PLANSOURCE

Employee Experience

Enrollment Guide

Confidential and Proprietary

PLANSOURCE

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Getting Started

So you're ready to enroll in your employer provided benefits! The new PlanSource enrollment experience will help you do just that, in an intuitive, educational and fun way.

Before you begin enrolling in your benefits, 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)

Log in to PlanSource

Before you can do anything in the PlanSource system, you must first log in with your username and password.

1. Type or paste this link into your web browser's search bar: https://benefits.plansource.com/
2. On the login page, type your username and password.
3. 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:

   a. Your LSPS.ORG email in ALL CAPS

Example: John Employee would have a login of JEMPLOYEE@LSPS.ORG.

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.) If you forgot your password, click forgot your password. If you have no email address on file for this process, contact your account manager.

Welcome Screen

From this screen you will be able to begin your enrollment, make changes to your benefits, see your benefits summary, and 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.

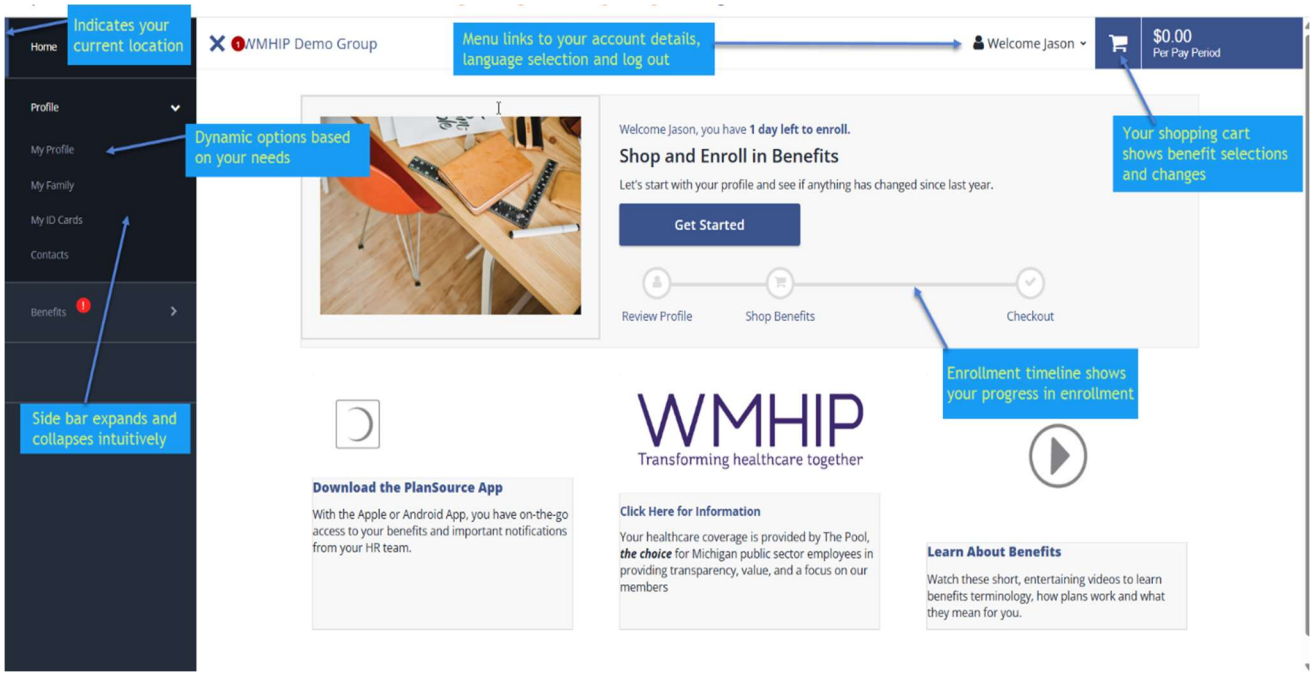

Figure 1 Welcome Screen

Overview

At the top of the screen you'll see how many days you have left to enroll, whether you're a new hire or in an open enrollment window. You also have until that time to revisit benefits.plansource.com to make any changes to your enrollment. Failure to enroll by the enrollment due date will result in "NO COVERAGE".

1. Review the timeline. The timeline will show where you are, or where you left off in the enrollment process.
2. Click Get Started

If you are not a new hire and it is not Annual Enrollment, select the Benefits link in the side menu then select Update your Current Benefits.

Updating Your Information

After you select Get Started, you will be taken through a series of steps in order to update your own personal information and your dependents information.

Review Your Profile

The first step in your enrollment process is to review your profile. Read through this page and verify that all information is correct; if there are errors, you can modify the information by selecting "Edit Info" or contact your HR representative for corrections. Complete any information where the field is empty or incorrect. Once you have completed your updates, select "Save". Then select "Next: Review My Family".

