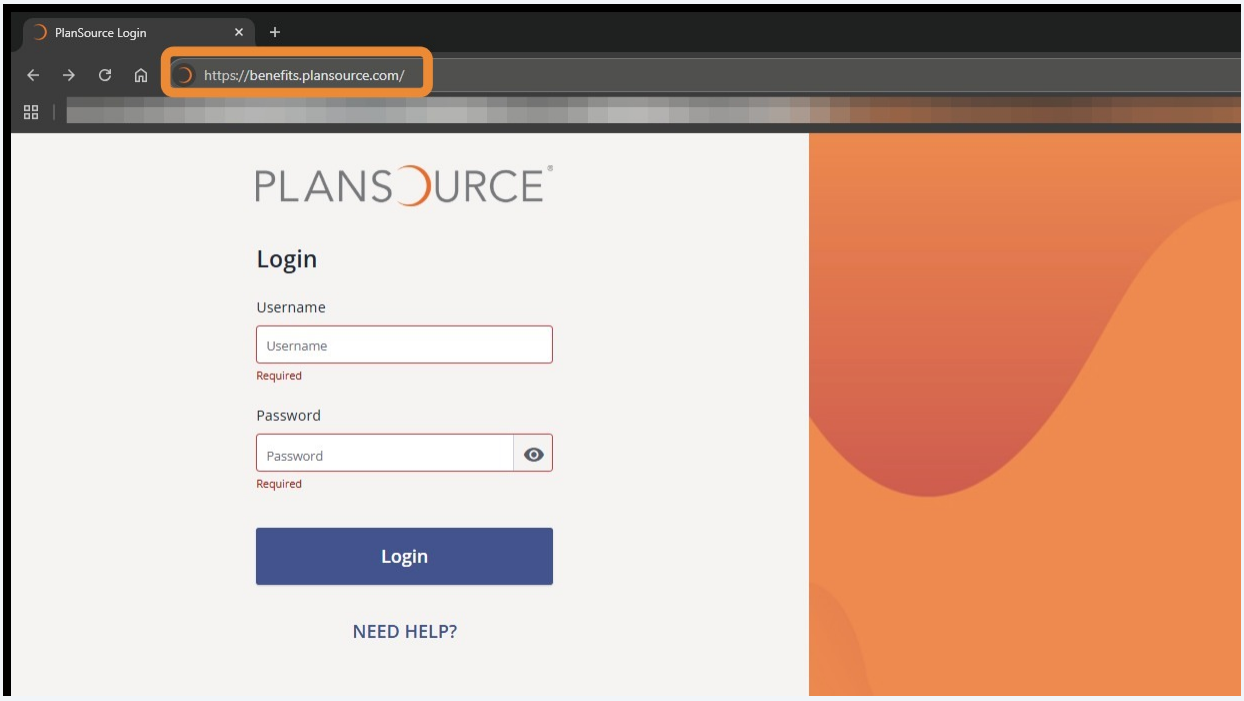
PlanSource Employee Self-Service (ESS) Portal

This guide provides a step-by-step walkthrough for completing Open Enrollment through PlanSource ESS, ensuring you navigate the process smoothly and efficiently. By following these detailed instructions, you can easily manage your benefits.

