

PlanSource Self-Guided Enrollment Tour

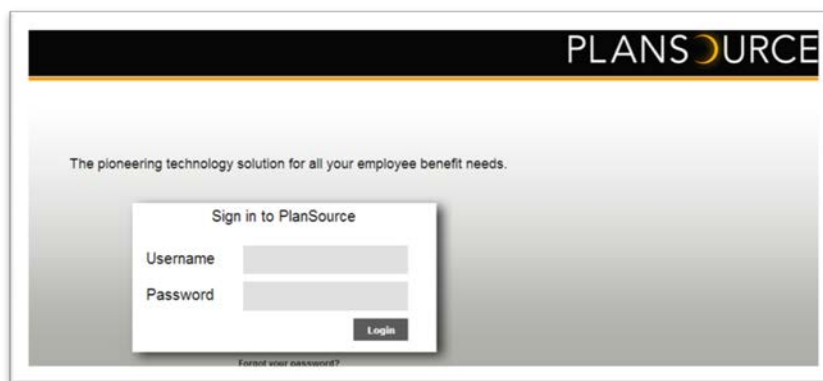
ENROLLING IN BENEFITS

Before you begin please make sure you have the following items:

- Social Security Number (SSN) for all legal dependents you wish to enroll in any coverage
- Date of Birth (DOB) for all legal dependents you wish to enroll in any coverage
- Beneficiary Information for Life Insurance, which includes your beneficiaries' name(s), DOB(s) and SSN(s)

LOGGING ON

Type in benefits.plansource.com into the address bar of your internet browser



If this is the first time you are using this site follow the instructions below for your user name and Password.

Your **Username** consists of:

1. First initial of your First Name;
2. First six characters of your Last Name;
3. Last four (4) digits of your SSN.

Example: John Employee, whose SSN is 000-00-1234, would have a login of **JEMPLOY1234**.

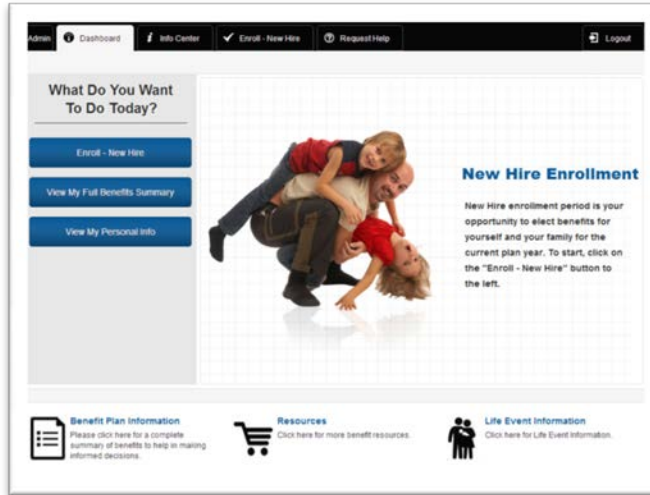
Your **Password** is your birthdate in the format YYYYMMDD. Example: a birthdate of February 7, 1975 would look like this: **19750207**.

First time users will be prompted to select a new Password. (**Note:** Every year during Open Enrollment your password will reset back to your birthdate in the YYYYMMDD format.)



WELCOME SCREEN

From this screen you will be able to enroll in or make changes to your benefits, see your benefits summary, review Benefit Plan Information among other resources. First we will go through the Enrollment Process; later in this document we will review steps to update enrollment information.



INTRODUCTION

You will be notified of the enrollment due date. You must complete your enrollment by this date. You also have until that date to revisit **benefits.plansource.com** to make any changes to your enrollment if necessary. Failure to enroll by the enrollment due date will result in **“NO COVERAGE”**.

- Click **Enroll – Annual**

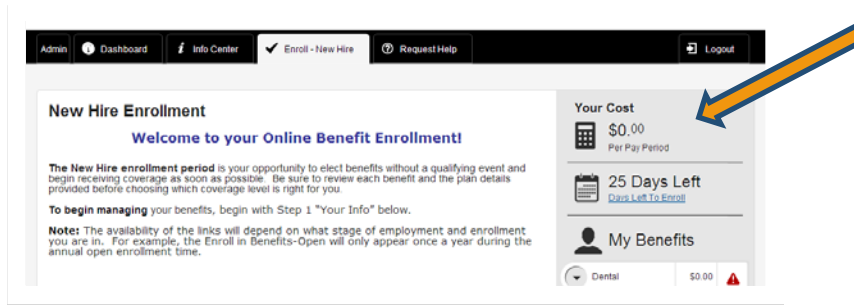


If you are not a new hire and it is not Annual Enrollment, you will see a link on the Dashboard page that will say **Make a Change to My Benefits.**)



BEGINNING THE ENROLLMENT

On each of the enrollment pages, the total Benefit Cost per pay period will appear in the upper right hand side of the enrollment screen as **Your Cost**.

