



# Employee Experience

Enrollment Guide

*Version 3.2, 10/5/2017*

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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. First initial of your First Name
  - b. First six characters of your Last Name
  - c. Last four (4) digits of your SSN

Example: John Employee, whose SSN is 000-00-1234, would have a login of JEMPLOY1234.

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.

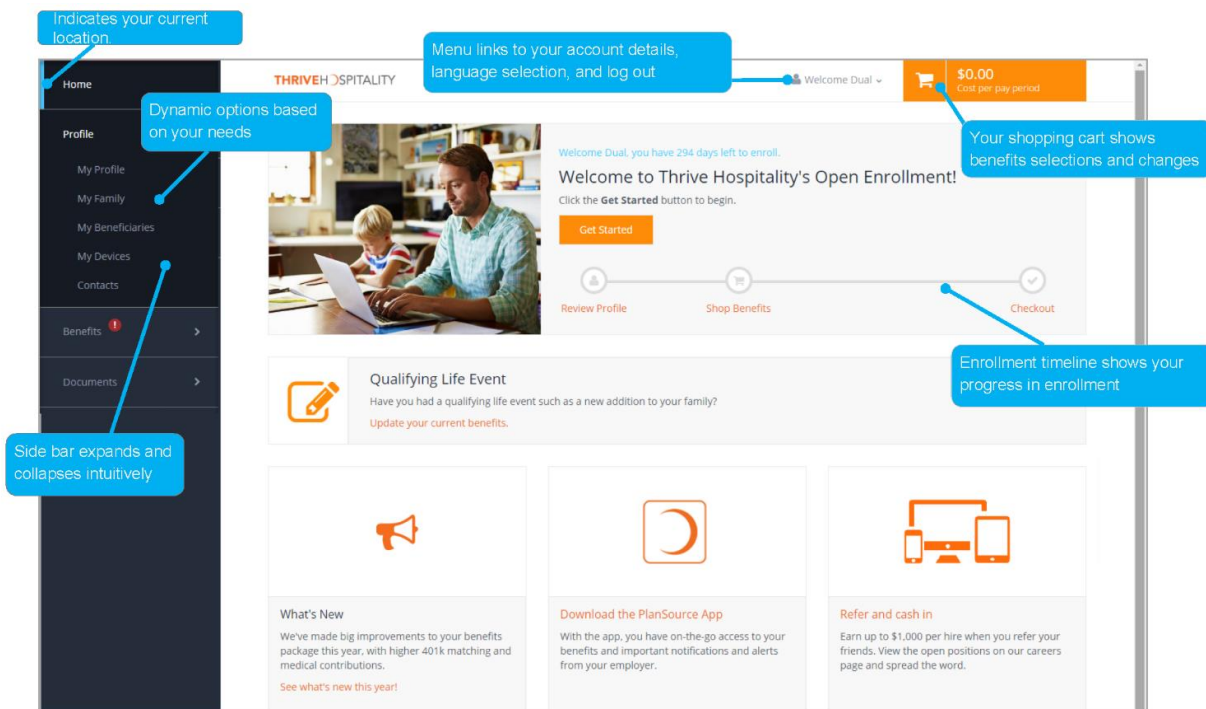


Figure 1 Welcome Screen

## 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](https://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".

Home

PLANSOURCE

Welcome Kevin

\$0.00 Per Pay Period

### Verify your Personal Information and make changes if needed

This information is used for:

- reporting to the benefit carriers
- to issue your ID cards and process your claims
- to process your payroll, taxes, etc.

If any of the information is incorrect and you are unable to change it on this page, please contact your Human Resources representative.

#### Basic Information

First Name * Kevin	Middle Name	Last Name * Abert
User Name kabert5115	SSN * XXX-XX-5115	

#### Contact Information

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:

Home

THRIVE HOSPITALITY

Welcome Marianne

\$0.00 Per Pay Period

### Manage your family members

View, add, edit or remove dependents here. If you add a new family member, the family member won't be added to your benefits automatically. You still need to add the family member to any applicable benefits.

