PLANSOURCE ®

Employee Experience

Enrollment Guide

Version 3.0, 6/20/2019

Getting Started

We recommend you use Firefox or Google Chrome when logging into PlanSource. Do not use Internet Explorer.

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)
- Marriage certificate or 1040 tax form for your spouse or birth certificate(s) for your dependent children that you are enrolling in the Medical, Dental or Vision plans. This is not required, if they are currently enrolled and have already been verified in PlanSource.

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.

PLEASE NOTE: If you worked at another ACSHP district previously or your prior employer utilized PlanSource, your Username will be slightly different.

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 Treasurer's Office.

Welcome Screen

From this screen you will be able to begin the subscriber's enrollment, make changes to your benefits, see the 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.

Overview

At the top of the screen you'll see how many days you have left to enroll, whether you're updating a new hire or are 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

Updating Subscriber Information

If you are in Open Enrollment - After you select "Get Started", you will be taken through a series of steps in order to update your personal information and the dependents information.

If you are in your new hire window – you will select New Hire Benefits on the left hand side, then you will be taken through a series of steps in order to update your personal information and the dependents information.

New Hire
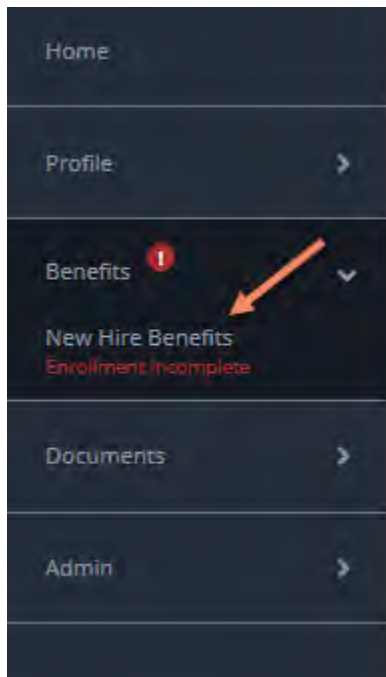
Open Enrollment

Welcome AllenElida7,

Shop and Enroll in Benefits

Let's start with your profile and see if anything has changed since last year.

Get Started

Annual Enrollment

The Annual enrollment period is your opportunity to make changes to your benefits for the upcoming plan year.   To begin, please click on the "**Enroll - Annual**" button on the left.

Review Profile   Shop Benefits   Checkout

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 Treasurer's Office 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".

Adding Dependents

After you review the 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:
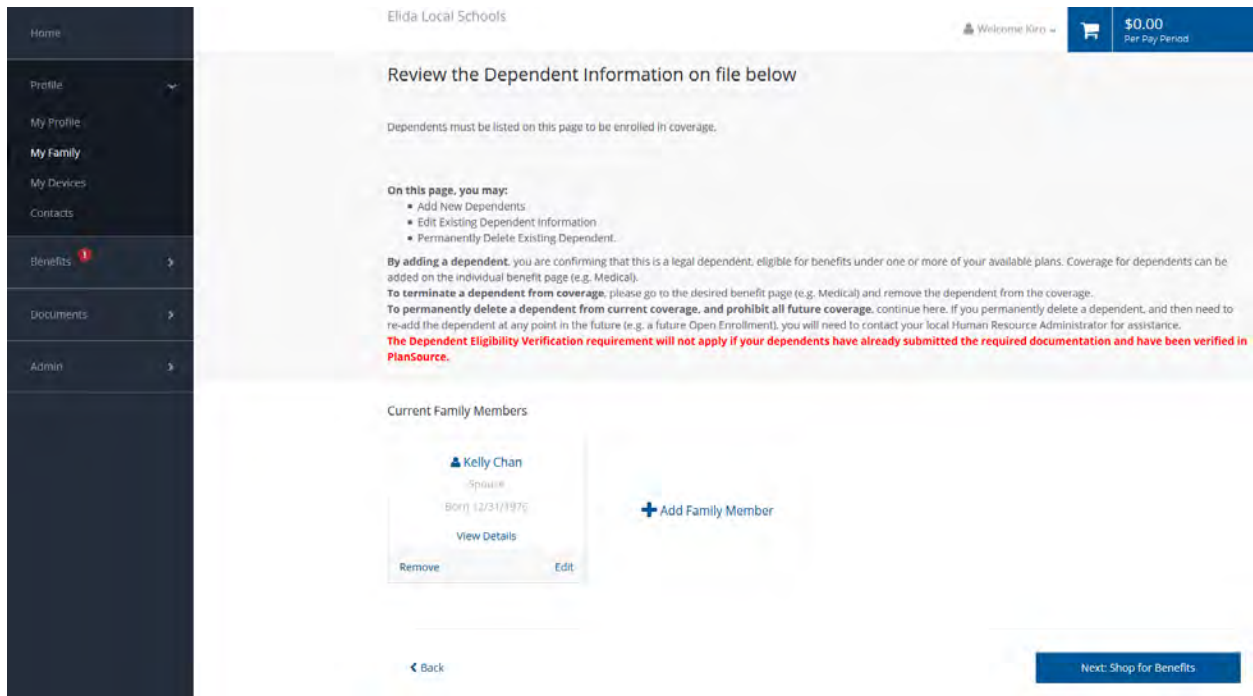
1. Click the "Add Family Member" box. This will open a new page