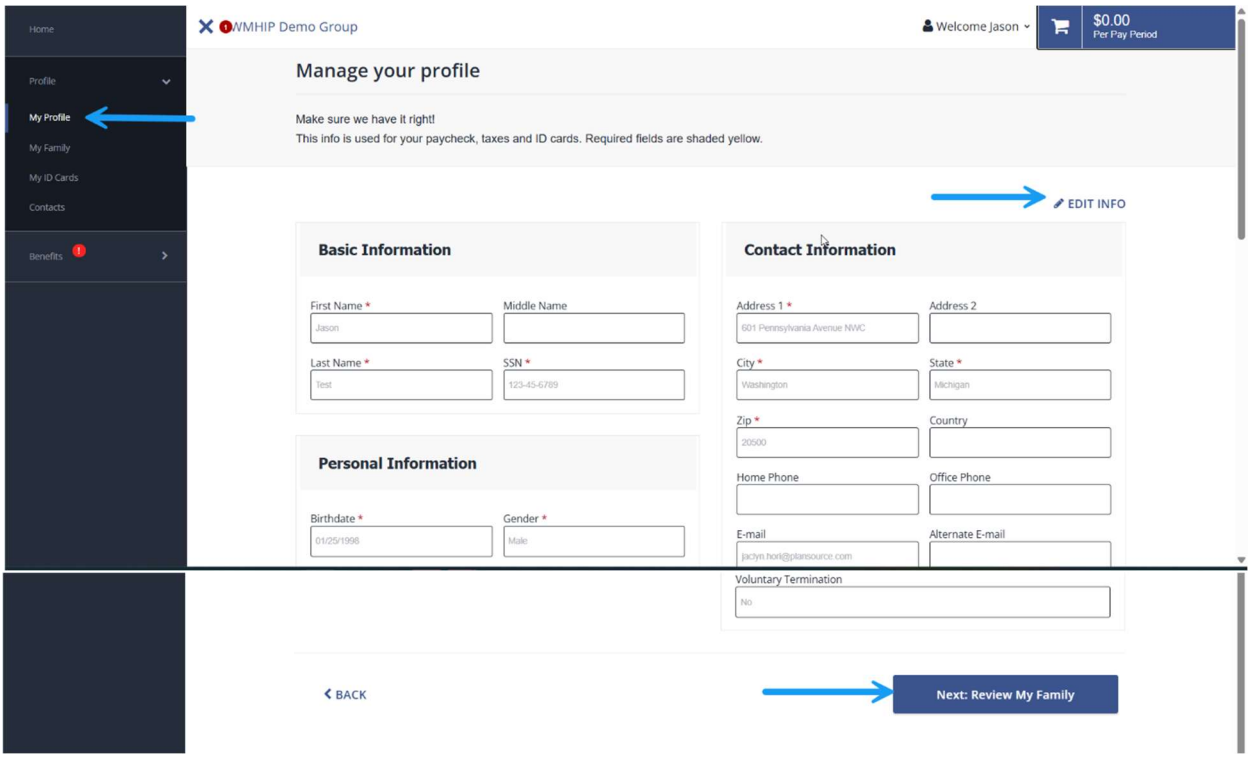

Figure 2 Review Your Profile

Adding Dependents and Beneficiaries

After you review your profile, you will have an option to add dependents. Each dependent you add is capable of being a beneficiary. However, adding dependents (i.e. Spouse, Partner, and Child) can be done on any page of the enrollment. To enter a new dependent not currently listed on the page:

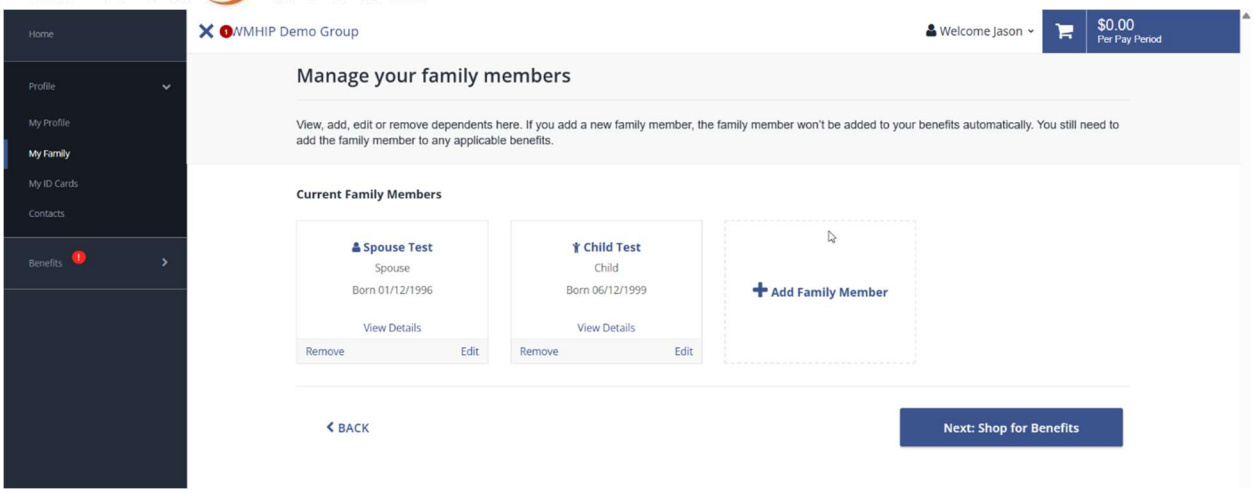

Figure 3 Adding Dependents

1. Click the Add Family Member box. This will open a new page
2. On the new page, enter the dependent information as shown below.