#### Current Family Members

<p>Alex Teddy Spouse Born 05/05/1980 View Details Remove Edit</p>	<p>+ Add Family Member</p>
---	----------------------------

Back

Next: Shop for Benefits

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.

THRIVEHOSPITALITY

Welcome Marianne

\$0.00  
Per Pay Period

## Your Benefits

Review Profile   Shop Benefits   Checkout

To make a change, click on the benefit name. To complete your enrollment, click **Review and Checkout** at the bottom of the page.

### New Enrollment

Coverage effective from 08/01/2017 to 07/31/2018

**Medical**

No Plan Selected   Shop Plans

**Dental**

No Plan Selected   Shop Plans

**Vision**

No Plan Selected   Shop Plans

**Voluntary Employee Life**

No Plan Selected   Shop Plans

Per Pay Period: \$0.00

Review and Checkout

*You must select or decline all coverages before moving on*

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.

The screenshot displays the enrollment process on the Plansource website. At the top, the 'Current Benefit Elections' section includes a progress bar with 'Review Profile' and 'Shop Benefits' steps. Below this, 'Current Benefits' are listed with coverage effective from 01/01/2017 to 12/31/2017. The 'Medical' and 'Dental' sections show 'No Plan Selected'. The 'Vision' section is partially visible. A 'View Cart' overlay is open on the right, showing a total of \$0.00 per pay period and a list of selected benefits: Medical, Dental, Vision, Basic Employee Life/AD&D: Basic Life & AD&D, Voluntary Employee Life, Basic Long Term Disability: LTD, Health Care Reimbursement Account, and Dependent Care Reimbursement Account. A progress bar indicates '2 of 8 Benefits Complete' and a 'Review & Checkout' button is at the bottom of the cart.

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.



Home

Profile

Benefits **New Enrollment**  
Enrollment Incomplete

Documents

THRIVEHOSPITALITY

Welcome Marianne

\$0.00  
Per Pay Period

## Your Benefits

Review Profile Shop Benefits Checkout

To make a change, click on the benefit name. To complete your enrollment, click **Review and Checkout** at the bottom of the page.

### New Enrollment

Coverage effective from 08/01/2017 to 07/31/2018

**Medical**

No Plan Selected Shop Plans

**Dental**

No Plan Selected Shop Plans

**Vision**

No Plan Selected Shop Plans

**Voluntary Employee Life**

No Plan Selected Shop Plans

Per Pay Period: \$0.00

Review and Checkout

*You must select or decline all coverages before moving on*

**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.

The screenshot displays the 'Shop for Medical' interface. At the top, the user is identified as 'Welcome Marianne' with a shopping cart icon showing '\$0.00 Per Pay Period'. The left navigation menu includes 'Home', 'Profile', 'Benefits', 'New Enrollment' (with a red notification icon and 'Enrollment Incomplete' text), and 'Documents'. The main content area features a video titled 'Understanding Medical Plans' with a 'View More' button. Below this is the 'Family Covered' section, currently showing 'Yourself' and an 'Edit Family Covered' link. A filter bar at the top of the plan selection area shows 'HDHP \$5000 Deductible', 'HDHP Select 70 - \$10,000 Deductible', and 'Open Access Value \$1500', with a 'Compare (3)' button. The 'Select a Plan' section contains three Aetna plan cards:

Plan Type	Deductible	Cost per pay period
HDHP \$5000 Deductible	\$5,000	\$10.00
HDHP Select 70 - \$10,000 Deductible	\$10,000	\$20.00
Open Access Value \$1500	\$1,500	\$45.00

Each plan card also displays details for Calendar Year, Coinsurance (80%/20%), and Calendar Normal. Below each card is a 'View Plan' button and a checked 'Compare' checkbox. At the bottom, there is a 'Decline Coverage' option with a \$0.00 cost per pay period.

