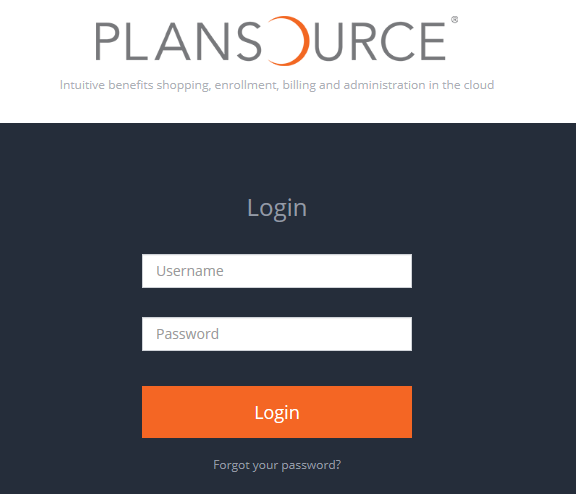
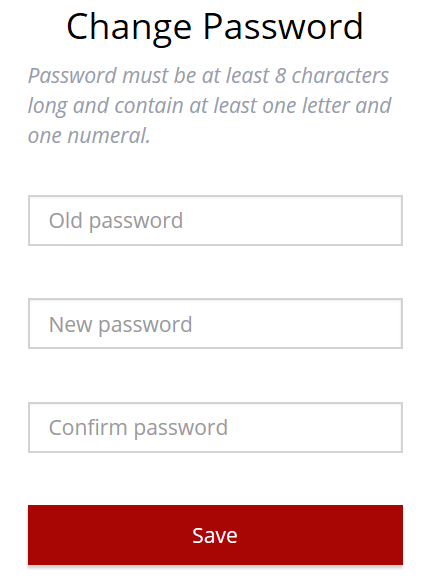
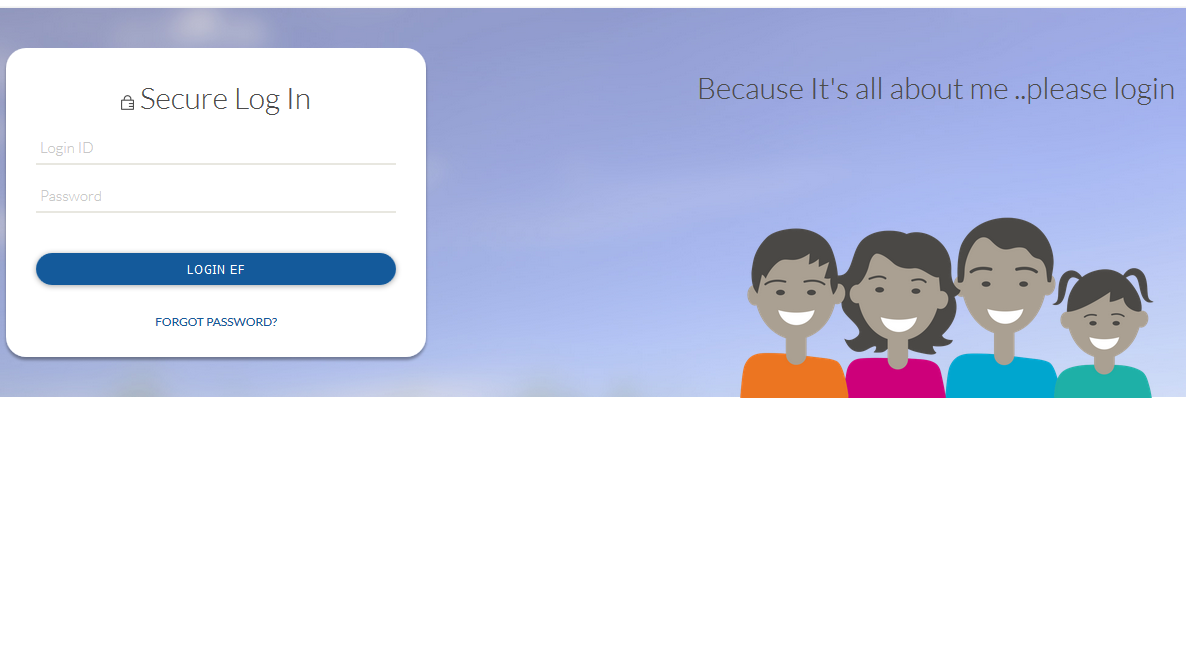
Self Service Enrollment Guide (SHORT)