2. On the new page, enter the dependent information as shown below.
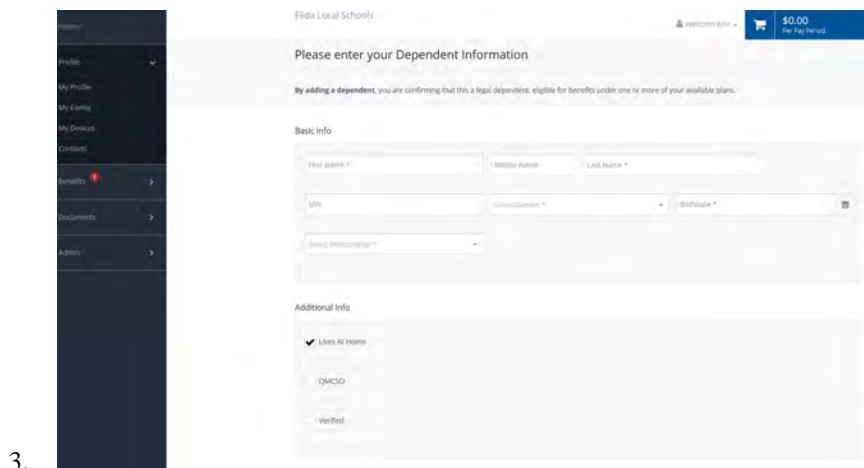
3.

4. Select "Save."

Once you have saved the dependent/s, you will be sent back to the Manage your family member 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 the profile information, and added dependents. Now you're looking at the 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. This will be updated as you go.
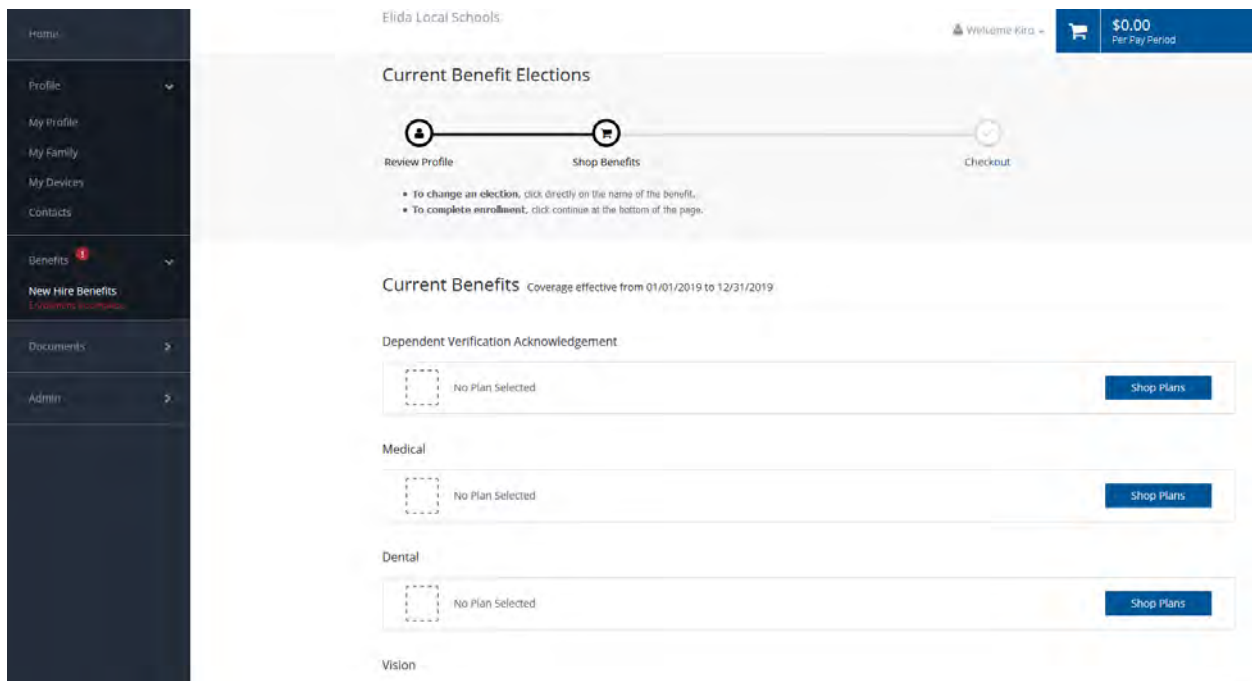
This figure (the dollar amount in your cart) will automatically update as you make each benefit plan selection, and will keep a current amount of your per pay period costs (based on your employer pay period information). If you expand your cart you will see your benefit options and selections.

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.

www.plansource.com

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.

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Electing a Plan

All the plans available to you will be listed on the Benefits Landing 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 clicking "Edit Family Covered." Click on the benefit you wish to enroll in.

-

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 Benefits Landing page 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.

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 receive your purchases!

Dependent Verification Acknowledgement