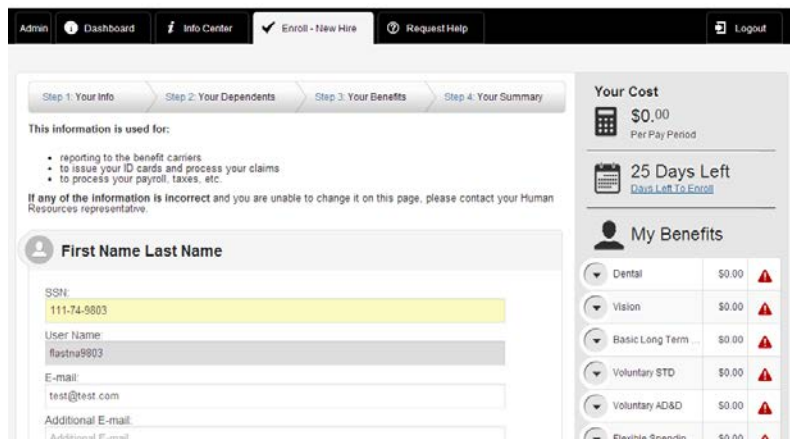


- This figure will automatically update as you make each benefit plan selection, and will keep a current amount of your per pay period costs (based on your employer pay period information)

There is also a reminder calendar that will provide you with the number of days you have left to enroll in your benefits and a listing of the benefits you have enrolled in.

Your Info

- Start by clicking the Continue button at Step 1.
- Read through this page and verify that all information is correct; if there are errors, you can modify the information or contact your HR representative for corrections
- Complete any information where the field is empty or incorrect
- Click **Continue**



ENROLLMENT NAVIGATION

Proceed through each enrollment page by using the continue button.

Use the back button to go back to a previous page – Do not use your browser’s back button.

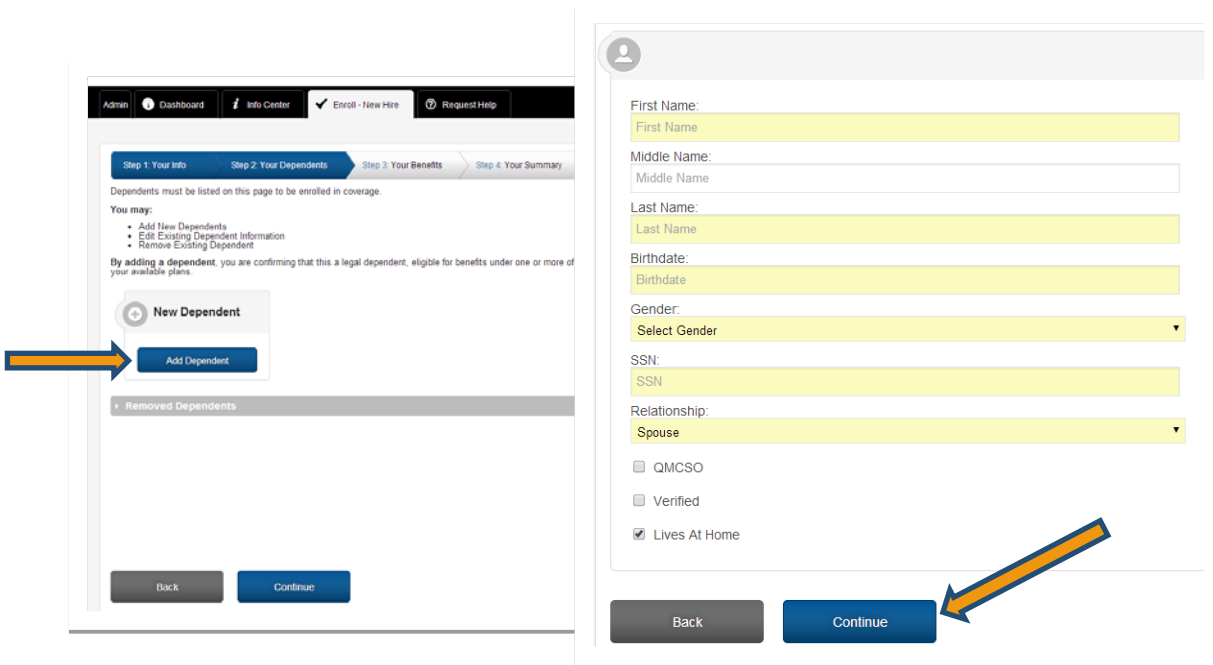
Please note: It is necessary to use the **Continue** button at the bottom of every page to access the next enrollment step. **Pressing Continue will also save your selections and enroll you in the plan that you selected.** You can logout and return to finish your enrollment at a later time (within your specified enrollment period)