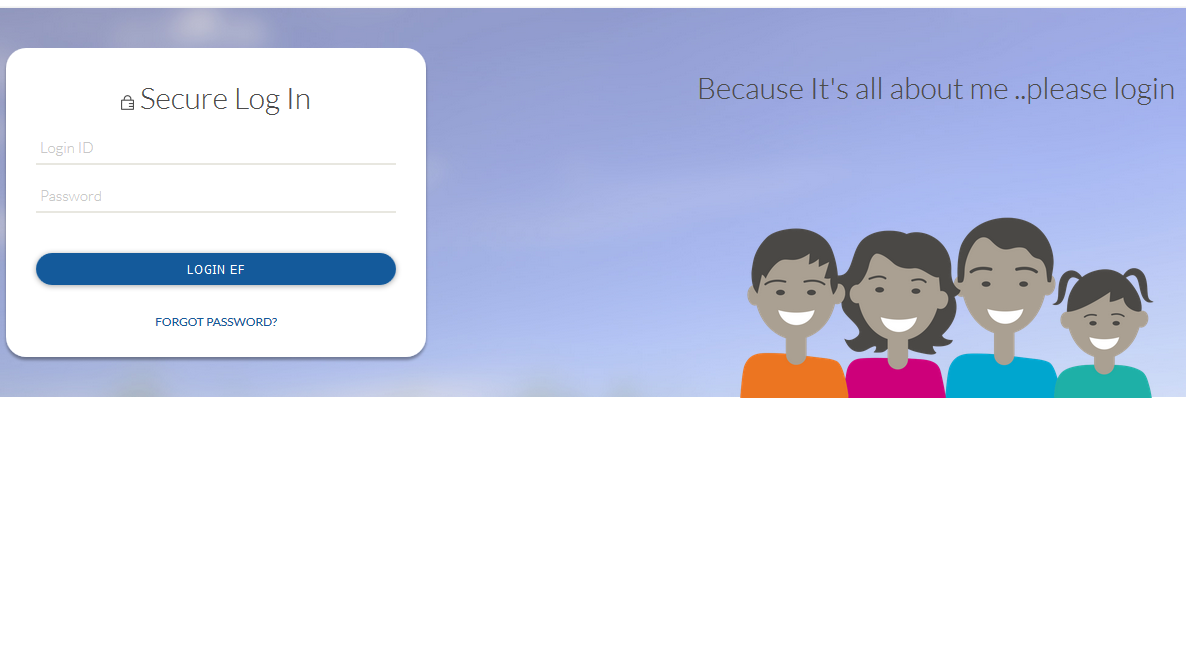
# Online Enrollment Instructions

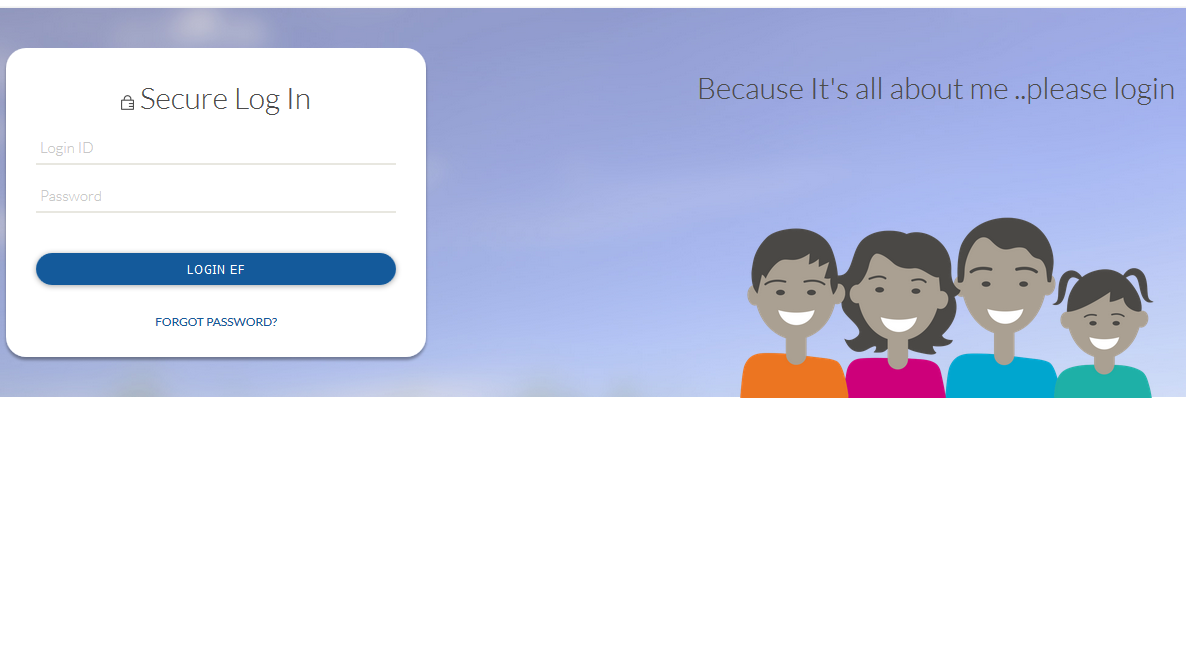
### Logging On

Type in <https://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 Username and Password. After your initial log in, you will be prompted to change your password.

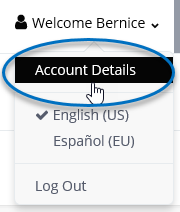
1. The username consists of the first initial of your first name followed by the first six characters of your last name and last four digits of your Social Security number.
2. The temporary password is your date of birth, in the format YYYYMMDD.