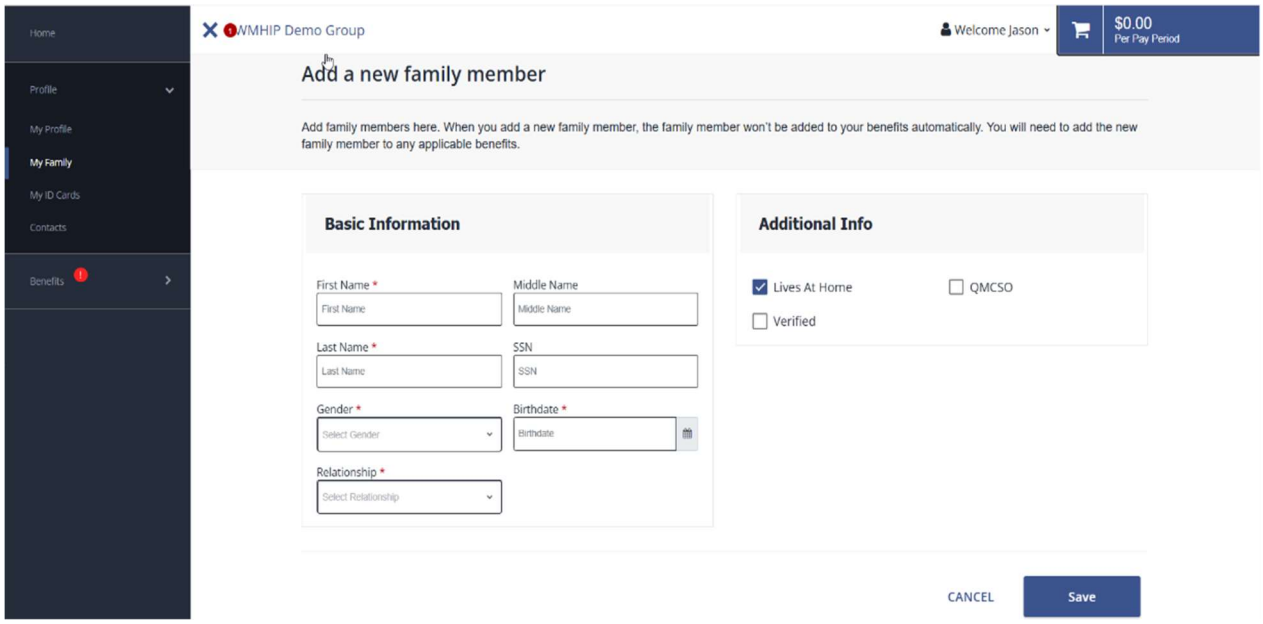

Figure 4 Dependent Information

3. Select Save.

Once you have saved your dependent, you will be sent back to the Manage you family members page. This allows you to add or remove family members before you move on. When finished with your updates select "Next: Shop for Benefits".

Shop for Benefits

You've checked your profile information, and added dependents. Now you're looking at your benefits dashboard, and you're ready to shop! You'll see available options in the middle of your screen, and the total Benefit Cost per pay period will appear in the upper right hand side of the enrollment screen in your cart.