These instructions apply to Life Events, New Hire Events or Open Enrollment Events. If you have a dependent listed in PlanSource, the Dependent Verification Acknowledgement Agreement will generate. This Agreement explains the dependent eligibility for the Medical, Dental and Vision benefits and also lists the required documentation to confirm dependent eligibility. Note, this requirement will not apply if dependents have already submitted the required documentation (i.e., marriage certificate or 1040 tax form or birth certificates) and have been verified in PlanSource. In addition, it also explains the Spousal COB Requirement.   When conducting the Dependent Audit, PlanSource's first step will be to check to see if a dependent has already been verified. If so, they will automatically approve the request.

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                                          Welcome First ˅ 🛒 **$135.51** Per Pay Period

Dependent Verification Acknowledgement

This requirement will not apply if your dependents have already submitted the required documentation and have been verified in PlanSource.
Make sure you check the Document Library. You can upload the required documentation through PlanSource.
Dependent Eligibility Verification
Dependent Eligibility Verification requires all employees who have dependents enrolled in the ACSHP group plans to provide proper documentation to verify the dependent's eligibility for coverage under the plans.
An Eligible Dependent is:
  • the Card Holder's spouse;

  • the Card Holder or spouse's unmarried children, married children (applies to Medical only), stepchildren, children placed for adoption, legally adopted children, children