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, or add, by click Edit Family Covered.
- Click on the benefit you wish to enroll in.

**THRIVE HOSPITALITY** Welcome Marianne \$0.00 Per Pay Period

## Medical: HDHP \$5000 Deductible

< To Available Plans

Family Covered [Edit Family Covered](#)

Yourself, Alex

Coverage Levels

Employee Only	\$10.00 Cost per pay period
Employee + Spouse	\$25.00 Cost per pay period
Employee + Children	\$37.50 Cost per pay period
Employee + Family	\$57.58 Cost per pay period

Plan Details

Description	Network	Out of Network
Calendar Year Deductible (Individual / Family)	\$2,500 / \$5,000	\$5,000 / \$10,000
Coinsurance (Carrier / Employee)	80% / 20%	60% / 40%
Calendar Year Out Of Pocket Maximum (Individual / Family)	None	None
Out Of Pocket Maximum Includes Deductible	\$5,000 / \$10,000	\$10,000 / \$20,000
Lifetime Maximum	Unlimited	Unlimited
Preventive Care Routine Exams	No copay (100% covered)	No copay (100% covered)
Primary Care Office Visit	80% after deductible and Coinsurance	60% after deductible and Coinsurance
Specialist Office Visit	80% after deductible and Coinsurance	60% after deductible and Coinsurance
Inpatient Hospitalization	80% after deductible and Coinsurance	60% after deductible and Coinsurance
Outpatient Surgery	80% after deductible and Coinsurance	60% after deductible and Coinsurance
Diagnostic Laboratory	80% after deductible and Coinsurance	60% after deductible and Coinsurance
Diagnostic X-Ray	80% after deductible and Coinsurance	60% after deductible and Coinsurance
Diagnostic X-Ray for Complex Imaging Services	80% after deductible and Coinsurance	60% after deductible and Coinsurance

**aetna**  
HDHP \$5000 Deductible

**\$25.00**  
Cost per pay period

[Update Cart](#)

[Decline Medical Benefits](#)

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.