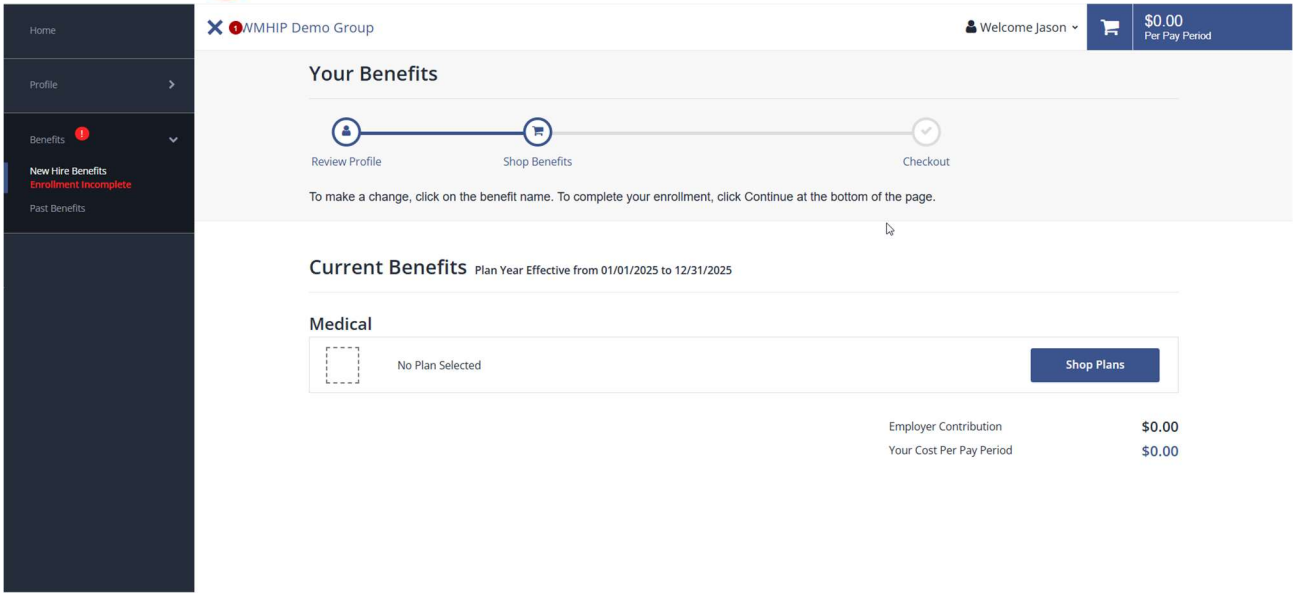

Figure 5 Benefits Selection

This figure (the dollar amount in your cart) 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). If you expand your cart, you will see your benefit options and selections.

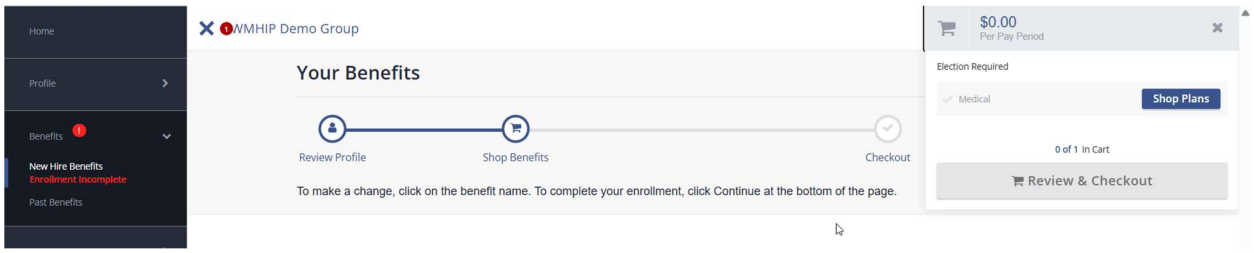

Figure 6 View Cart

You must select Review and Checkout at the end of your enrollment for your benefits to be in force! You can select it within the cart or at the bottom right of the Benefits Selection page.

Enrollment Navigation

In order to proceed through each enrollment page, use the Shop Plans button next to the first benefit type.