⊕ View More

Dependent Verification Acknowledgement: Dependent Verification Acknowledgement

‹ To Benefits

Select Coverage Level

I Understand

Current Benefit   Coverage effective from 05/30/2019 to 12/31/2019

⊕ Dependent Verification Acknowledgement	$0.00 Per Pay Period

Dependent Verification Acknowledgement

$0.00
Per Pay Period

🛒 Update Cart

PLANSOURCE

Spousal COB Certification Acknowledgement

The Spousal COB Certification Acknowledgement page will generate if a spouse is listed as a dependent and you are enrolled for family Medical/Rx coverage. This Agreement explains the Spousal COB requirement for spouses who are eligible for coverage from their employer or retirement plan. In addition, you can print a blank Spousal COB certification form for your spouse's employer or retirement plan to complete if you are enrolled with primary coverage by clicking on the Spousal COB Document button. You will need to select Update Cart button in order to move onto the next section. You will be required to answer a few COB Survey questions before proceeding to your next benefit section.

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Spousal COB Certification Acknowledgement

If an employee's spouse is eligible to participate in their employer's group health insurance and prescription drug insurance, the spouse of the employee MUST enroll with at least single coverage in said employer's sponsored group insurance coverage(s). If a spouse is self-employed and offers a group health and/or prescription drug plan to his/her employees, such self-employed spouse MUST also enroll with at least single coverage in such employer-sponsored group insurance.

This requirement does not apply to any spouse who must pay more than 50% of the ~~spouse's employers' monthly single premium. A certification form is required annually for~~

Additional Content (1):

📄 Spousal COB Certification Document

⊕ View More

Spousal COB Certification Acknowledgement: Spousal COB Certification Acknowlegdment

‹ To Benefits

Family Covered   ✏ Edit Family Covered

Yourself, Kelly

Current Benefit   Coverage effective from 06/01/2019 to 12/31/2019

⊕   Spousal COB Certification Acknowlegdment   **$0.00** Per Pay Period

Spousal COB Certification Acknowlegdment

$0.00
Per Pay Period

🛒 Update Cart

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!
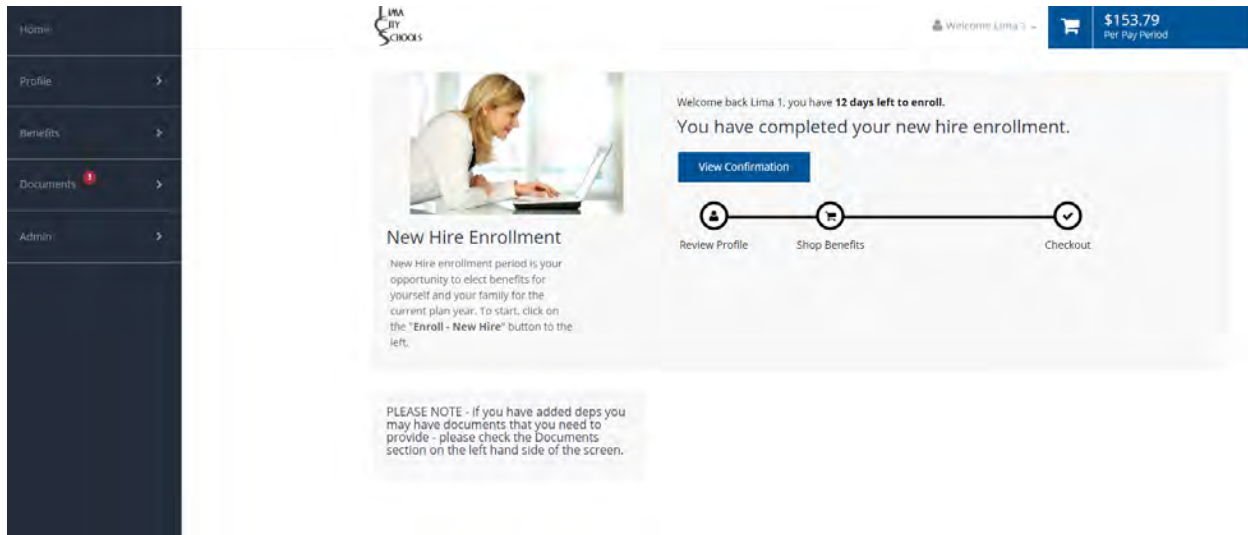
NOTE, If you enrolled a dependent in the Medical/Rx, Dental or Vision coverage or acknowledged the Spousal COB Agreement above, you will need to click on the Documents tab located on the left hand side of the screen and follow the instructions on the next page.