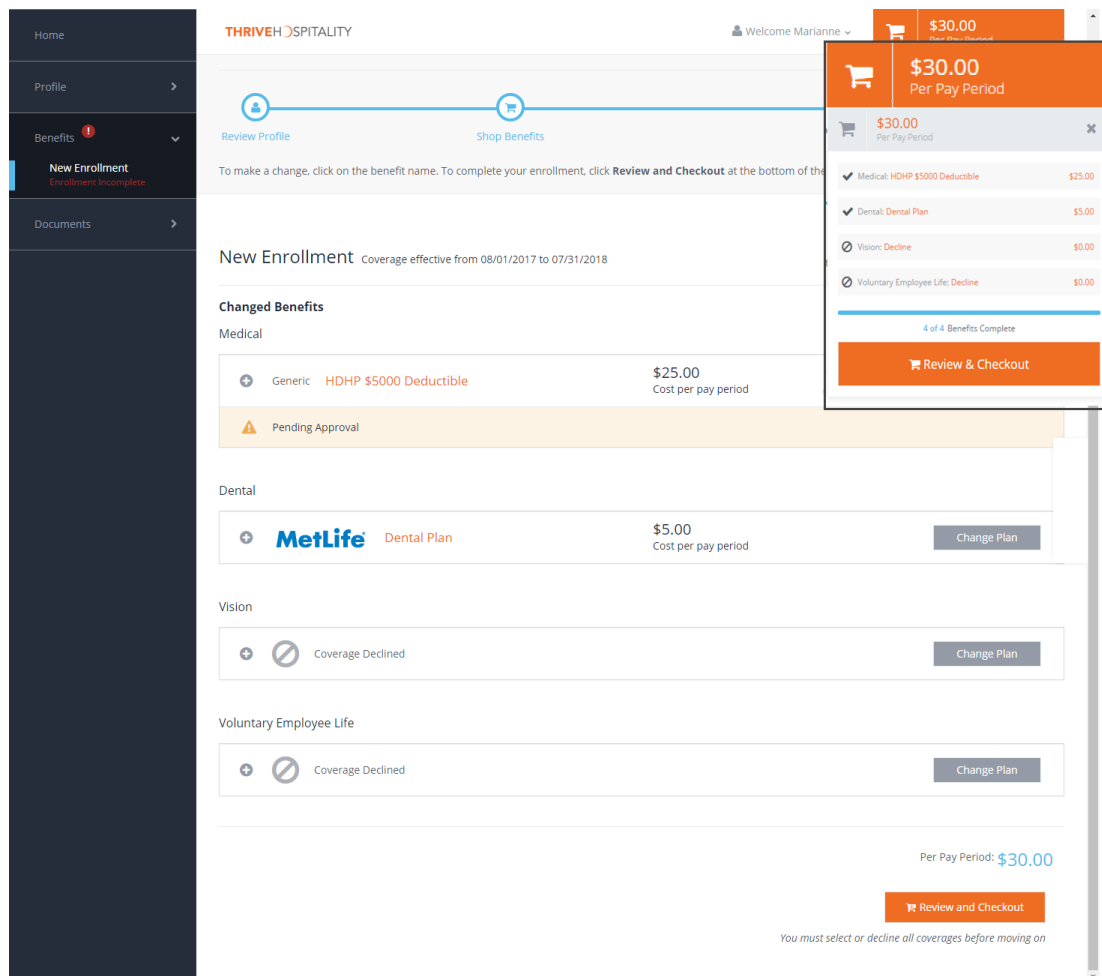


Figure 10 Dashboard Page Progress

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 Plan next to each benefits type. You can also download, email, and print your selections for your own record. Congratulations, you have completed your enrollment!

**THRIVE HOSPITALITY** Welcome Marianne \$30.00 Per Pay Period

Shop for Benefits

## Enrollment Complete!

You have completed the open enrollment process and confirmed your benefits.

Review Profile | Shop Benefits | Checkout

Open enrollment is your opportunity to shop and enroll in benefits for you and your family. While you shop, you can watch short videos that explain each type of benefit and help you make more informed choices. Watch this video to learn more about Open Enrollment.

### Understanding

[View More](#)

**New Enrollment** Coverage effective from 08/01/2017 to 07/31/2018 Download | Email | Print

Below are your new enrollment. Benefit elections may be changed during your company's Open Enrollment or if you've had a Qualifying Life Event.

**Medical**

<input type="checkbox"/>	Generic HDHP \$5000 Deductible	\$25.00 Cost per pay period	<a href="#">View Plan</a>
<input type="checkbox"/>	Pending Approval		

**Dental**

<input type="checkbox"/>	MetLife Dental Plan	\$5.00 Cost per pay period	<a href="#">View Plan</a>
--------------------------	---------------------	-------------------------------	---------------------------

**Vision**

<input type="checkbox"/>	Coverage Declined		<a href="#">View Plan</a>
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Figure 11 Confirmation Page

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

- Click Continue Enrollment, or View Confirmation (i.e. Medical, Dental, etc.)
- Make corrections
- Click Save (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. From your homepage select Update My Benefits