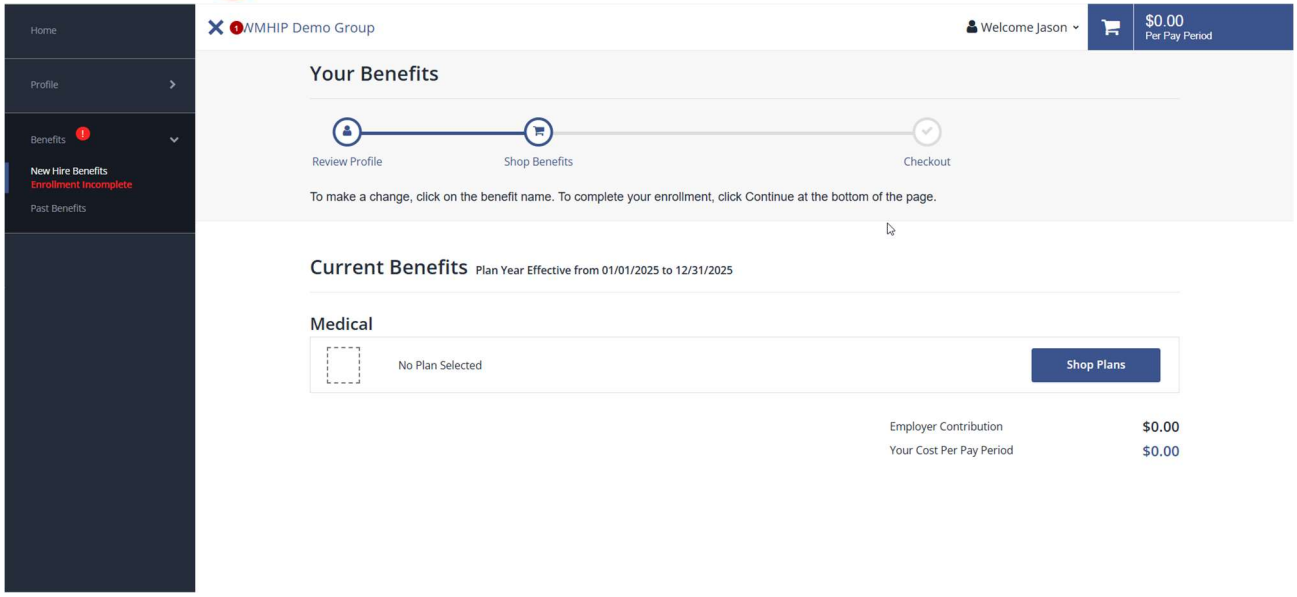

Figure 7 Benefits Election Page

Use the back button to go back to a previous page – Do not use your browser's back button. Below you will see that we've started you with medical. On each benefits page, you can still compare plans, edit who's covered, and get information related to your benefits.

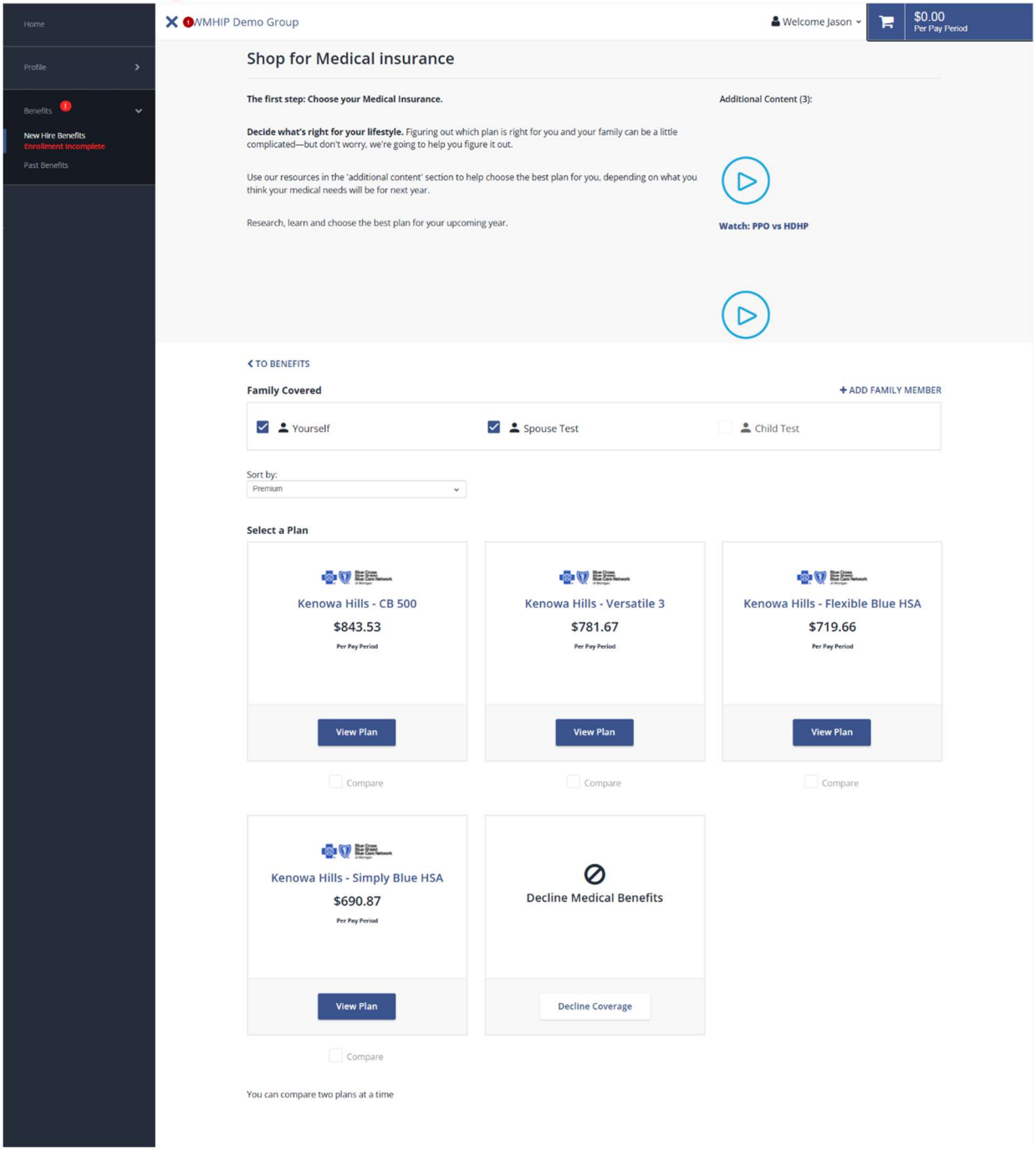

Figure 8 Shop Plans

The left hand navigation menu will dynamically change based on where you are in your enrollment.