ABOUT YOUR DEPENDENTS

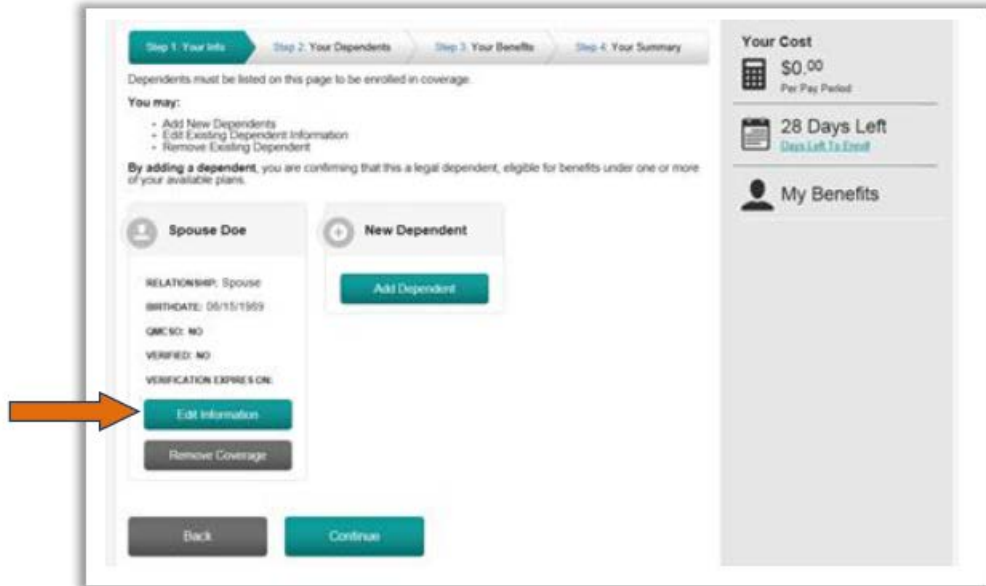
Any dependents (i.e. Spouse, Partner, and Child) need to be entered on this page. To enter a new dependent not currently listed on the page:

- Click **Add Dependent**
- Enter *Dependent Information* (including SSN and DOB)
- Click on **Relationship** drop down box and choose appropriate relationship
- If the dependent does not live at home, uncheck the “*Lives at Home*” box and add the address
- When you are finished adding all Dependents, Click **Continue**



To edit a dependent listed on the page:

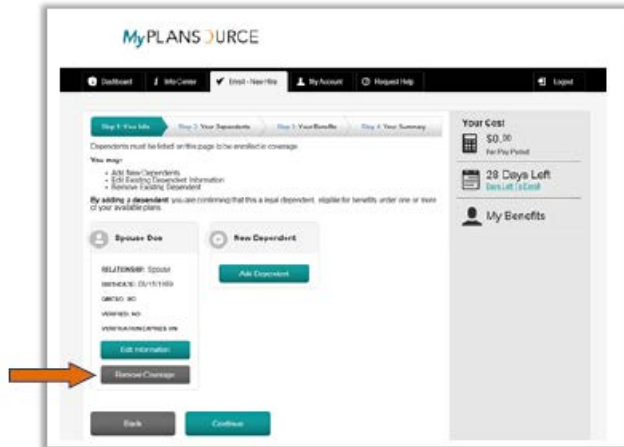
- Click on **Edit Information**



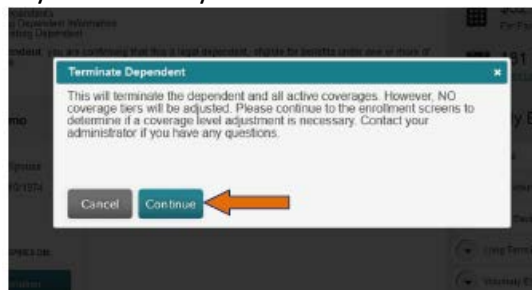
- Correct the dependent information
- Click **Continue**

To delete a dependent listed on the page:

- Click **Remove Coverage** link for the specific dependent to be removed



- Click **Continue** when asked if you are sure you wish to terminate this dependent



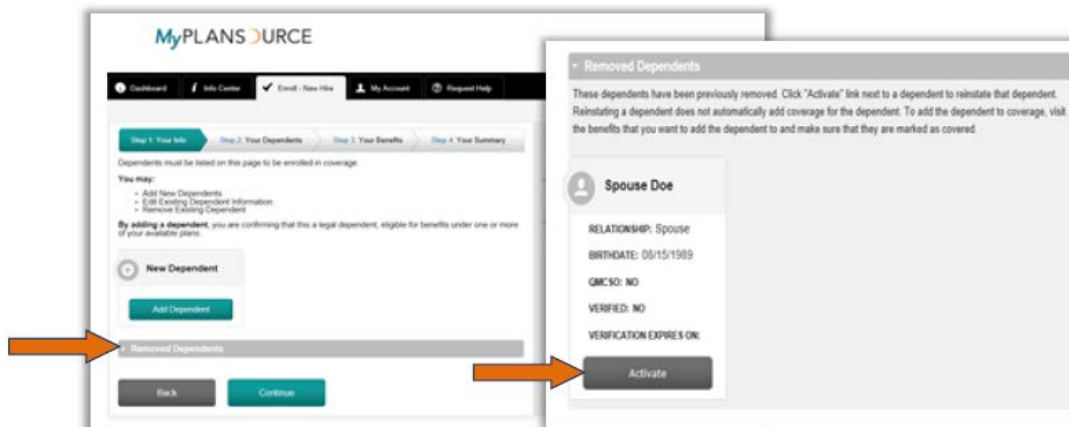
- The yellow warning is a reminder that you **must** continue through the enrollment and make sure the correct coverage level is selected for each benefit. (For example, if you removed your spouse from coverage, make sure your enrollment is changed to Employee Only or Employee + Children.)



Dependent has been terminated, HOWEVER: the tier HAS NOT been adjusted. Please continue to the coverage screen to review coverage and determine if a coverage level adjustment is necessary. Please review all affected benefits carefully. Contact your administrator if you have any questions.

To reactivate a dependent listed as removed:

- Click **Removed Dependents** – this will list all dependents that have previously been removed
- Click the **Activate** button under the specific dependent



ELECTING A PLAN

You must make a selection for each benefit even to decline a benefit. All the plans available to you will be listed on this page (the plans in the pictures below are of sample plans for demonstration purposes only).

- Click on the benefit you wish to enroll in

The screenshot shows the MyPLANSOURCE interface. On the left, there are links for Medical, Dental, Vision, Employee Assistance Program, Basic Employee Life, and Voluntary Employee Life. On the right, a 'Your Cost' section shows \$3.67 per pay period and '20 Days Left'. Below that, 'My Benefits' are listed: Employee Assist... (\$0.00), Basic Employee Life (\$0.00), and Basic Long Term... (\$1.67). Callouts include: 'Links to access each benefit' pointing to the benefit list; 'Cost calculator keeps track of your ongoing costs on each page' pointing to the cost section; and 'Currently Enrolled Plans will include any benefits provided at no cost by your employer.' pointing to the 'My Benefits' list.

On each Benefit Page – there will be links to various resources

This screenshot shows the 'Select your Medical Plan' page. It includes a 'Plan Documents' callout pointing to a 'Documents' tab, an 'Informational videos and checklists' callout pointing to an 'Information' tab, and a 'Current Enrollment' callout pointing to a dropdown menu showing 'Not Covered in Plan...'. The 'Your Cost' section shows \$3.67 per pay period and '28 Days Left'. The 'My Benefits' section shows Employee Assist... (\$0.00), Basic Employee Life (\$0.00), and Basic Long Term... (\$3.67).

DEPENDENTS ON A PLAN

When you click the button to select a plan that will include the addition of dependents – you will see the valid dependent information open up under that selection. Review to make sure the correct dependents will be covered under this benefit. If the box is not checked next to a listed dependent – they will **not** be covered under that benefit.