**Example:** Rebecca Gray, XXX-XX-2345, August 14, 1962

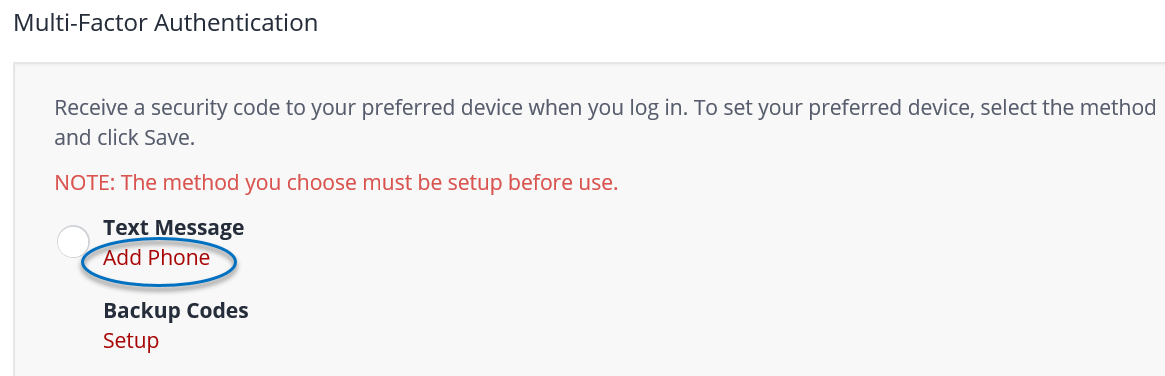
**Login:** rgray2345 **Password:** 19620814

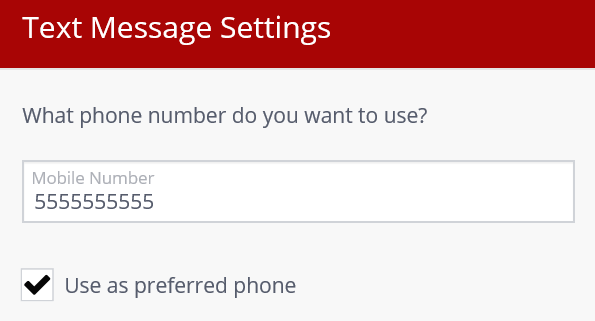
## Multi-Factor Authentication

You may be required to set up MFA in your Account Page. Select ***Account Details*** from the top right dropdown that appears under your name.

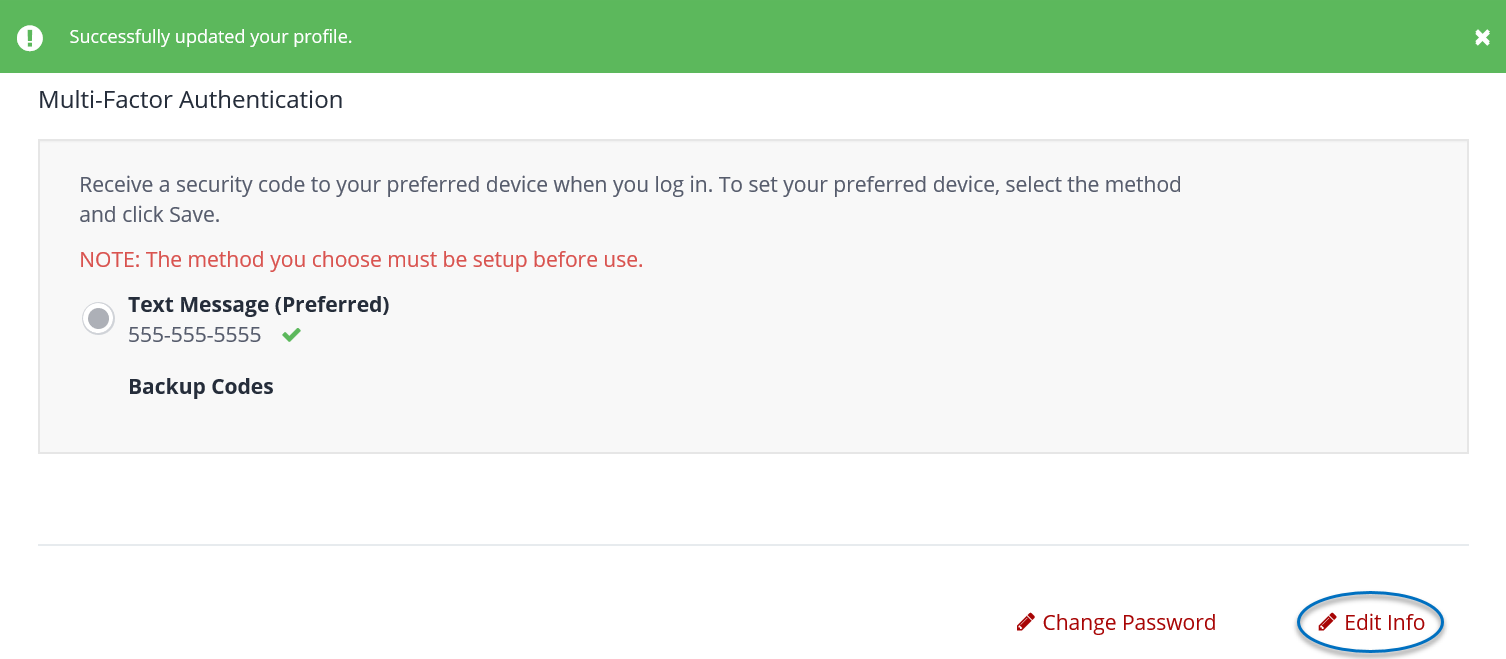


To setup a new phone, click on ***Add Phone*** under Text Message. Then enter a mobile number where you can receive texts.