Electing a Plan

All the plans available to you will be listed on the Plan Cards page (see above; the plans in the figures are of sample plans for demonstration purposes only). So, after you've reviewed your options, learned about that benefit type and decided what plan is right for you and your family, you'll need to select your benefit.

- This is where you can edit who you want to cover with your benefits.
- Click on the benefit you wish to enroll in.

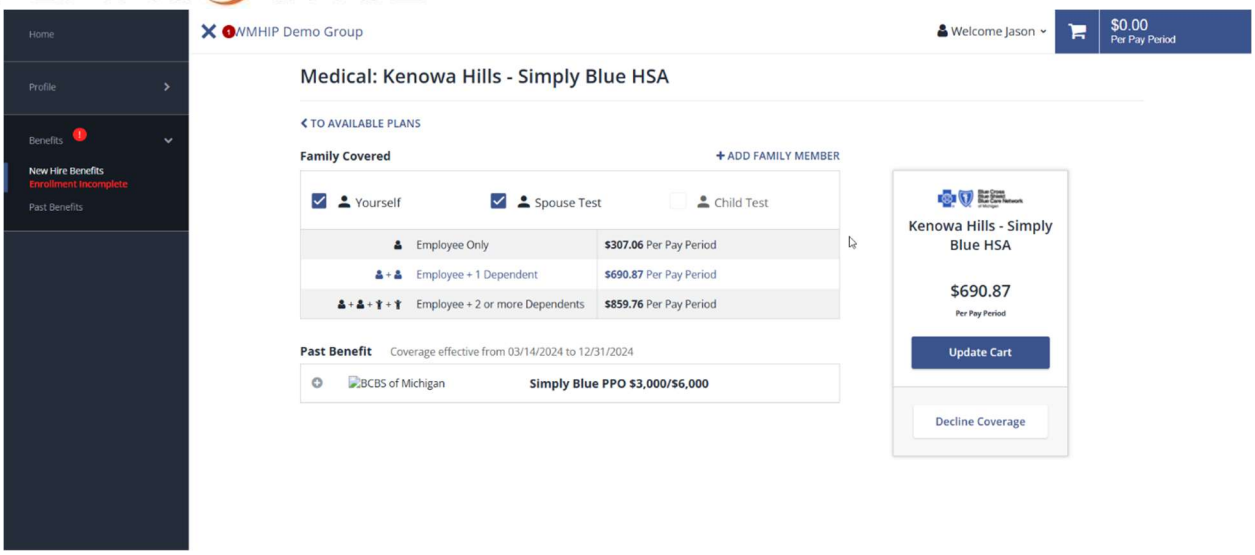

Figure 9 Update Cart

On this page, you can, again, Edit Who's Covered (add dependents to this plan, or even add dependents that you forgot), review the coverage cost by tier, and see the full plan details. For a benefit with multiple plan options you will be taken back the plan cards view if you decide to add dependents. If there is a single plan offered for that benefit you will go directly to the plan details page shown above.

If this is the right plan for you, simply click 'Update Cart' on the medical card at the right-hand side of the page. Once you update your cart, you will be moved to the next benefit type page which will, again, show you all plan options for that benefit type. Once you select a plan to view, you again will be allowed to edit dependents, see coverage amounts by tier, and review the plan types.

As you shop for more benefits, your dashboard page will show progress and your cart will update with the total price.