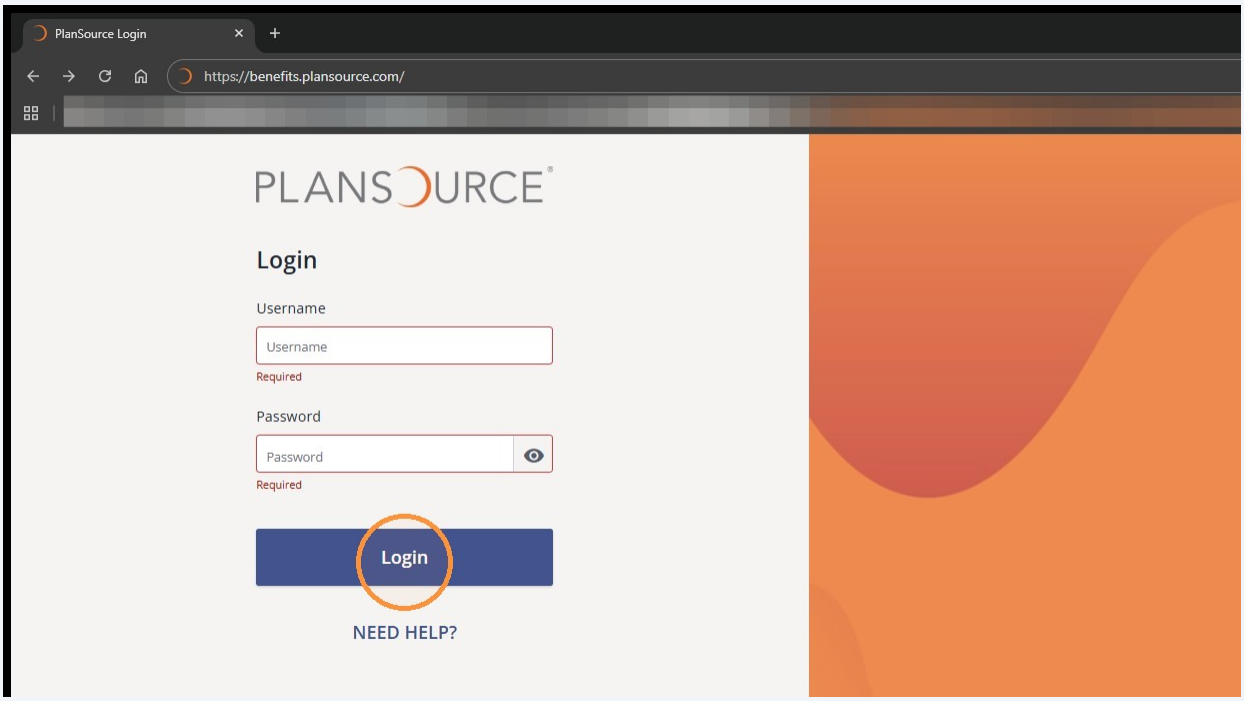
Accessing PlanSource

1 To enroll in benefits, go to: https://benefits.plansource.com/



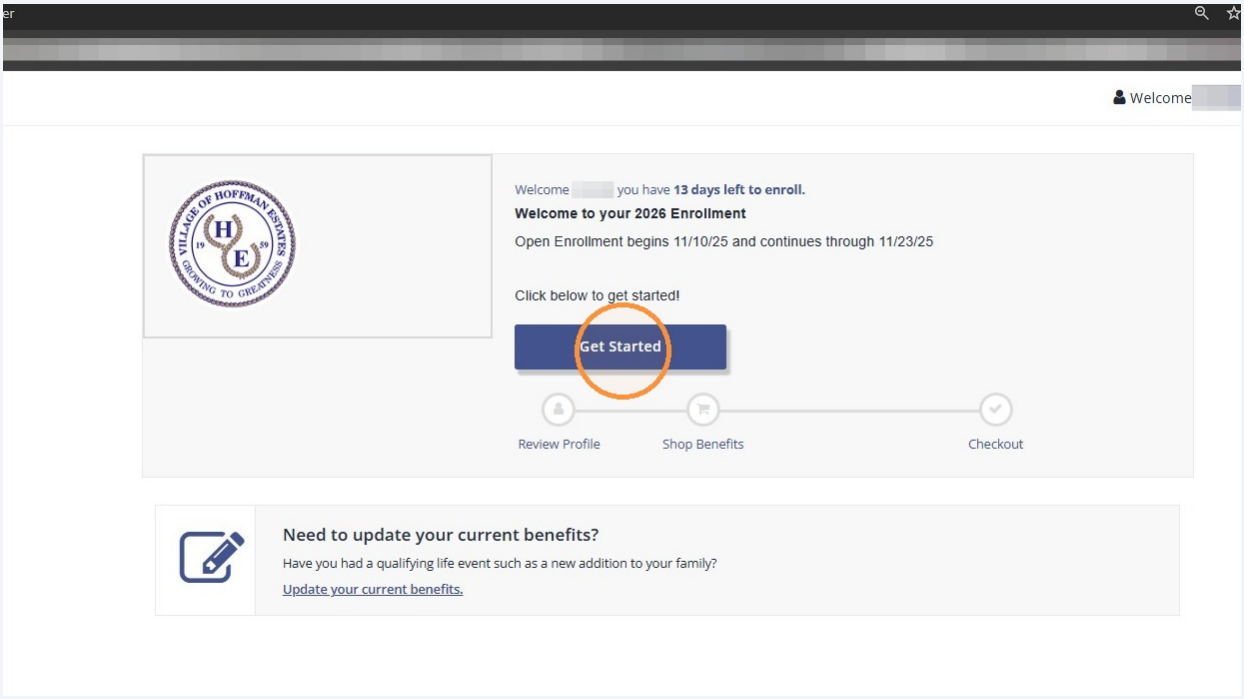
2 On the login page enter your username and password as instructed below and click "Login".

- Your **username** is the first letter of your first name, the first 6 letters of your last name, and your employee ID number (can be found on your paystub).
  - For example, employee Sarah Anderson (employee ID: 10234), would have the following username: sanders10234.
- Your **password** is your date of birth in YYYYMMDD format.
  - For example, with a birth date of January 7, 1968, your password would be 19680107.



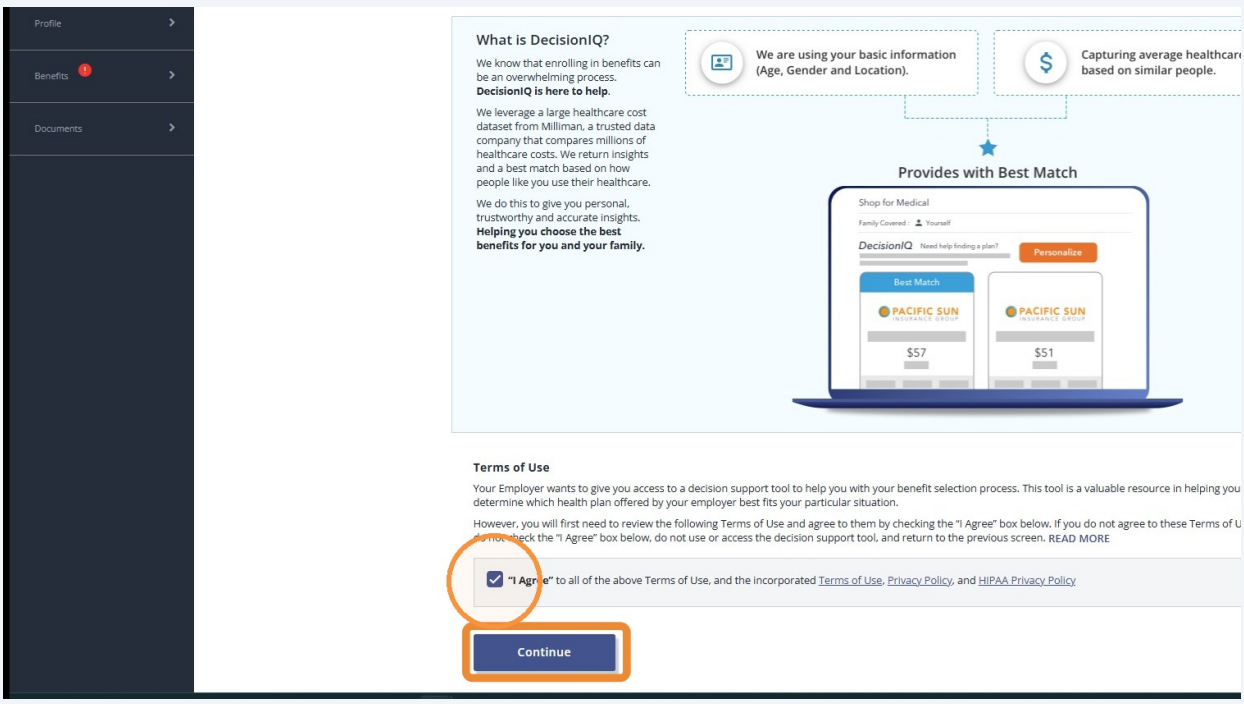
Completing your benefit enrollment

3 On the homepage click "Get Started" to begin.



4 Decision IQ is a support tool that analyzes your personal information and available plans to help you make the best choice for your situation.

Click the “I Agree” in the terms of use box and click continue with your enrollment. Returning users may not have to agree to these Terms of Use again.

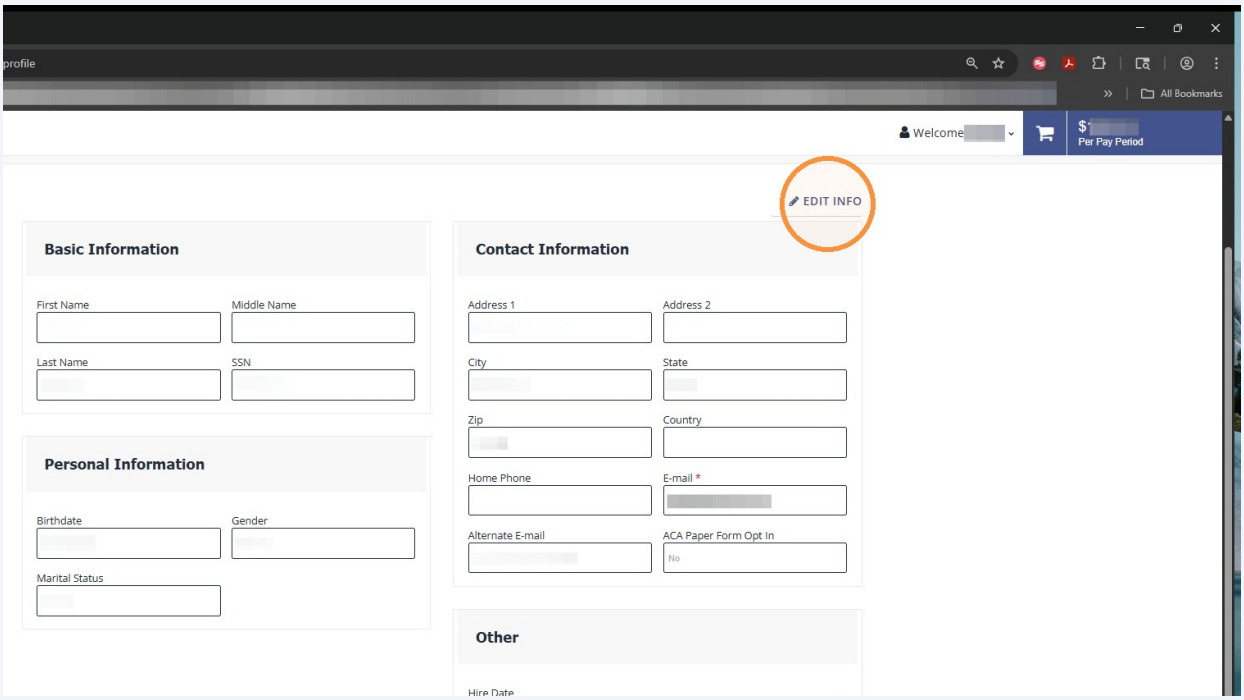


5

Review the information in the personal information screen. This information is used to process your coverages with the insurance carriers and order your ID cards.