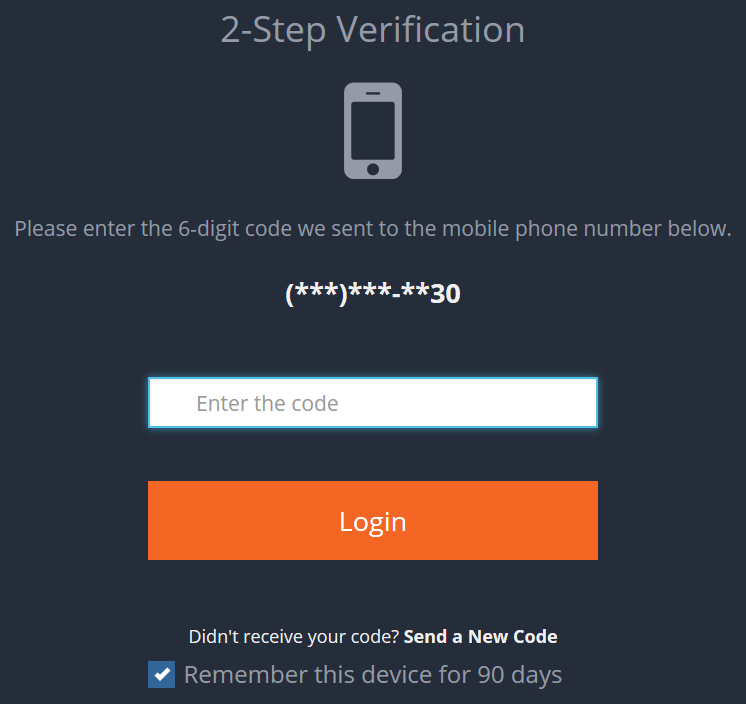




After you confirm your number, you have successfully setup your mobile phone for MFA and should now see the number underneath the Text Message method. Clicking ***Edit Info*** will allow you to edit or remove your phone.

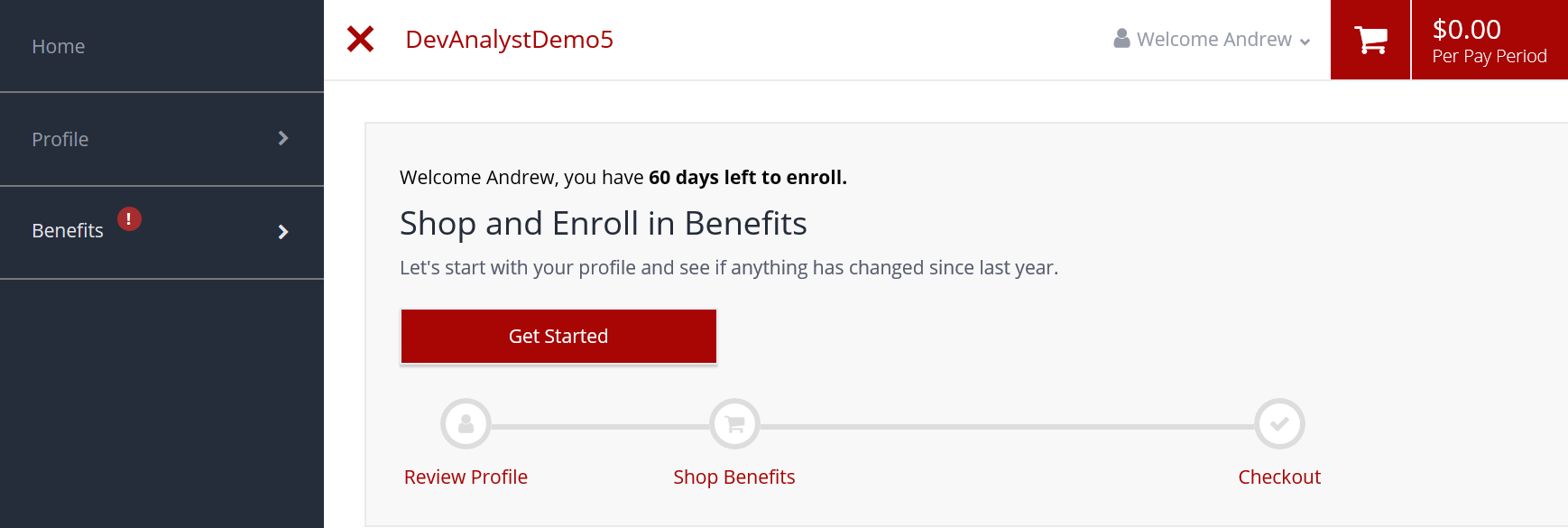


The next time you login, you will be required to enter the code sent to your mobile phone number.



## Welcome Screen

From this screen, you will be able to enroll in or make changes to your benefits, see your benefits summary, and review Benefit Plan Information among other resources.



Number of days left to enroll.