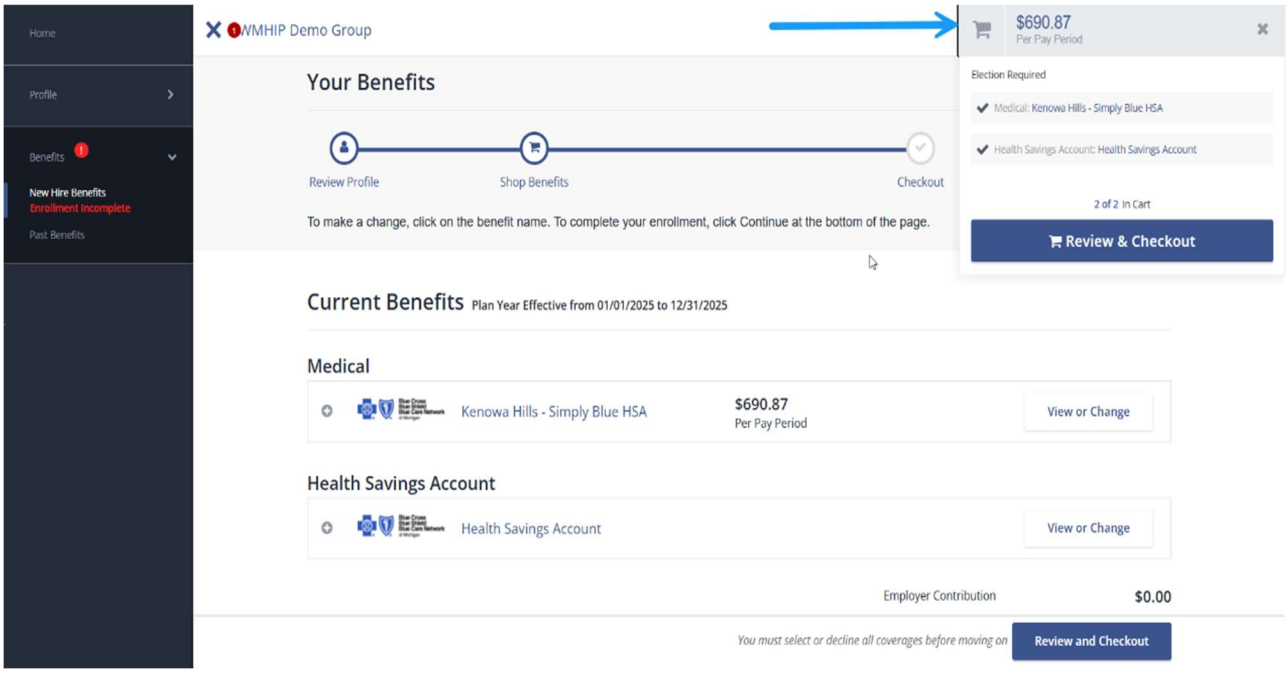

Figure 10 Dashboard Page Progress

To change your benefits from your dashboard, simply click Change Plan next to the benefit type you would like to update. When you have completed your elections you must click **Review & Checkout** for your benefits to be SAVED AND ELECTED! Think shopping online, if you don't Checkout then you won't get anything!

Enrollment Confirmation

This page lists all the benefits you elected: Read through the entire page carefully and verify all information. Your cost is at the top in your cart, and your confirmed plan elections are shown below. You'll notice your timeline has reached checkout as well! To review your plans and who's covered, simply click View or Change next to each benefits type. You can also download, email, and print your selections for your own record. Congratulations, you have completed your enrollment!

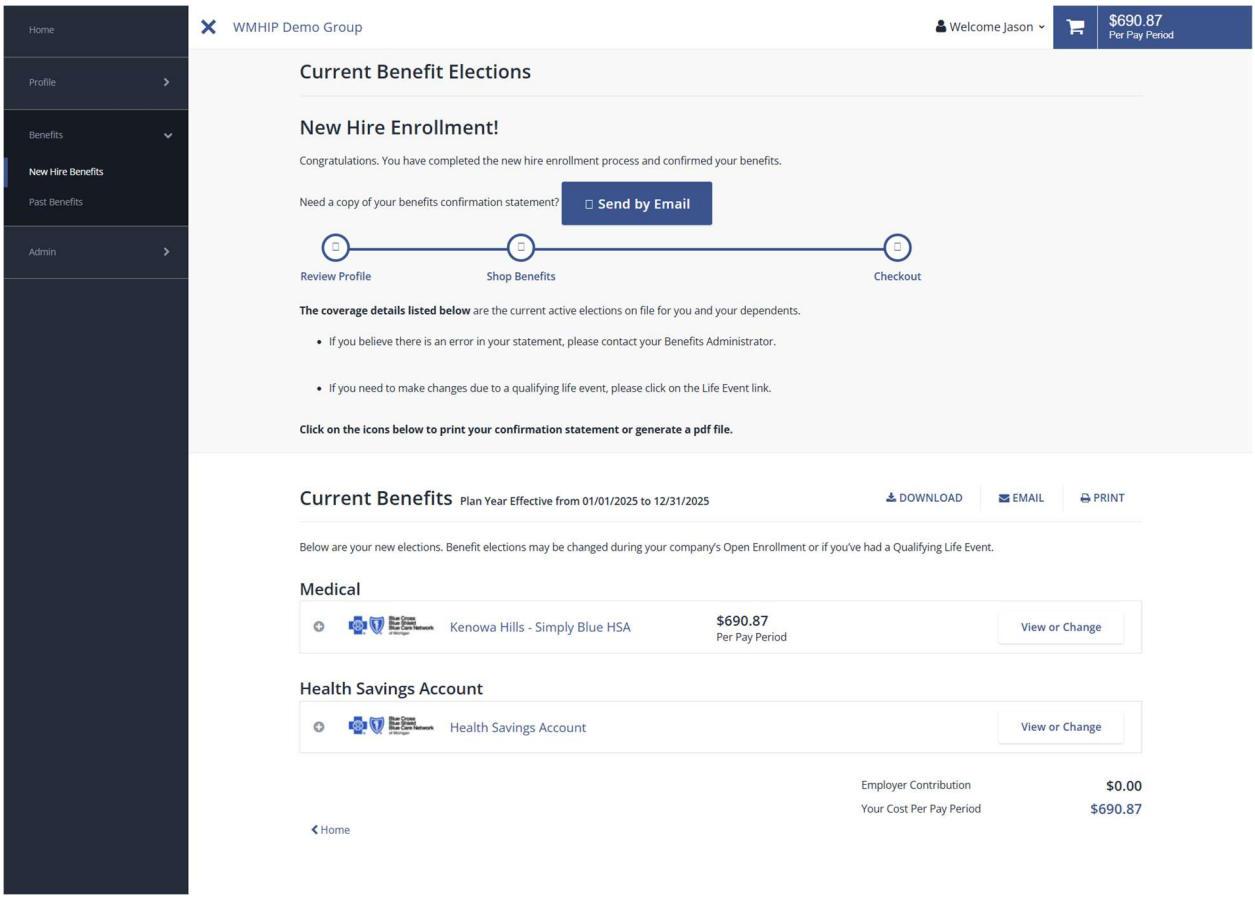

Figure 11 Confirmation Page

To make any changes to your elections (within your enrollment window):