Click on the “EDIT INFO” pencil to update your email address(es). To update any other information, please contact HRM at hrm@vohe.org.

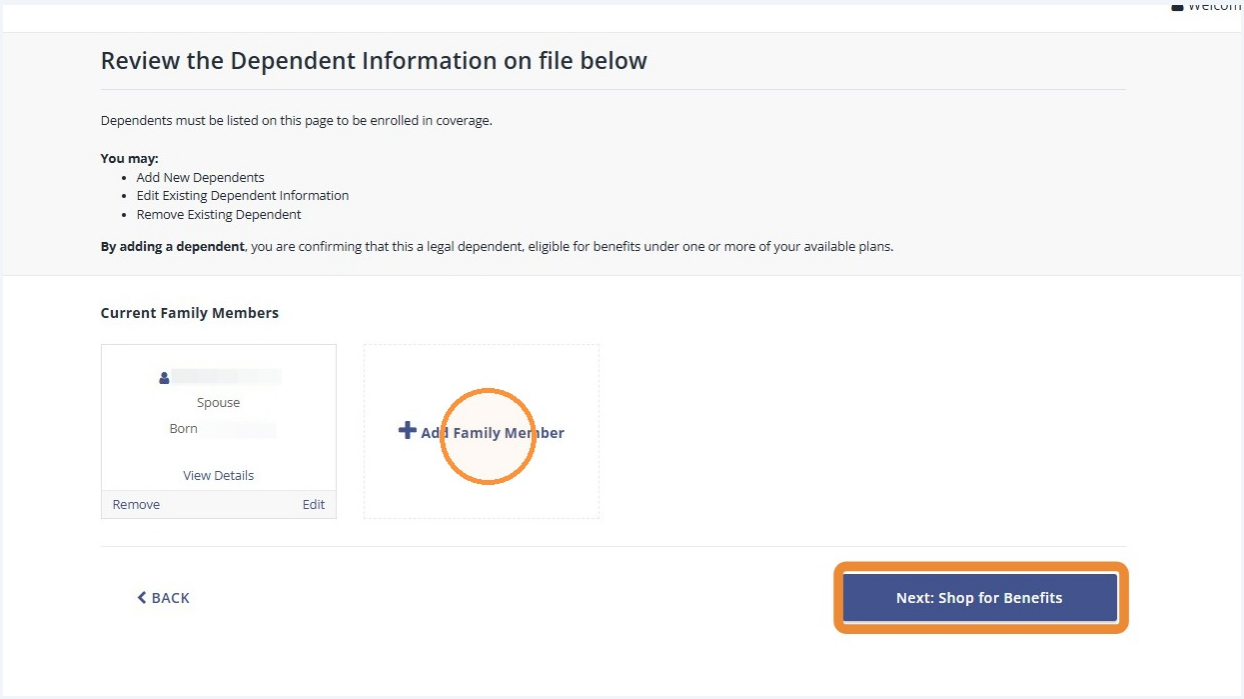
To accept the information and continue your enrollment click “Next: Review My Family".



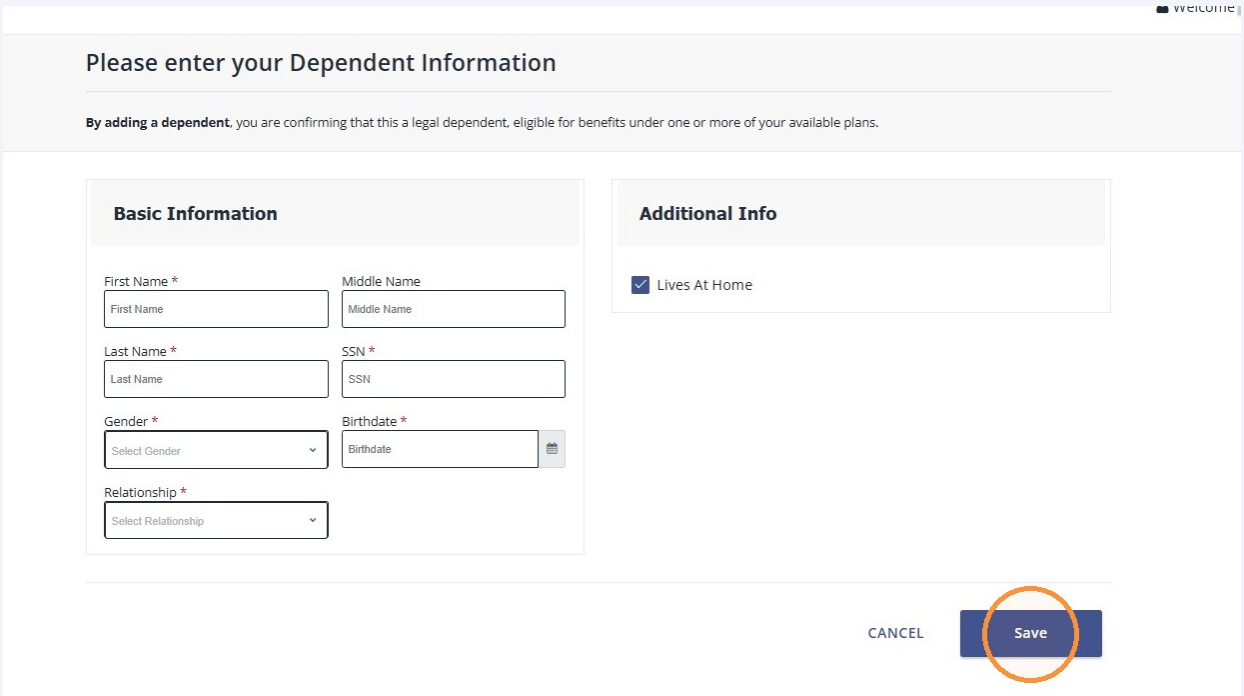
6 If you are not adding any dependents, click “Next: Shop for Benefits”.

To add dependents click the “+Add Family Member”. This will take you to another screen to add your family member’s information.