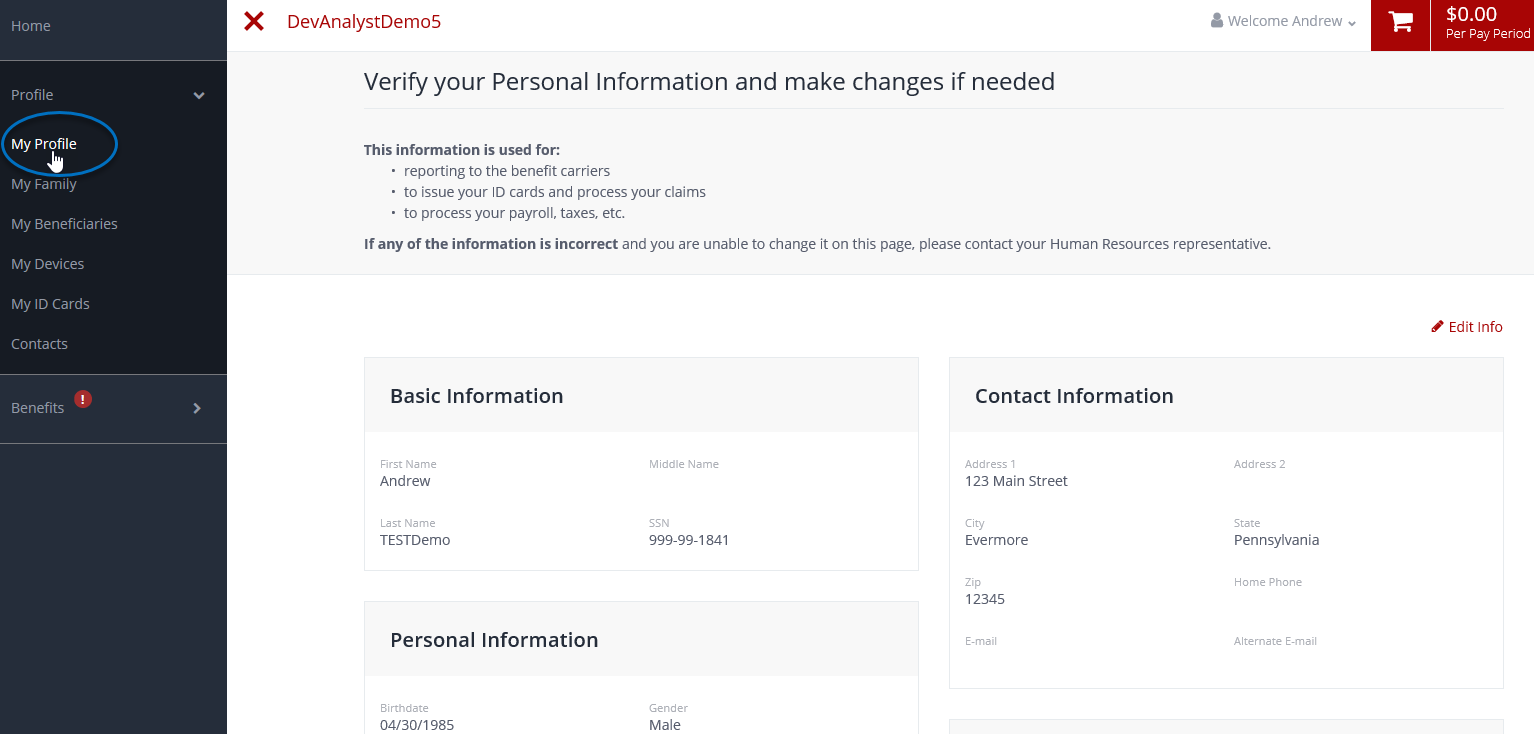
Your shopping cart shows benefit selections and changes

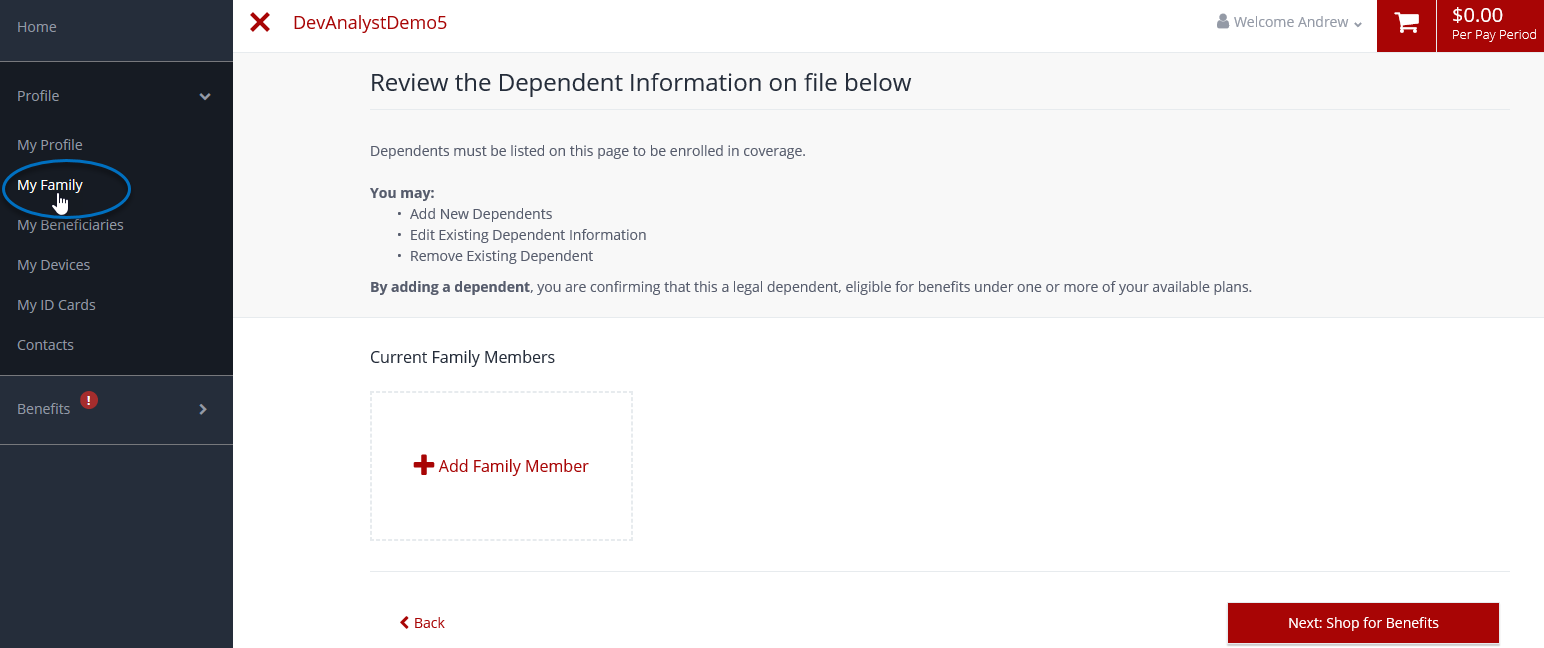
Enrollment timeline shows your progress in enrollment

