## **Enrollment Instructions**

To enroll in benefits, go to: <u>https://benefits.plansource.com/</u>



## Enter your Username and Password.

**Username**: Your username is the first initial of your first name, the first six letters of your last name, and the last four digits of your SSN.

For example if your name is Taylor Williams and the last four digits of your SSN are 1234, your username would be twillia1234.

Password: Your initial password is your birthdate in the following format, YYYYMMDD.

For example if your birthdate is June 4, 1979, your password would be 19790604. The first time you log in you will be promoted to change your password.

Homepage: Once you log in on the homepage, click "Get Started" to begin.

**Profile**: You will be asked to review and update your profile and ensure that all information listed about yourself and your family members is correct.

**Shop for Benefits**: You can now begin shopping for benefits! Educational material about the specific plan type is available at the top of the page.

**Select Plan**: To select a plan, indicate which family members are covered by clicking "edit family covered" and select each family member you'd like to be on the plan.

Click "Update Cart" to choose a plan.

**Shopping Cart**: The shopping cart displays a running total of your combined benefits costs and shows your progress. You will need to select or decline a plan in each benefit type before you can check out.

**Checkout**: To finalize your choices, click "Review and Checkout." You must complete the checkout process in order to be enrolled in benefits.