- Click View or Change (i.e. Medical, Dental, etc.)
- Make corrections
- Click Update Cart (which will bring you back to the Your Summary Page)
- Click Review and Checkout

Adding a Life Event

Some changes in your personal life may qualify you to change your benefit elections. A list of Life Event changes can be found by reporting a life event on the main page, or you can call your HR Department with any questions.

To report a Status Change on the new Enrollment page, follow the steps below:

1. For an employee logging in, from the homepage they will select Update My Benefits. For an HR admin, on employee profile, click Life Events/Create a new life event

2. On the next page you can select the qualifying event from the list. Input the event date information and click Continue.

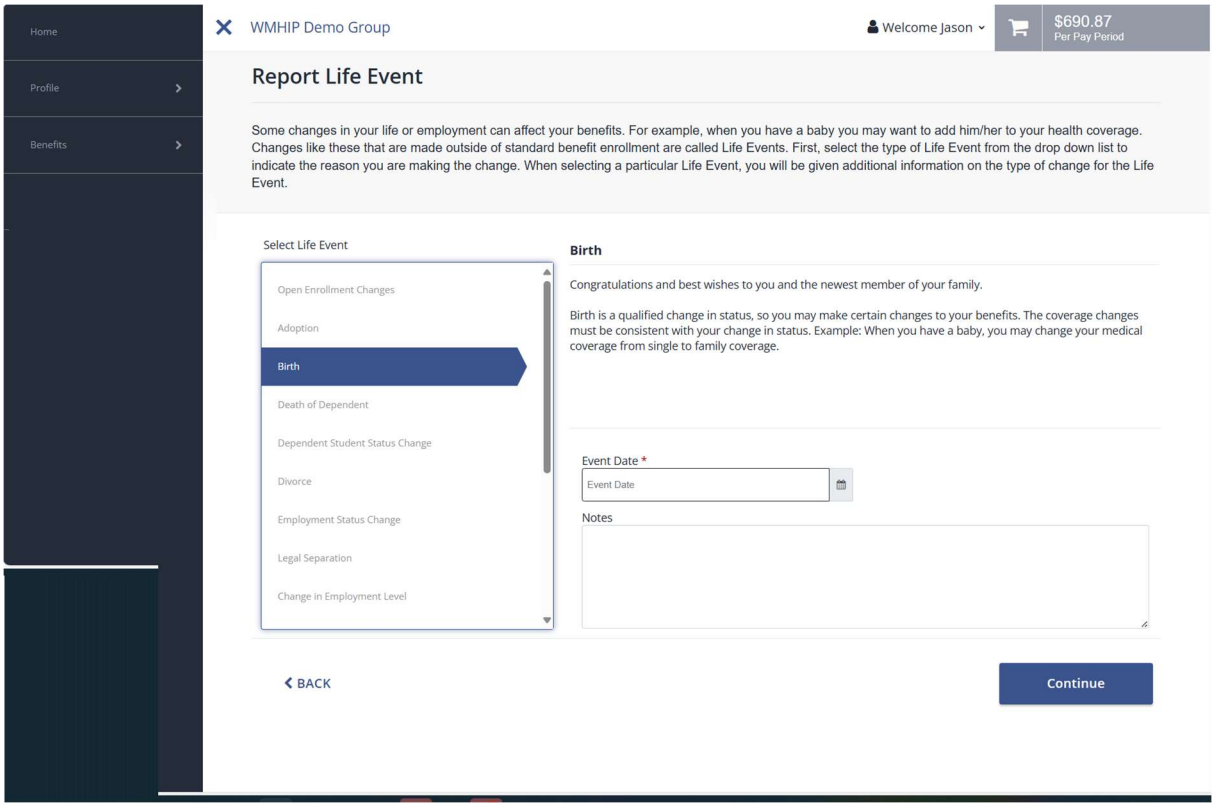

Figure 12 Report Life Event

3. Add/Remove Dependents (if necessary)
4. Update Benefits as necessary
5. Review Selection and Checkout

Wrapping up Your Enrollment

The Enrollment process is designed to be smooth and effortless. Always remember to click Checkout once you finish enrolling or updating your benefits. If you have any issues, please reach out to your HR department and they will be able to assist you.