LEVELS	COST
<input type="radio"/> EMPLOYEE ONLY	\$47.68
<input checked="" type="radio"/> EMPLOYEE + 1 DEPENDENT	\$102.93
Note: All valid dependents have been automatically selected. Modify to remove unwanted selections (if any), then click continue.	
<input checked="" type="checkbox"/> Spouse Doe (Spouse 08/15/1988)	

If you forgot to add a dependent you wish to cover:

- Click the **Step 2: Your Dependents** link
- Add Dependent(s) as described above
- Click **Continue** to return to enrolling in benefits
- Verify new dependent is covered in your selected benefits



YOUR SUMMARY PAGE

This page lists all the benefits you elected: **Read through the entire page carefully and verify all information.**

The screenshot shows the 'Your Summary' page in the PlanSource system. It includes a progress bar at the top with steps: Step 1: Enroll, Step 2: Your Dependents, Step 3: Your Benefits, and Step 4: Your Summary (current). The page displays personal information, a list of dependents, and a detailed breakdown of selected benefits and their costs. Callout boxes with orange arrows point to the following areas:

- Verify All Personal Information:** Points to the top right section showing 'Your Card' and '28 Days Left'.
- Confirm all dependents are listed:** Points to the 'Your Dependents' section.
- Review your plan selections:** Points to the 'Medical' plan selection.
- Verify coverage levels:** Points to the 'Medical' plan details.
- Confirm correct dependent(s) added:** Points to the 'Dental' plan selection.
- Review per pay period deductions:** Points to the 'Dental' plan details.
- Confirm any life volume amounts and verify beneficiary:** Points to the 'Voluntary Employee Life' section.
- Review annual and per pay period amounts for spending accounts:** Points to the 'Health and Dependent Care Reimbursement Accounts' section.

Not all plans/benefits may be available for every associate. Please contact with your HR Department or your manager if you have any questions. To make any changes to your elections:

- Click the benefit that needs correction
- Make corrections
- Click **Continue** (which will bring you back to the Your Summary Page)
- Click **Confirm**

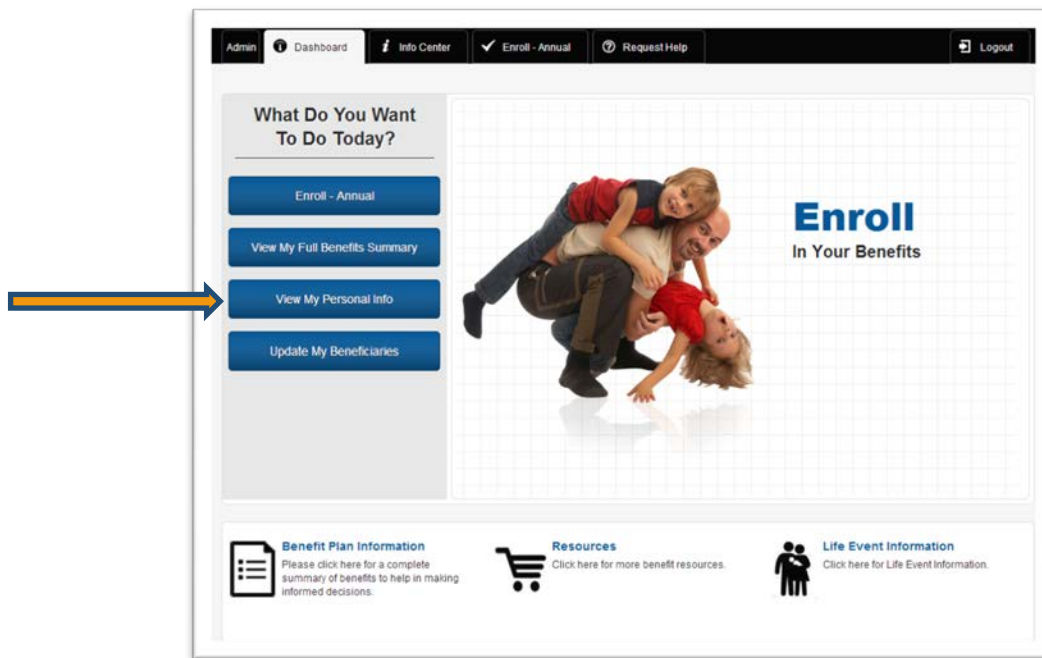
You are done! You can provide a current email address to have a copy of this confirmation statement emailed to you. You can also print your *Benefit Profile* using one of the icons at the top of the confirmation statement to create a hard copy or a PDF.



VIEWING YOUR INFORMATION AT ANY TIME

At any time throughout the year you can login to your account using your Username and your password. If you do not remember your password contact your Benefits Administrator to have your Password reset.

Click **View My Personal Information** to view your current information. Read through this page and verify that all information is correct; if there are errors, in you can modify the information or contact your HR representative for corrections.



VIEWING YOUR CURRENT BENEFITS

You can view your current benefits anytime.

- Click **View My Full Benefits Summary**
- Click the **Printer or the PDF icon** to print or create an electronic copy of your benefits