Side bar expands and collapses

## Introduction

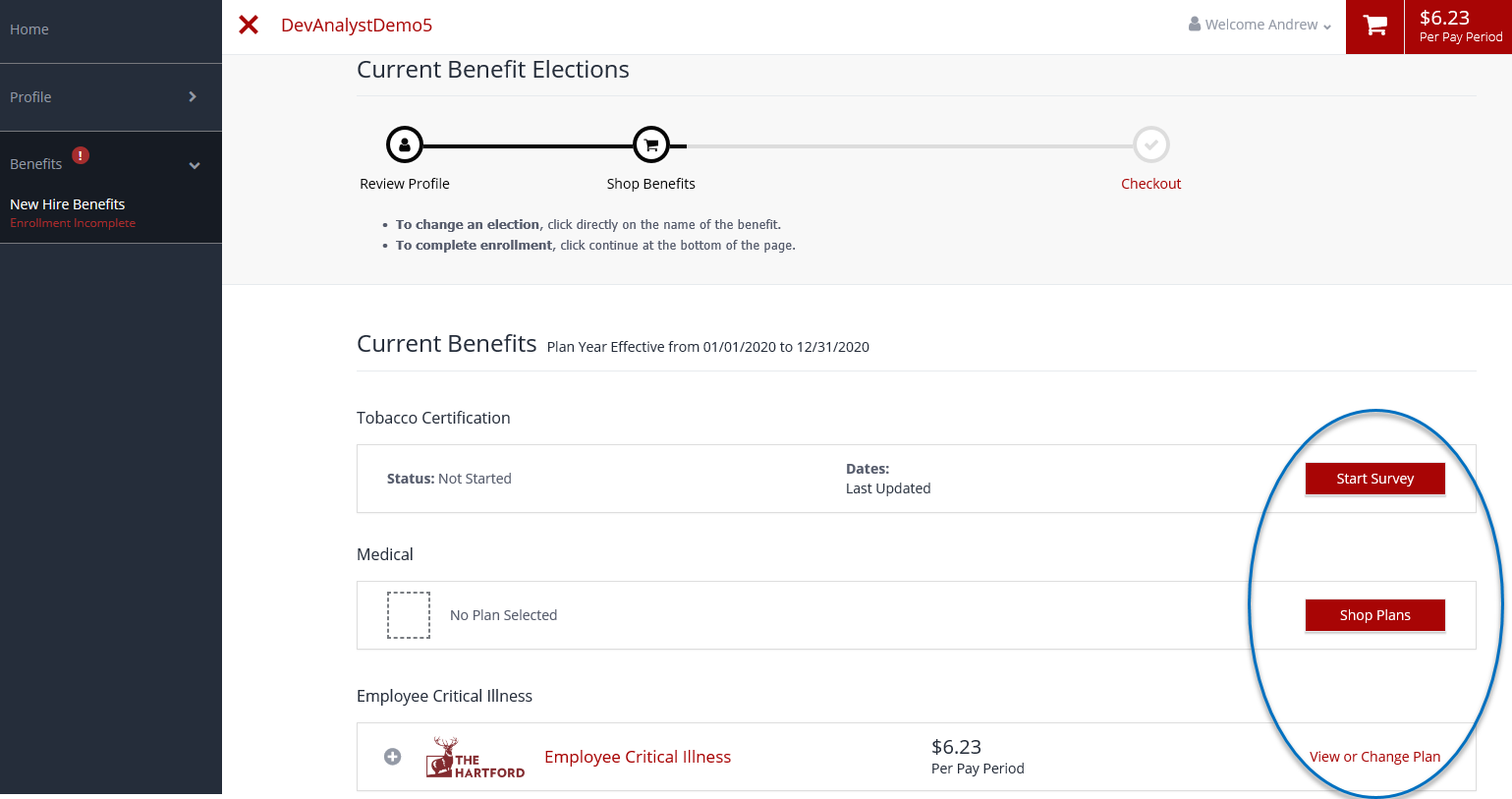
Once you select ***Get Started***, you will be taken to the My Profile and My Family pages. On the My Profile page, review your personal information to ensure it is correct. If changes are needed, you can contact your HR representative. Next, you will add any dependents you wish to enroll in coverage on the My Family page. Click ***Next: Shop for Benefits*** to begin electing your benefit plans.