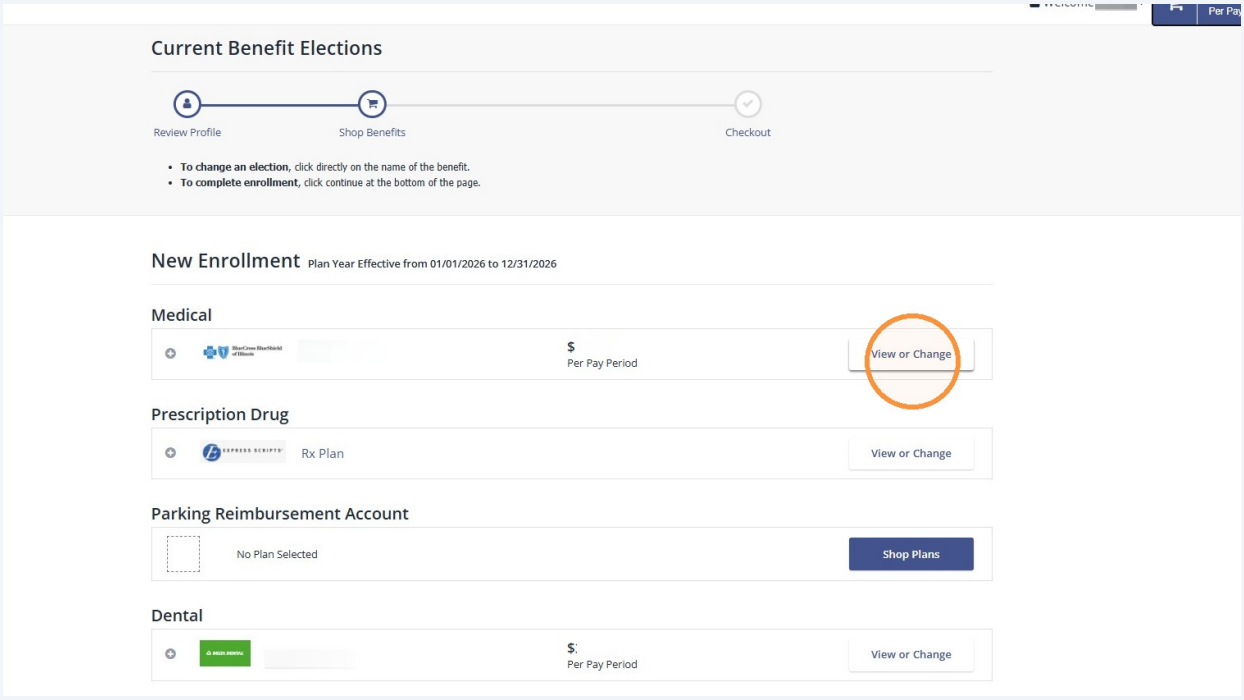
When you are done click “Next: Shop for Benefits”.



7 If adding a dependent, fill in their basic information, then click "Save".

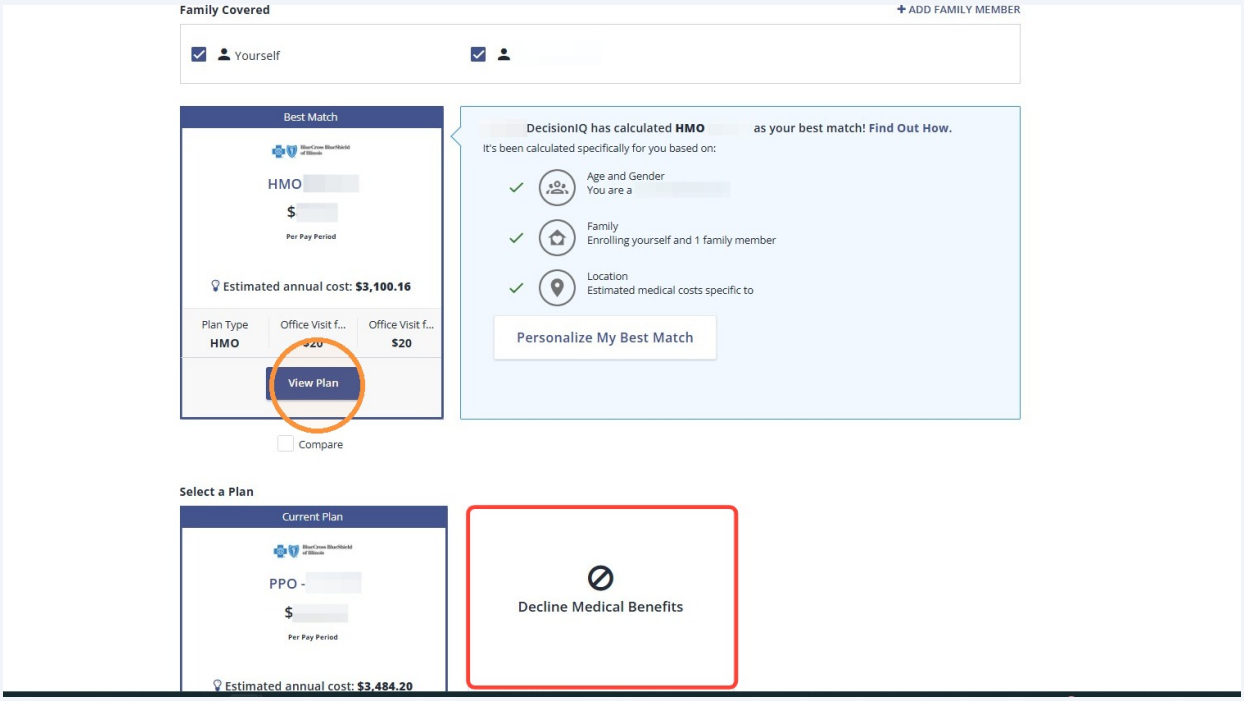


8 Click on the "View or Change" or “Shop Plans” button for each benefit to view your options. You must elect or decline benefits within each category.



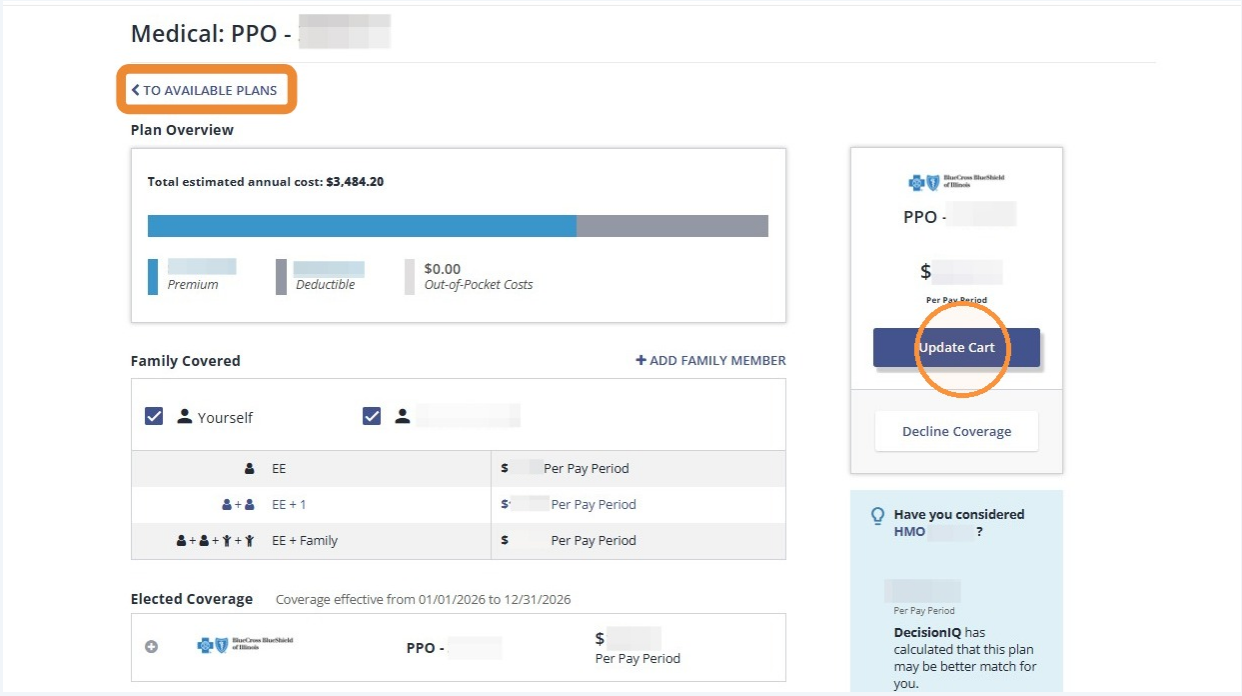
9 Click on “View Plan” to view plan details.

