

## Enrolling for Benefits

**Plan Source** is the employee self-service, online portal for employees to enroll in all benefit plans. Once logged in, you will be able to see benefits offered to you and compare cost.

**Current Employees:** Mandatory Annual Open Enrollment is October 1 through October 31. Coverage elected during Annual Open Enrollment becomes effective on January 1.

**New Hires:** All new employees eligible for benefits will have 60 days from date of hire to complete the enrollment process.

**Log on to** <https://benefits.plansource.com>. Username is your first initial of your first name, first six letters of your last name, and last four of social. (Ex. jsmith0410). At the start of Open Enrollment, password will be reset to your date of birth in the YYYYMMDD format. For existing employees, select **"Enroll - Annual"**; new hires, select **"Enroll - New Hire."**

### **Step 1: Review the information and update your personal data.**

The \* indicates a required field. Remember to press "Continue" at the bottom of the page to proceed through the enrollment and only use the gray Plan Source "Back" button. Do NOT use the back button on your internet browser or your changes will be lost.

**Step 2: If you need to add a dependent to your coverage, choose "Add Dependent" on the Update Dependent screen.** You should verify/add all dependents, even if you are not enrolling them. If your desired election does not appear, or your dependent is not showing, you must go back to this section and add them.

**Step 3: Continue through each screen including benefit offering, choosing your desired election** under the appropriate plan, or declining the benefit entirely. If you elect coverage with dependents, check the box next to each dependent you would like to enroll.

**Step 4: Upload the required documents if you added any dependents to your coverage.**

**Step 5: Once you have completed each benefit election, the Confirmation page will appear.** Review for accuracy and choose "Confirm" at the bottom of the page. Your benefit election will not be complete until you hit the "Confirm" button.

## Life Events:

**You may add, drop, or change coverage or dependent coverage outside of Open Enrollment ONLY if you experience a qualifying life event.**

Qualifying life events include: marriage, divorce, birth, adoption, or a gain/loss of coverage by your spouse or other dependent. It is required that you submit your qualifying life event through Plan Source and all supporting documents to your HR department within 30 calendar days of any change in status.

Log on to Plan Source, select "Make a Change to My Benefits." You will then be asked for the type of life event and the date of the event. The date of the event should be the date your coverage is to change. You must upload all documents in order for your event to be approved.

PLEASE NOTE: It may take up to 2 weeks for life events to be processed.