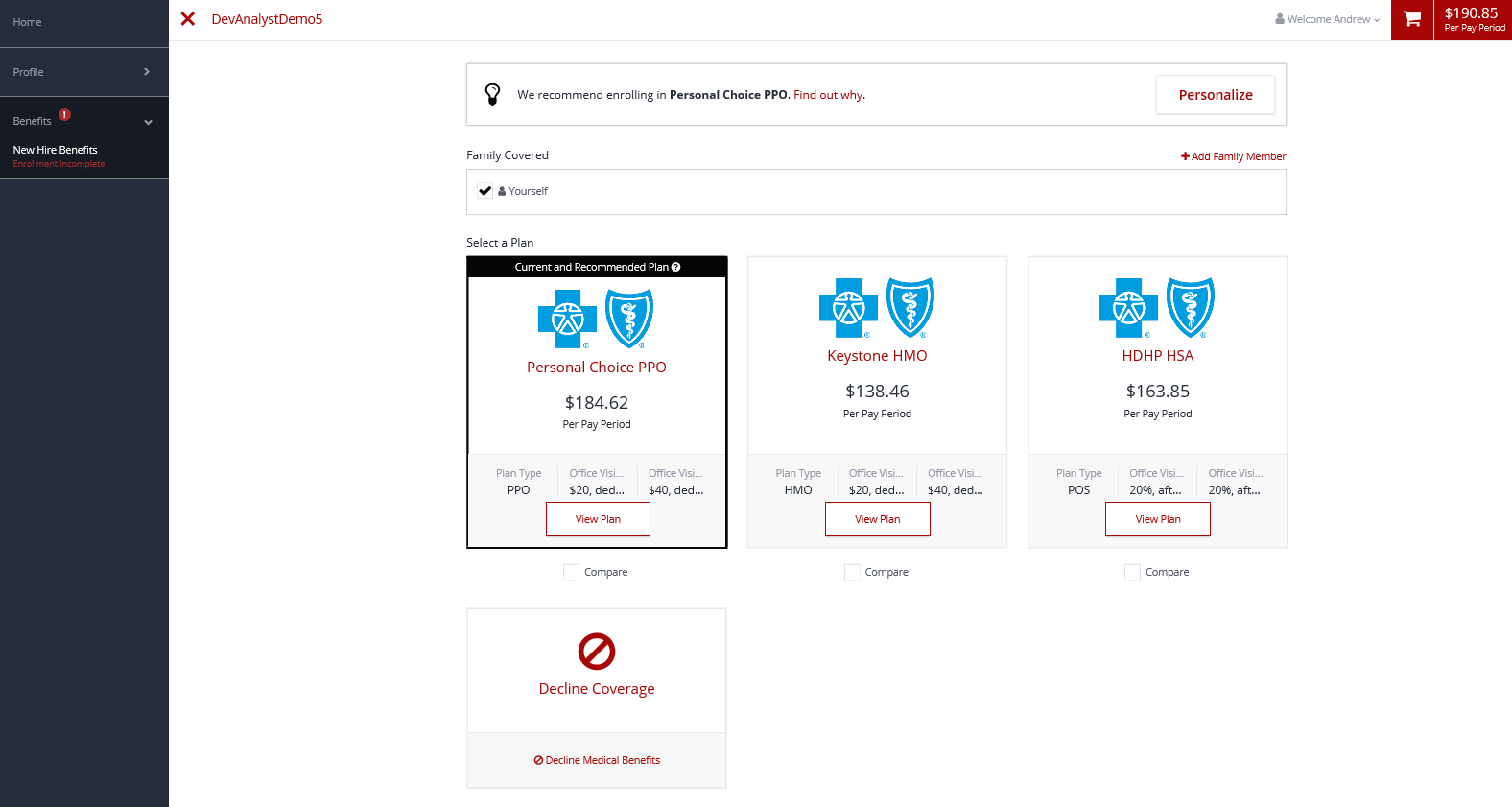




## Electing Your Benefits

From your Current Benefits Elections page, you can begin your enrollment by selecting ***Shop Plans*** beside the benefit that has yet to be elected, or to change any of your current plans, select ***View or Change Plan*** beside the existing benefit.





Click on the shopping cart to expand and view your benefit selections and progress in the enrollment.

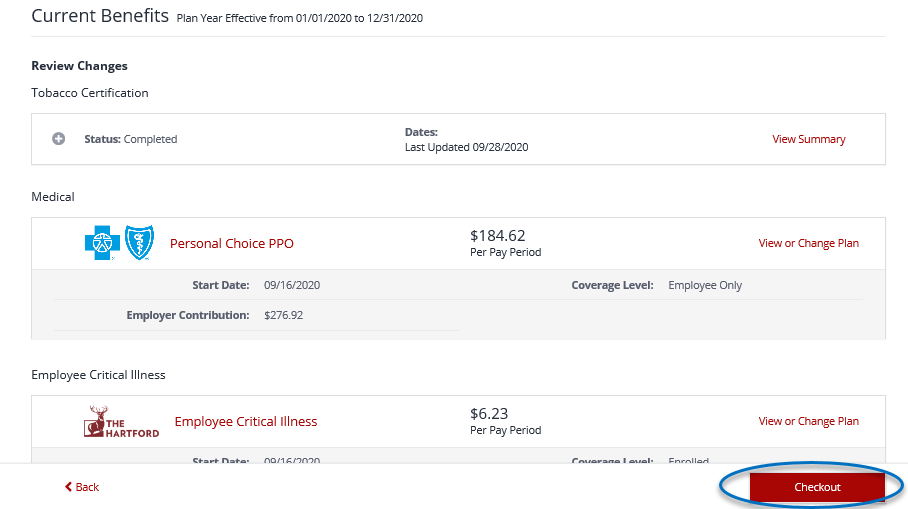
See who is currently enrolled, add/remove dependents to the plan.