Click "Decline Medical Benefits" to opt out of the coverage.



10 To add the selected plan to your cart, click “Update Cart”.

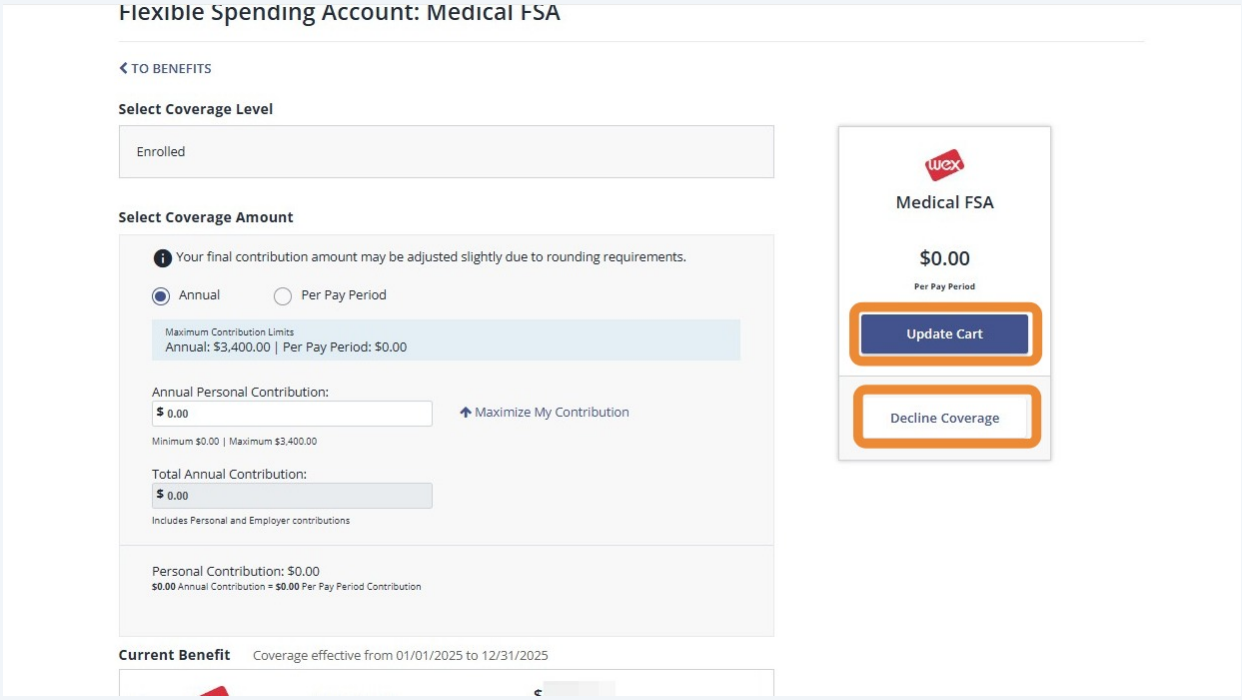
To go back and see the other plan options, click “TO AVAILABLE PLANS”.



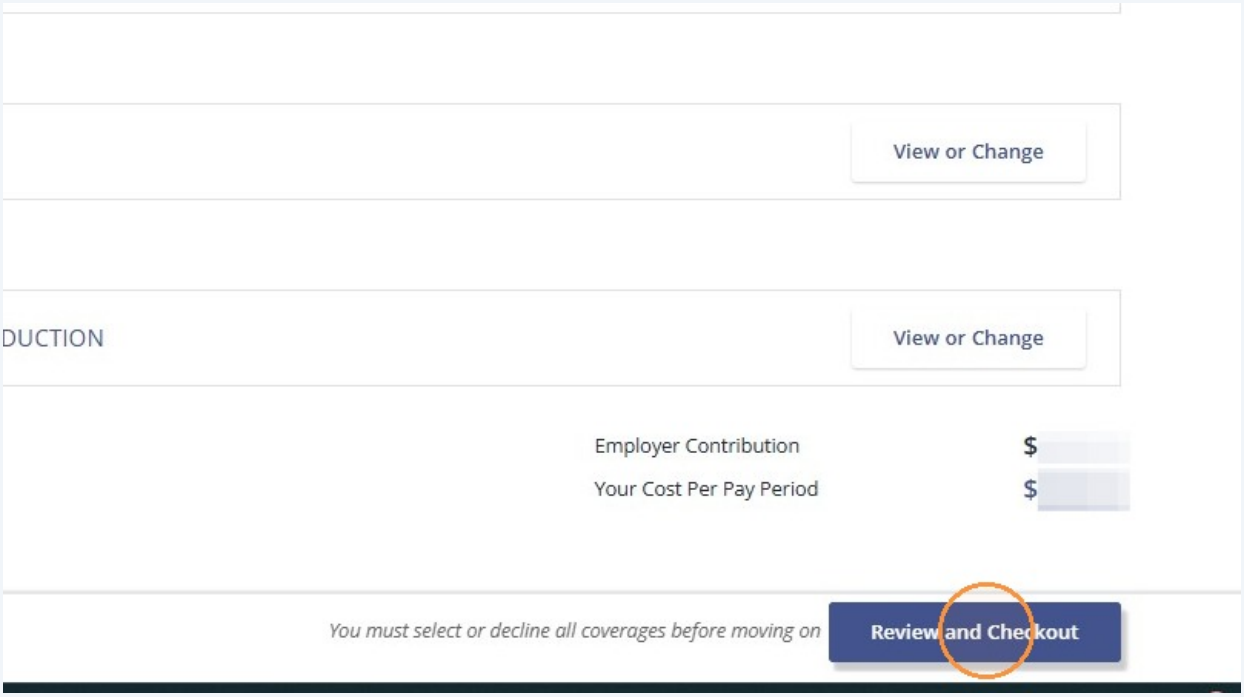
Primary Care Provider

If you elect an HMO plan you will be asked to enter your primary care provider information 3 digit medical code. Fill this information out for each family member then click “Continue”.

