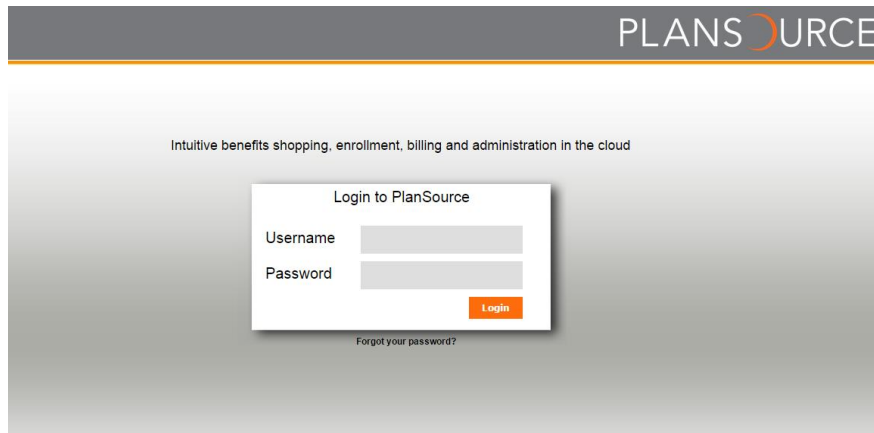


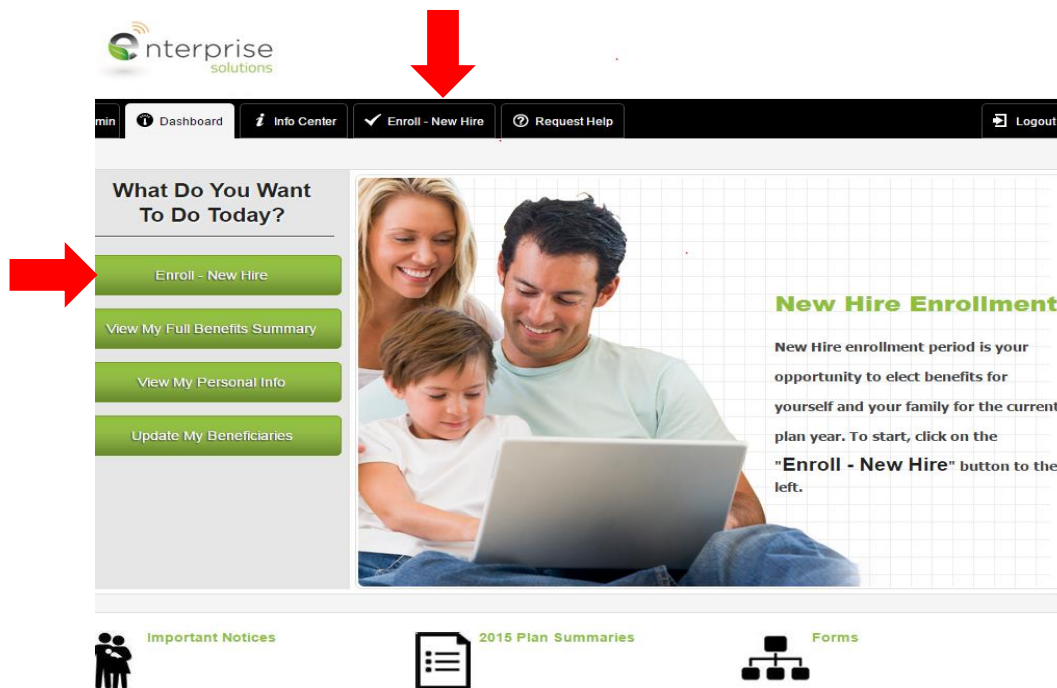
## Log in

- URL: 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 name 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".



## Launch Enrollment

- Click **Enroll- New Hire** in the Dashboard in order to begin enrollment.



## Verify Your Personal and Family Information

- Begin Step 1 **Your Info**, select **Continue**.