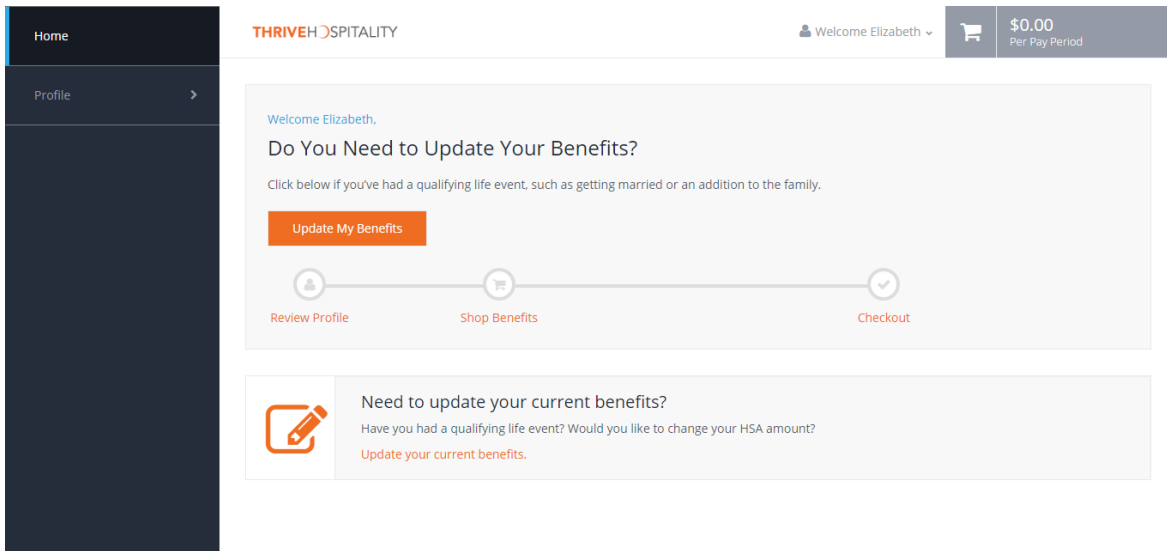


Figure 12 Creating a Life Event

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

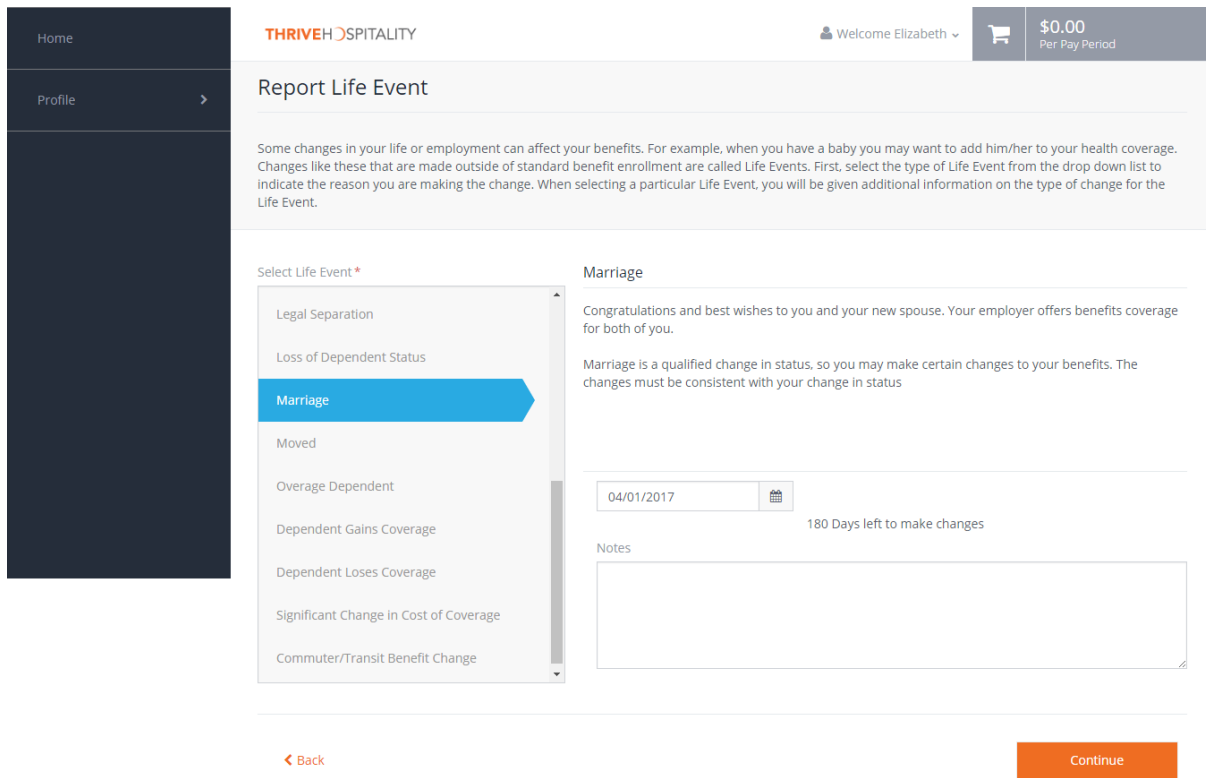


Figure 13 Report Life Event

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

### *Certify Your Dependents*

If you are making a status change at any time throughout the year you could be required to email, fax, or mail supporting documentation to your HR Department for your status change request to be approved. If your status change requires further documentation, you must send that documentation within 31 days of the event or your request will automatically be denied. Please refer to you HR representative for more information on life change event documentation.