11 Continue adding or declining your available plans.

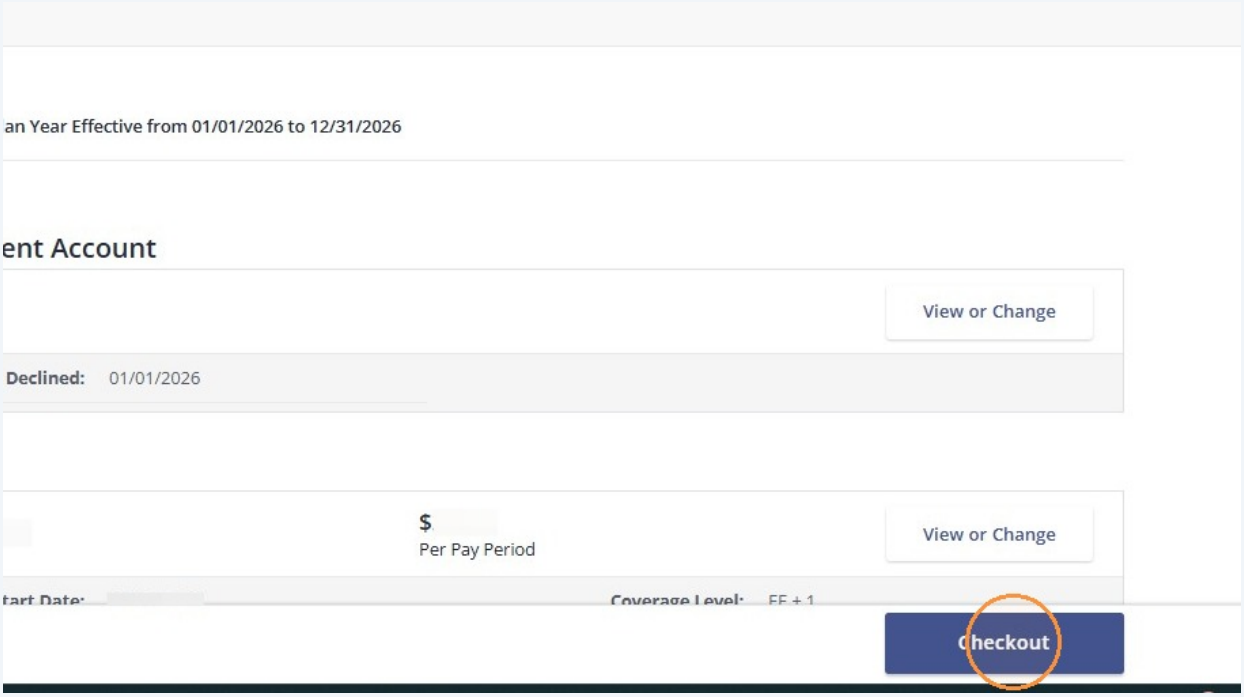


12 Click "Review and Checkout" after reviewing and updating all available plans.



13 This will bring you to your confirmation summary. Take your time to review this statement. Ask yourself if you have added all of the coverages you wanted. Did you add your dependents to the preferred benefits? This is your last chance to review and make changes before your submit your elections.

To confirm and submit your elections click “Checkout”.



⚠ Evidence of Insurability (EOI)

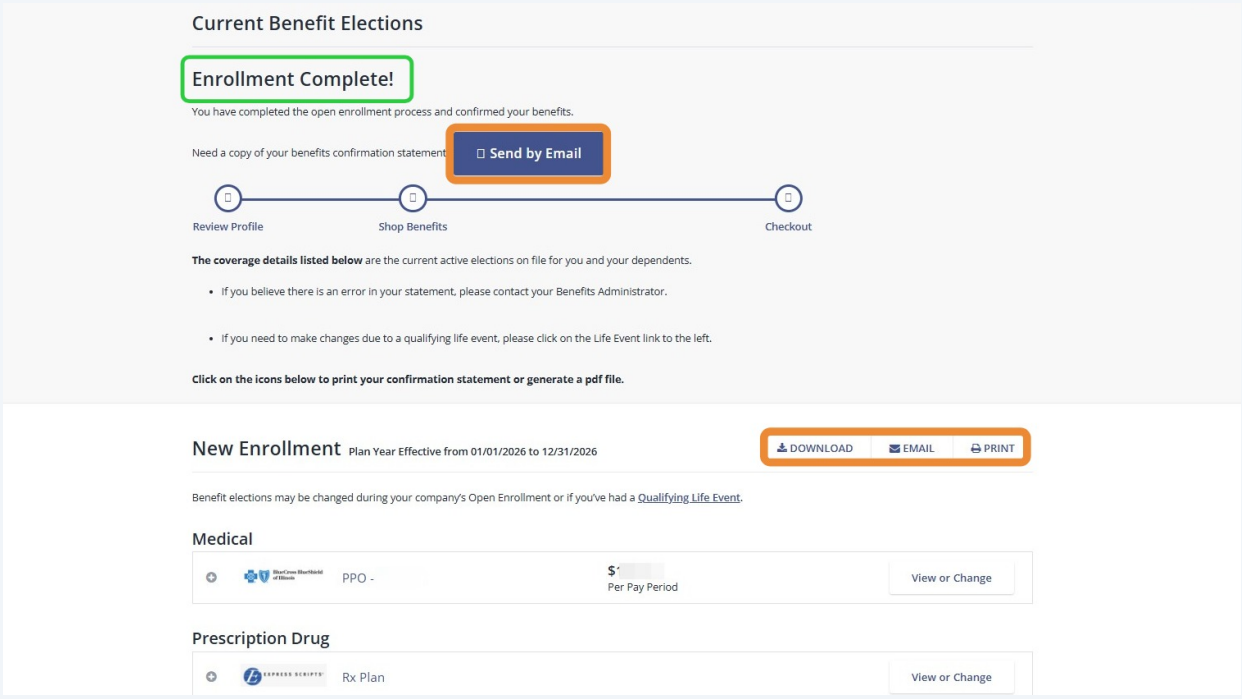
If you make a life insurance election that requires Evidence of Insurability (EOI), you can expect the following:

- Once Securian receives the election information, the online EOI/medical underwriting process begins.
- Securian will reach out to you directly with your username/password for the online EOI process.
- Employees will receive this information via email, but spouses will receive a letter in the mail.
- If the online EOI process is not completed within 21 days, you will receive a reminder. If not completed within 42 days, this coverage will be automatically declined.