Uploading Documents

This will walk you through how to upload document requests in the system.
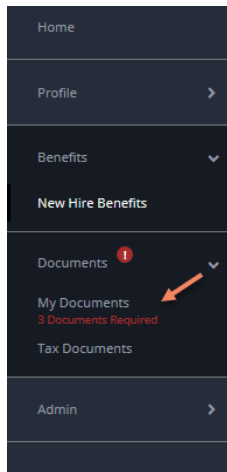
In this section you must either upload your documentation or provide a response that you will provide it later. If you have previously provided a marriage certificate/1040 tax form or birth certificate for your dependent(s) listed and it has been verified in Plansource, please select, "I WILL SUPPLY THE DOCUMENT LATER". You will not be required to provide this information a second time.

Please be aware that if you have a document request for the Spousal COB, you MUST have your spouse's employer or retirement system complete the form if you enrolled your spouse with primary coverage under the Medical/Rx plan. However, you will not be required to complete the Spousal COB form if your spouse is covered under the Medical/Rx plan with secondary coverage. If you are not sure whether or not you should complete this form, just select "I WILL SUPPLY THE DOCUMENT LATER".   The PlanSource team will evaluate the answers to your COB questions and send you a form if it is required.

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Welcome Kiro ▾   🛒   **$129.20**
Per Pay Period

My Documents

The following documents have been requested from you. Please be aware that acceptance of enrollment in any number of benefits may rely on your submitting the requested documents in a timely fashion.

If you have previously provided a marriage license/1040 tax form or birth certificate for your dependent(s) listed below and it has been verified in Plansource, please select, "I WILL SUPPLY THE DOCUMENT LATER". You will not be required to provide this information a second time.

If an employee's spouse is eligible to participate in their employer's group health insurance and prescription drug insurance, the spouse of the employee MUST enroll with at least single coverage in said employer's sponsored group insurance coverage(s). If a spouse is self-employed and offers a group health and/or prescription drug plan to his/her employees, such self-employed spouse MUST also enroll with at least single coverage in such employer-sponsored group insurance.

This requirement does not apply to any spouse who must pay more than 50% of the spouse's employers' monthly single premium. A certification form is required annually for

⊕ View More

Required Documents

Select Document Type:	Select Document Type:	**Spousal COB**
Marriage Certificate ▾	Birth Certificate ▾	Kelly Chan
Kelly Chan	dep verification test	
For Dependent Audit	**For Dependent Audit**	**For Spousal COB**
☁ Drag document here or click to browse	☁ Drag document here or click to browse	☁ Drag document here or click to browse
Other options:	Other options:	Other options:
Select an existing document	Select an existing document	Select an existing document
Cannot provide required document	Cannot provide required document	Cannot provide required document
I will supply the document later	I will supply the document later	I will supply the document later

In each box the dep is listed.
In each box the drop down will show you which documents can be accepted.
In the drag document box, you can upload the needed document.

At the bottom of the box you can indicate on of the following:
Select an existing document – if you are downloading form
Cannot provide required document – if you cannot provide the required document.
I will supply the documents later – if you plan on supplying the required documents later.