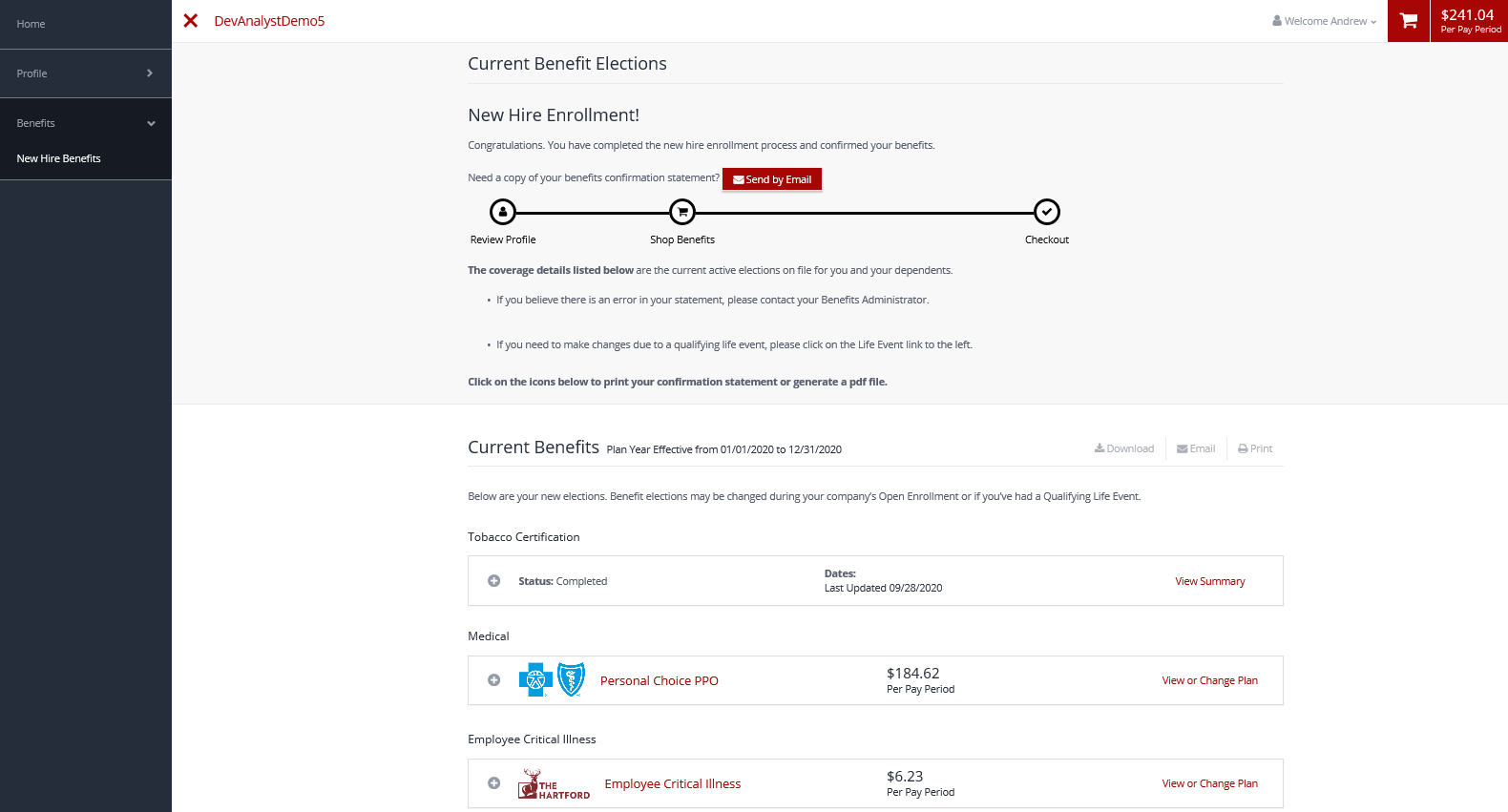
Click View Plan to make your selection and see more information on the plan.

Compare different plan choices by clicking the box labeled Compare. Once the boxes are checked for plans you wish to compare, click on the Compare button above the plans.

## Review Enrollment Selections & Checkout

* Once you complete all of your benefit elections, you will land on the Current Benefit Elections page showing everything that has been elected. To make an additional change, select ***View or Change Plan*** beside the corresponding benefit.
* You **MUST** select ***Review and Checkout***and then ***Checkout*** in order for your benefits to be saved. **If this is not done, your elections will be lost and you will not have benefits.**
* After Checkout, you have the option to download, email, or print a copy of your confirmation statement.





Timeline shows if you have reached Checkout.

Download, Email, or Print your confirmation statement.

**It’s important to remember that this is a year-round portal, which allows you to visit frequently to confirm your benefit elections, make qualified life event changes, and obtain important documents from the Document Library. If you have questions, please contact [Editor’s note: insert Client Specific Benefits Service Center # and hours here].**