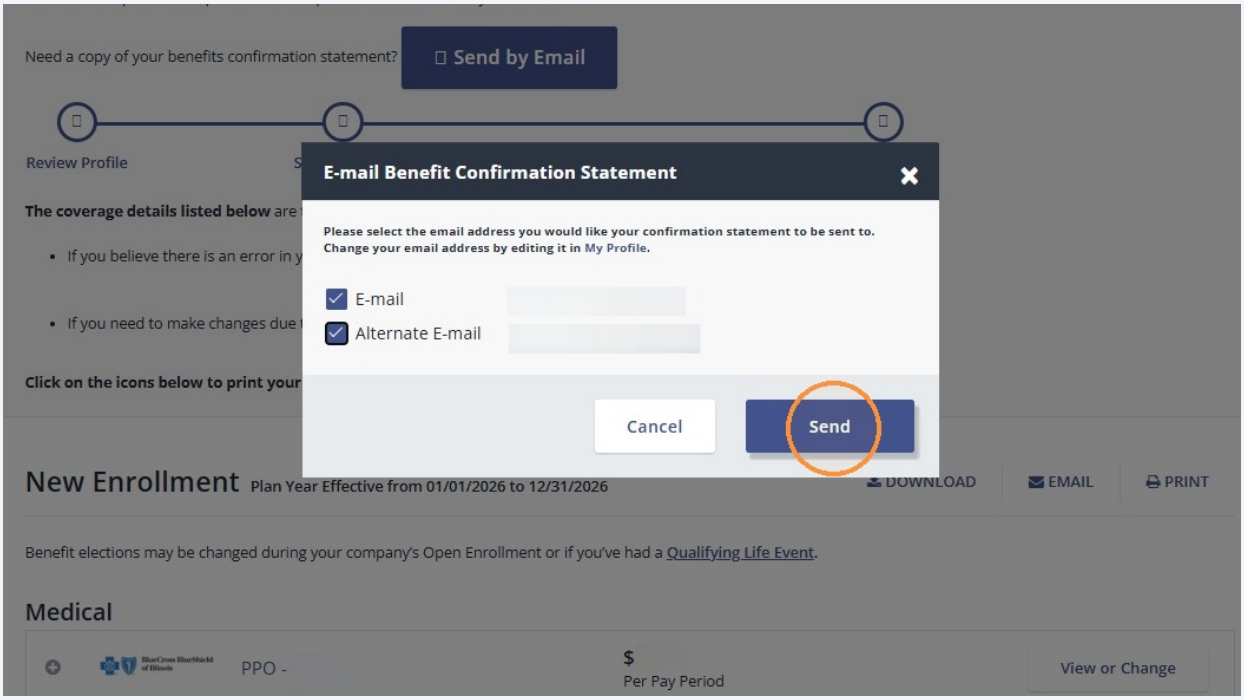
14 Congratulations you have completed your enrollment!

You can send yourself a copy of your selections by clicking “Send by Email”. Additionally, you can download or print a copy of your confirmation page.

You are only finished once you have seen the "Enrollment Complete" message.



15 If you choose to send yourself a email, you can select which email address you would like the confirmation to go to, then click "Send".

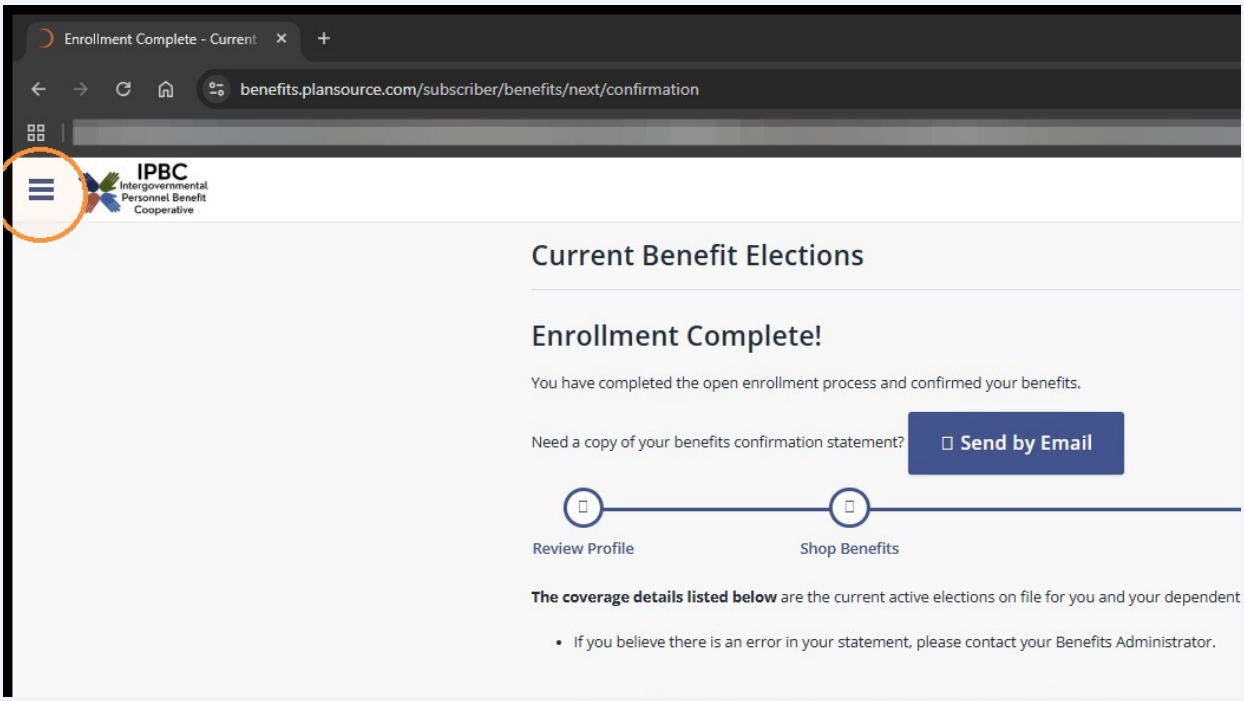


Uploading required documents for new dependents

16 If you added a **new** dependent and are enrolling them in insurance coverage, you will be asked to submit proof of eligibility documentation. PLEASE NOTE: FAILURE TO PROVIDE THE REQUIRED DOCUMENTATION WITHIN THE ALLOTTED TIME FRAME WILL RESULT IN YOUR DEPENDENT(S) BEING TERMINATED FROM COVERAGE.

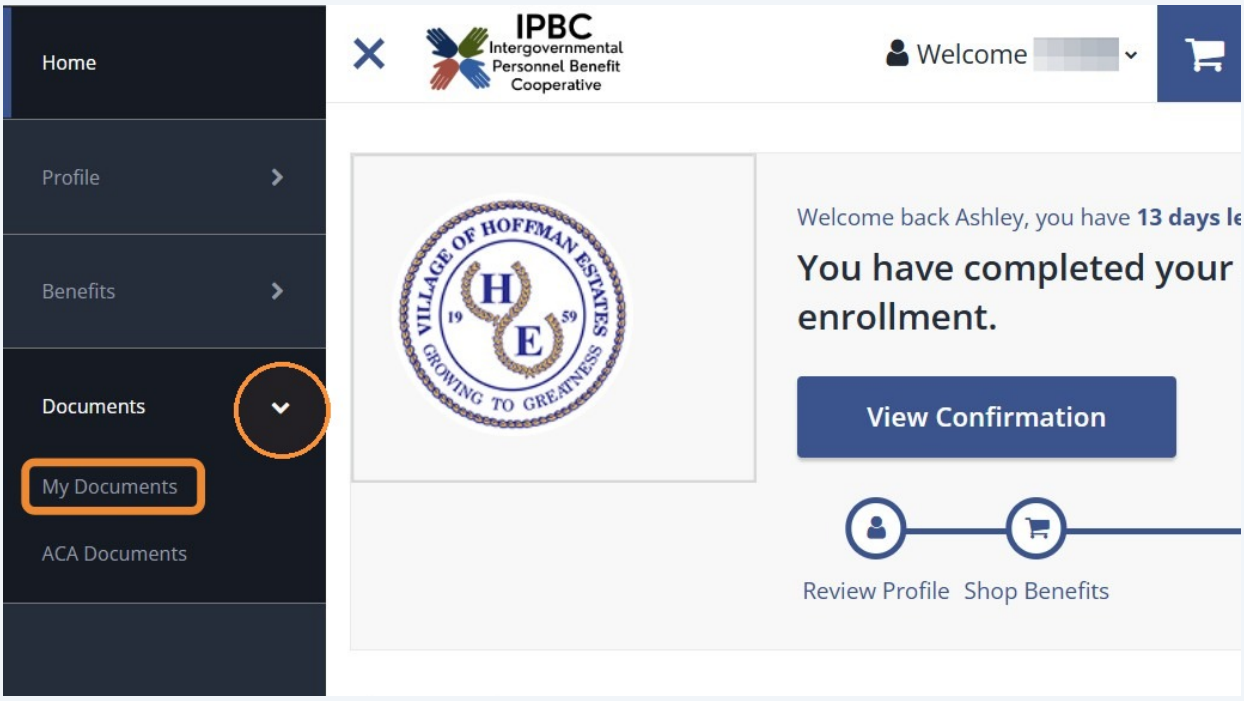
Once you have completed making your elections, please follow the steps below.

