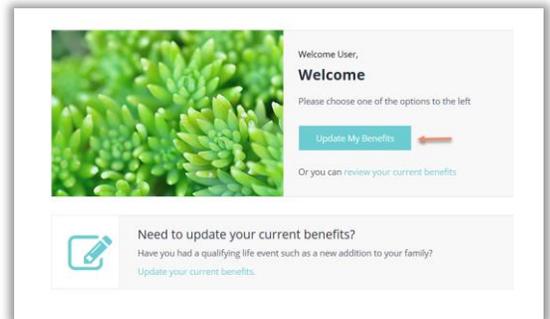
Password: Your birth date in YYYYMMDD format.

- For example: If your birth date is August 14, 1962, your password would be 19620814. At initial login, you will be prompted to change your password.



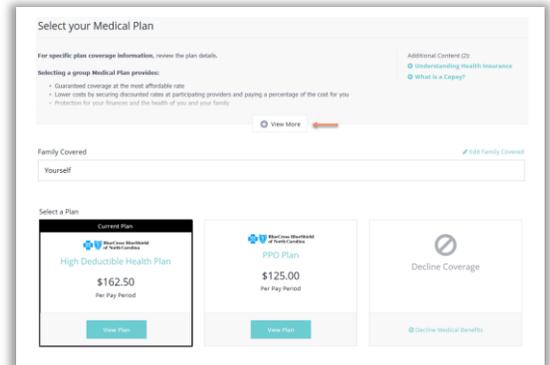
2. LAUNCH ENROLLMENT

- Click on "Update My Benefits" to begin. If you are a new hire or during Open Enrollment – this link will say "Get Started".



3. ENROLL

- Follow the enrollment through each step of the enrollment process from top to bottom
- In making your elections, choose the plan option of choice by clicking on "View Plan", then choose "Update Cart" or "Enrolled", or select the "Decline Coverage" option. Once you select your plan, the system will take you through to the next benefit.
- To view additional content about your plan, click on "View More" on the top section of your screen.
- If you want to make a change to who is covered under your plan, click on "Edit Family Covered" and you can uncheck any family members that should not be covered. Otherwise, all dependents will automatically be covered.



4. CONFIRM ENROLLMENT SELECTIONS

- Once you complete all coverage elections, you will land on the Confirmation Statement. Click the "Review and Checkout" button at the bottom of the page to complete your enrollment process. This button will not be available until all benefits have an election made. Review the benefits elected and when ready, click the "Checkout" button at the bottom of the page to complete your enrollment process. If your email address is in the system, you will automatically receive an email confirmation statement. If not, you can print out your confirmation statement.

