

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 contact your HR Team to have these fields updated.
- Once completed click "Next: Review My Family" on the bottom of the page to move to the next step.

Verify your Personal Information and make changes if needed

This information is used for:

- reporting to the benefit carriers
- to issue your ID cards and process your claims
- to process your payroll, taxes, etc.

Fields that have an asterisk (*) are required. If any of the information is incorrect and you are unable to change it on this page, please contact your Human Resources representative.

Edit Info

Basic Information		Contact Information	
First Name *	Middle Name	Address 1 *	Address 2
Delmar		123 Main Street	
Last Name *	SSN *	City *	State *
TEST8733	852-58-9092	Evermore	Tennessee



Connecting you to what's next.

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Step 3: Review Your Dependents Information

- ❓ Verify your 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”

The screenshot shows the 'Review the Dependent Information' page. At the top, it says 'Review the Dependent Information on file below' and 'Dependents must be listed on this page to be enrolled in coverage.' Below this, it lists 'You may:' actions: 'Add New Dependents', 'Edit Existing Dependent Information', and 'Remove Existing Dependent'. A note states: 'By adding a dependent, you are confirming that this is a legal dependent, eligible for benefits under one or more of your available plans. To move to the next step click "Next: Shop for Benefits" at the bottom of the page.'

The 'Current Family Members' section displays two dependent cards:

- Nancy TESTER** (Spouse, Born 06/19/1959) with 'View Details', 'Remove', and 'Edit' buttons.
- Taneka TESTER** (Child, Born 06/03/1998) with 'View Details', 'Remove', and 'Edit' buttons.

A dashed box highlights an 'Add Family Member' button, with a callout: 'Click on "Add Family Member" to add a dependent to the system'. Another callout points to the 'Edit' button on the Taneka TESTER card: 'Click on "Edit" to update an existing family member record'. At the bottom, a 'Next: Shop for Benefits' button is highlighted with a callout: 'Once completed click on "Next: Shop for Benefits"'. A 'Back' button is also visible on the left.

Step 4: Enroll in Benefits

- ★ Benefit dashboard is grouped into the following sections: Election Required, Confirmation Required, and Plans to Review.
 - **The Election Required** section is where employees will select benefits requiring an election. This section will always appear first on the dashboard.
 - **The Confirmation Required** section is where employees are required to confirm whether they'd like to keep a benefit or make a change for the upcoming year.
 - **The Plans to Review** section is where employees can review passive benefits, they are already enrolled in. Employees can checkout without completing this section.



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- ★ 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.

Current Benefit Elections

Review Profile — Shop Benefits — Checkout

- To change an election, click directly on the name of the benefit.
- To complete enrollment, click continue at the bottom of the page.

New Enrollment Coverage effective from 07/01/2019 to 06/30/2020

Dental

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.

Select your Dental Plan

For specific plan coverage information, review the plan details.

Selecting a Dental Plan will provide preventive and treatment services at a percentage of the standard cost.

Most of us think first about having Medical insurance to cover the cost of treatment for medical conditions and accidents and **do not pay enough attention to the need for Dental insurance.**

- ★ Review the dependents that you would like to enroll in each plan by selecting "Edit Family Coverage" button and selecting the family members you would like to enroll for each benefit.
- ★ 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".

Family Covered

Yourself, Jose, Josie, Linnie

Edit Family Covered

Select a Plan

Guardian	Guardian	Decline Coverage
Guardian Base Plan	Guardian Buyup Plan	
\$43.55 Per Pay Period	\$56.40 Per Pay Period	
Basic 100% co Minor 80% cov Major 50% cov	Basic 100% co Minor 80% cov Major 50% cov	
View Plan	View Plan	Decline Dental Benefits
<input type="checkbox"/> Compare	<input type="checkbox"/> Compare	

Click on "Edit Family Coverage" to select the family members you would enrolled under each benefit

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

Click on "Decline" to decline the plan



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- ★ 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.

Dental: Guardian Base Plan

[← To Available Plans](#)

Important Information

Guardian Insurance The Guardian Life Insurance Company of America, New York, NY
Guardian Employee Benefits

Family Covered

[Edit Family Covered](#)

Yourself, Jose, Josie, Linnie

Coverage Levels

Employee Only	\$11.71 Per Pay Period
Employee + Spouse	\$23.33 Per Pay Period
Employee + Children	\$23.83 Per Pay Period
Employee + Family	\$43.55 Per Pay Period

Guardian
Guardian Base Plan

\$43.55
Per Pay Period

[Update Cart](#)

[Decline Dental Benefits](#)

Review the Family to be covered in plan. To update or change click "Edit Family Covered"

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](#)

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

You must select or decline all coverages before moving on

- 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.*****



Connecting you to what's next.

PlanSource Online Enrollment Instructions

- 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

Contact Partners Benefit Team with any questions.



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