1 **Your Info**  
In this step you will review, verify, and if necessary, update your personal information. You will only be allowed to update the information allowed by your administrator. **Continue**

2 **Your Dependents**  
In this step you will verify and/or update your dependents. All dependents that you plan to include in your benefit elections need to be added in this step. Pending

3 **Enroll in Your Benefits**  
In this step you will make all of your benefit elections. You will be allowed to make benefit selections for all of the benefits for which you are eligible. Pending

4 **Summary and Review**  
In this step you will review all of your elections and have the option of emailing yourself a confirmation summary of your benefit elections. Pending

- Step 1: Verify your personal information, and then click **Continue** at the bottom of the page.
  - Any fields in yellow are able to be updated but cannot be left blank.
  - Any fields in white are able to be updated but can be left blank, they are optional.
  - Any fields in grey are just information and can only be updated with your benefit administrator.

**Bennie Test**

SSN: 421-31-8220

User Name: bhend8220

E-mail: jewels@enterpriseilco.com

First Name: Bennie

Middle Name: Middle Name

Last Name: Test

Address 1: 3815 Hammonds Ferry

Address 2: Address 2

City: Oviedo

State: Florida Zip: 32788

Country: United States

Home Phone: 015-444-5555

Gender: Male

Marital Status: Married

Current Salary: 75000.0

Hire Date: 01/02/2014

Birthdate: 11/19/1980

Back Continue



# PlanSource Online Enrollment Instructions

- Step 2: Verify your family information, Edit Information by using the **Edit Information** on any existing dependent on file. Add any eligible dependents by clicking **Add Dependent**. When you are satisfied, click **Continue**.

## Make Your Benefit Elections

- After clicking **Continue** on the dependent review, the first benefit will be available to make an election.
- Once you have decided on a plan, choose your desired tier underneath that plan name. Ensure that any dependents to be covered have the box checked next to their name (pictured below), and then click the Continue button.

- Walk through each screen and make your selections to enroll or waive each plan, click **Continue** at the bottom of each section to move to the next step.
- Certain enrollment levels will require Evidence of Insurability (EOI) or special approval. You may be required to fill out an application as part of the approval process. If you elect a coverage that requires an Evidence of Insurability this will be noted on the election (\* EOI Required). The form will be available to download when you click continue, or in the InfoCenter.



# PlanSource Online Enrollment Instructions

- If you elect voluntary life insurance, you will be required to designate your beneficiaries.
  - Click **Add Primary**, select an existing dependent as the beneficiary from the drop down list or enter the name, relationship, and allocation amount (% this beneficiary is to receive of the benefit). Click **Save**.

- Multiple beneficiaries can be added as a primary or secondary, allocations in each area much equal 100%.

## Confirm and Save your Enrollment

- Once you have finished making elections, you will be directed to the Confirmation Statement.
  - If you'd like to make a change in your any of the elections on the summary, click the benefit name to return to the selections.

- When you click **Confirm**, your enrollment is saved, and you will receive a confirmation email. **You must click the Confirm button in order to complete the enrollment.**

- You are able to Print your confirmation statement during **Step 4** or from the Dashboard **View My Full Benefits Summary**.

- Any benefits that require an Evidence of Insurability form will be listed as pending coverage.



Voluntary Spouse Life & AD&D			
ELECTION	DATES	YOUR COST	EMPLOYER COST
Lincoln Voluntary Spouse Life and AD&D - Enrolled	Start Date: 01/01/2015		
Volume: \$50,000.00			
Spouse Test (Spouse)	Start Date: 01/01/2015		
<b>Pending Coverage Election</b>			
Lincoln Voluntary Spouse Life and AD&D - Enrolled			
Volume: \$55,000.00			
You have requested coverage of \$55,000.00. Of this amount, \$5,000.00 is subject to approval. If approved, your cost will increase \$			
Spouse Test (Spouse)			

- Contact your Human Resource if any updates are needed.
- To view current Benefits Summary click **View My Full Benefits Summary** in the Dashboard.