Instructions on How to Upload Documents at a Later Date

Log into the system and click on the My Documents link on the left hand side
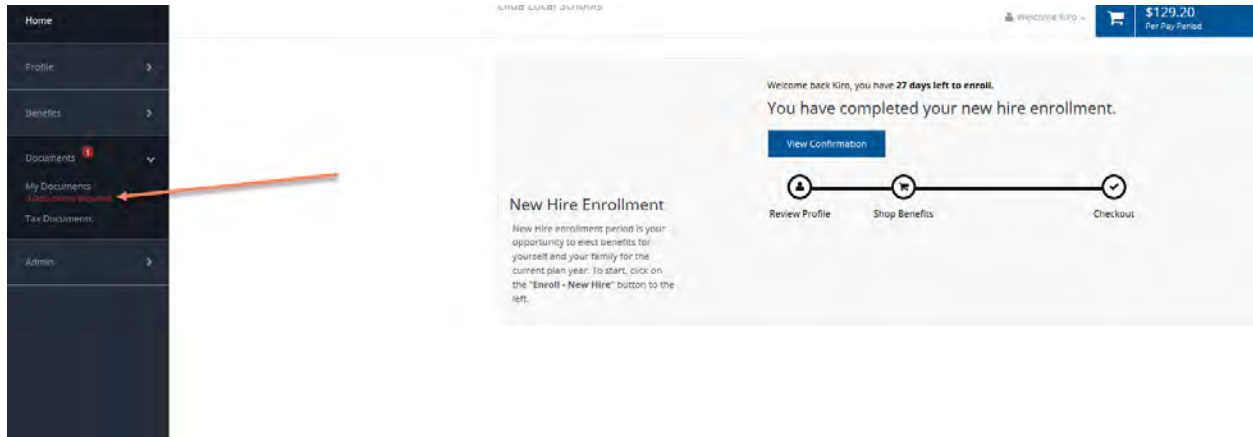
Follow the same instructions on the prior page to upload the documents.

Adding Beneficiaries

From this page you can elect the beneficiaries you want. Simply click on Add Beneficiary and enter in the beneficiary information and the allocation amount (up to 100%) then click Save. If you elected Voluntary Employee Life Insurance, your beneficiaries will automatically be the beneficiaries listed under your Basic Life benefit.

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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

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 Treasurer's Office 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 Treasurer's Office 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 Treasurer's Office 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 Treasurer's Office for corrections.

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.

Creating a Life Event

Navigating through the system when creating a life event is the same as above with the exception of the initial screen.

Once you log on, click on Update your current benefits in the middle of the screen.

From here you will select the type of Life event from the list on the screen:

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Per Pay Period

Report Life Event

Some changes in your life or employment can affect your benefits. For example, when you have a baby you may want to add him/her to your health coverage. Changes like these that are made outside of standard benefit enrollment are called Life Events. First, select the type of Life Event from the drop down list to indicate the reason you are making the change. When selecting a particular Life Event, you will be given additional information on the type of change for the Life Event.

Select Life Event *

Adoption

Birth

Dependent Student Status Change

Domestic partnership creation

Loss of Dependent Status

Marriage

Change in Spousal COB

Medical Eligible Variable Hour Employee

Dependent/Self Loses Coverage (Add Coverage)

‹ Back   Continue

Once you select a Life Event, you will be asked to enter in the effective date for the Life Event. If you do not enter in a date, the system automatically enters in the date you created the Life Event. Therefore, it is important that you remember to enter in the effective date and then click on Continue.

![PLANSOURCE]

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                            Per Pay Period

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Select Life Event *

Adoption
Birth
Dependent Student Status Change
Domestic partnership creation
Loss of Dependent Status
Marriage
Change in Spousal COB
Medical Eligible Variable Hour Employee
Dependent/Self Loses Coverage (Add Coverage)
Change of Address

Birth

Congratulations and best wishes to you and the newest member of your family.

Adoption is a qualified change in status, so you may make certain changes to your benefits. The coverage changes must be consistent with your change in status. Example: When you have a baby, you may change your medical coverage from single to family coverage.

Event Date *
06/01/2019   📅   13 Days left to make changes

Notes

[   ]

◀ Back   Continue

Once you click on Continue you will procced through the system just like the steps outlined above.

Note, the Life event titled, "Change in Spousal COB" should only be used if you are updating your spouse's Medical/Rx COB from primary to secondary or secondary to primary outside of the new hire election or open enrollment period. You will need to go in and answer the Spousal COB questions so there is record of this change. Based on the answers to the Spousal COB questions, you may be required to complete a Spousal COB Certification form. Make sure you indicate the actual effective date of the change.