17 Expand the menu bar.



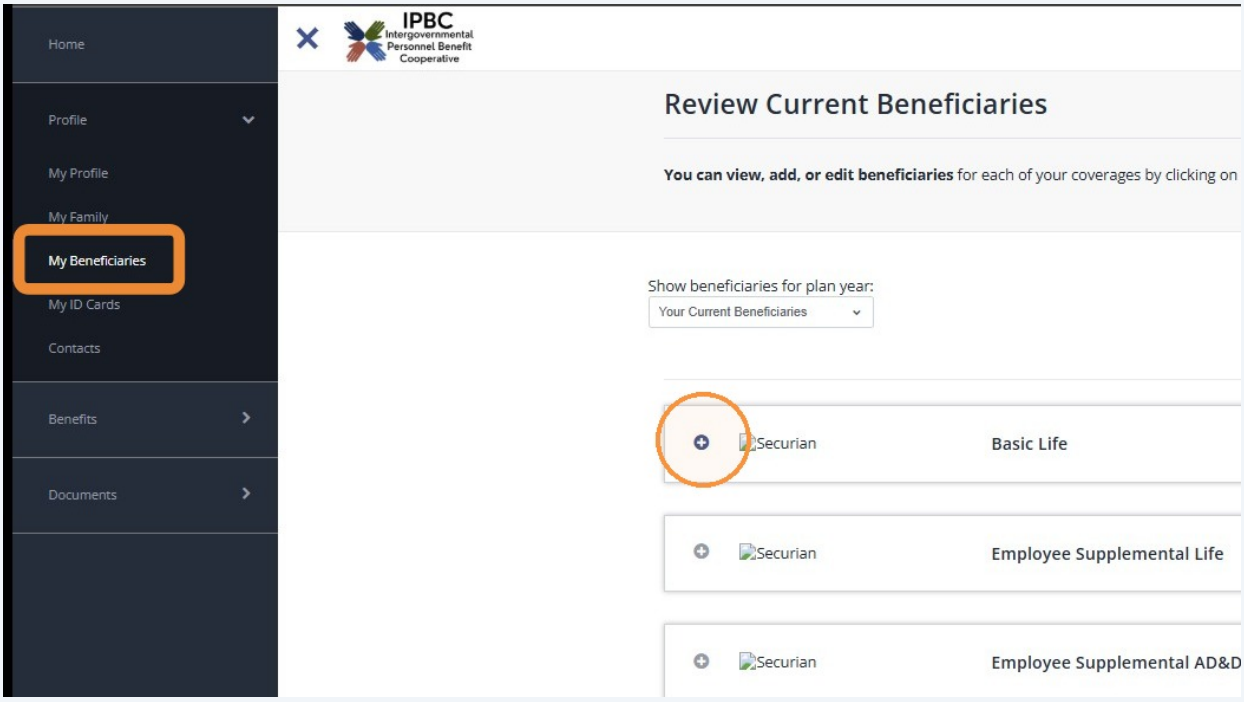
18 Expand the "Documents" tab and click "My Documents". This page will display the due date under the "Required Documents" section.

Upload the file on the screen and click "Submit" for HRM to review.



Updating beneficiaries for life insurance

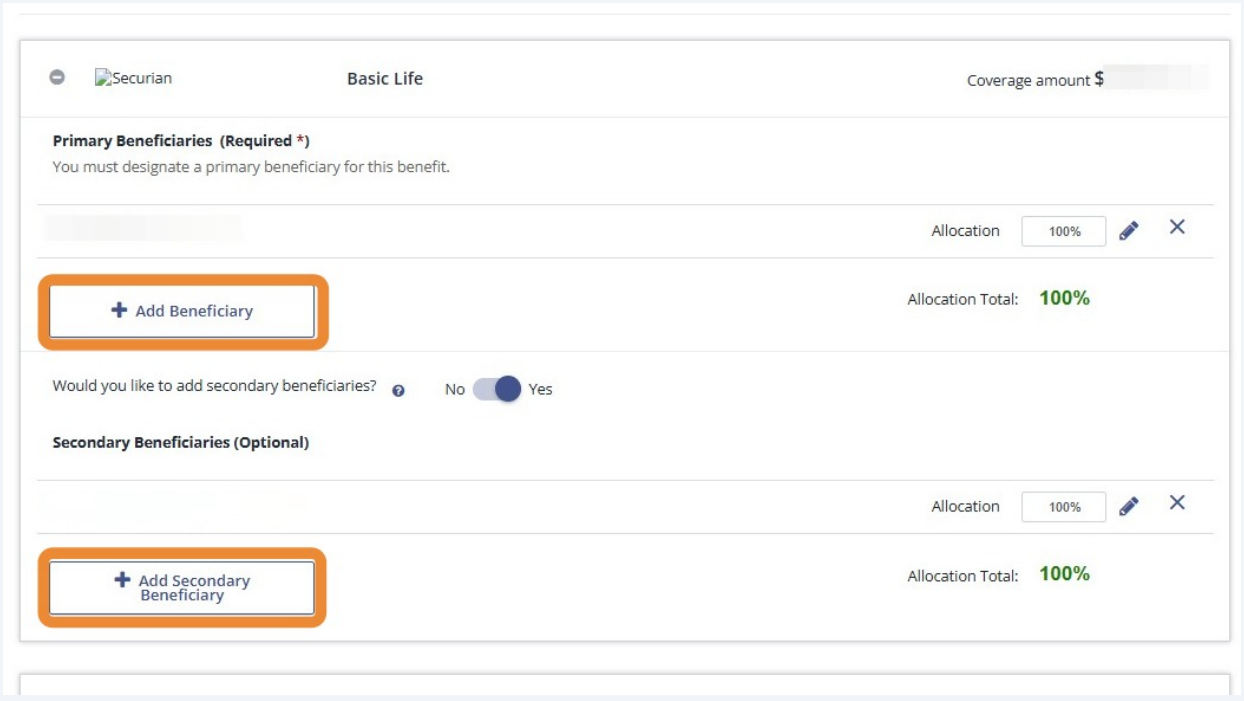
19 Expand the "Profile" menu tab and click "My Beneficiaries". Select the life insurance plan, then click the “+” sign to see your details.



20 To add a beneficiary, click on the "+ Add Beneficiary" or "+ Add Secondary Beneficiary" button. Please note, adding secondary beneficiaries is optional.

To edit existing beneficiaries, click the pencil icon.

Double check that your allocations add up to a total of 100% for primary and secondary beneficiaries.



21 Once you've added your beneficiary's information, click "Add".