## Viewing Your Information at Any Time

At any time throughout the year you can login to your account using your Username and your password. If you do not remember your password contact your Benefits Administrator to have your Password reset. Click Benefits in

the left hand navigation menu. Read through this page and verify that all information is correct; if there are errors, contact your HR representative for corrections.

## Document Library

If your employer has provided any documentation regarding your benefits, they can be found in the left-hand navigation under the Documents section, and in the Benefit Documents section, as pictured below:

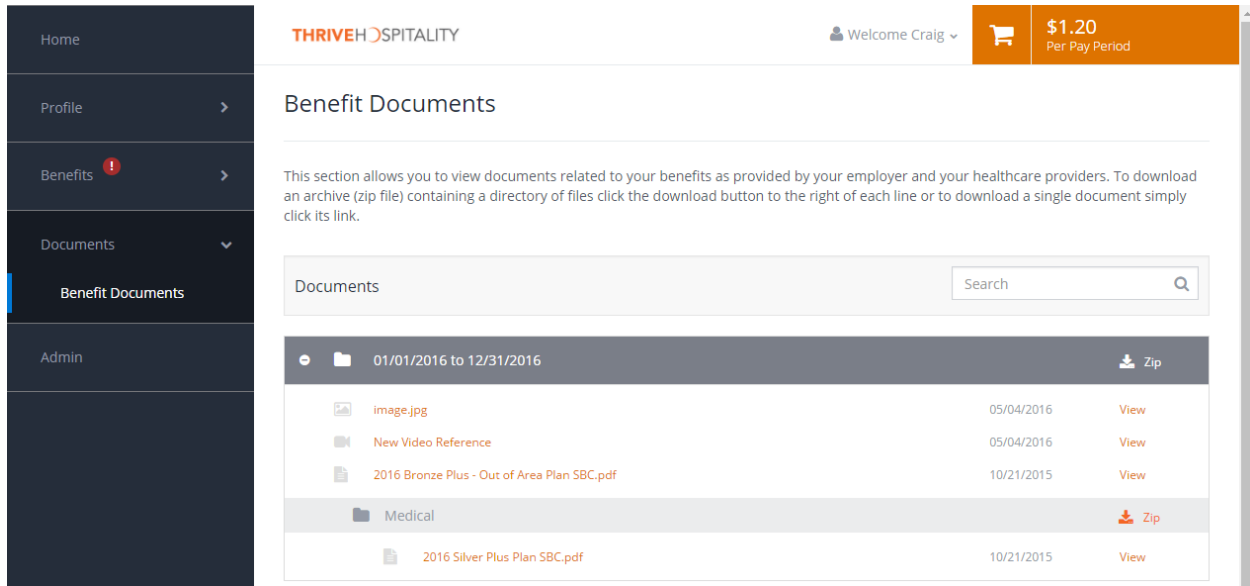


Figure 14 Document Library

The documents in the Library are broken out by Plan Year and Benefit. Some documents are global document, and are in their own category, available to all employees.

## 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.