

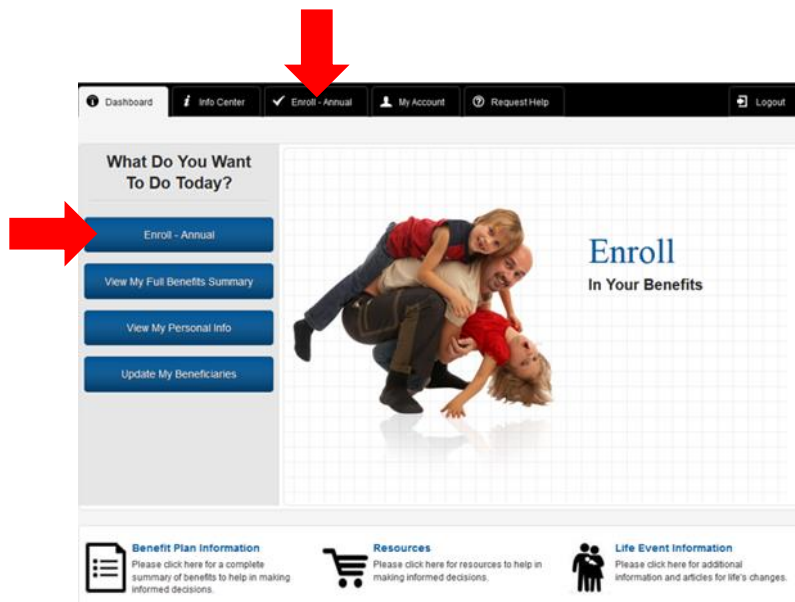
## Log in

- URL: To access your online enrollment website, go to <https://benefits.plansource.com>.
- Username: the first initial of your first name, up to the first six characters of your last name, and the last four of your SSN.  
Example: An employee named Jane Anderson, with the SSN xxx-xx-1234 would have the username “janders1234”.
- Default Password: Your birthdate in YYYYMMDD format.  
Example: A birthdate of August 14, 1962 would result in the password “19620814”.



## Launch Enrollment

- Click **Enroll- Annual** in the Dashboard in order to begin enrollment.



## Verify Your Personal and Family Information

- Begin Step 1 **Your Info**, select **Continue**.
- Verify your personal information, and then click **Continue** at the bottom of the page.

**1 Your Info**  
In this step you will review, verify, and if necessary, update your personal information. You will only be allowed to update the information allowed by your employer. **Continue**

**2 Your Dependents**  
In this step you will verify and/or update your dependents. All dependents that you plan to include in your benefit elections need to be added in this step. Pending

**3 Enroll in Your Benefits**  
In this step you will make all of your benefit elections. You will be allowed to make benefit selections for all of the benefits that are offered by your employer for which you are eligible. Pending

**4 Summary and Review**  
In this step you will review all of your elections and have the option of emailing yourself a confirmation summary of your benefit elections. Pending

- Step 2: Verify your family information, and add any eligible dependents by clicking **Add Dependent**. When you are satisfied, click **Continue**.

Step 1: Your Info Step 2: Your Dependents Step 3: Your Benefits Step 4: Your Summary

Dependents must be listed on this page to be enrolled in coverage.

You may:

- Add New Dependents
- Edit Existing Dependent Information
- Remove Existing Dependent

By adding a dependent, you are confirming that this is a legal dependent, eligible for benefits under one or more of your available plans.

**Spouse Test**  
RELATIONSHIP: Spouse  
BIRTHDATE: 02/07/1981  
QMCSD: NO  
VERIFIED: NO  
Edit Information  
Remove Coverage

**Child Test**  
RELATIONSHIP: Child  
BIRTHDATE: 02/01/2014  
QMCSD: NO  
VERIFIED: NO  
Edit Information  
Remove Coverage

**New Dependent**  
Add Dependent

Back Continue



## Make Your Benefit Elections

- After clicking **Continue** on the dependent review, the first benefit will be available to make an election.
- Once you have decided on a plan, choose your desired tier underneath that plan name. Ensure that any dependents to be covered have the box checked next to their name (pictured below), and then click the Continue button.

The screenshot shows a form with two sections. The top section is titled 'LEVEL(S)' and 'COST'. It has three radio button options: 'EMPLOYEE ONLY', 'EMPLOYEE + 1 DEPENDENT', and 'EMPLOYEE + 2 OR MORE DEPENDENTS'. The third option is selected. Below this is a note: 'Note: All valid dependents have been automatically selected. Modify to remove unwanted selections (if any), then click continue.' There are two checkboxes: 'Spouse Test (Spouse 02/07/1981)' and 'Child Test (Child 02/01/2014)', both of which are checked. Below this is a 'Decline' section with a 'LEVEL(S)' and 'COST' header and a 'DECLINE' radio button option. At the bottom of the form are two buttons: 'Back' and 'Continue'. The 'Continue' button is highlighted with a red box.

- Walk through each screen and make your selections to enroll or waive each plan, click **Continue** at the bottom of each section to move to the next step.
- Certain enrollment levels will require Evidence of Insurability (EOI) or special approval. You may be required to fill out an application as part of the approval process. If you elect a coverage that requires an Evidence of Insurability this will be noted on the election (\* EOI Required). The form will be available to download when you click continue, or in the InfoCenter.
- If you elect voluntary life insurance, you will be required to designate your beneficiaries.
  - Click **Add Primary**, select an existing dependent as the beneficiary from the drop down list or enter the name, relationship, and allocation amount (% this beneficiary is to receive of the benefit). Click **Save**.

The left screenshot is titled 'Voluntary Employee Life & AD&D Beneficiaries'. It has two sections: 'Primary Beneficiaries' and 'Secondary Beneficiaries'. Both sections have a table with columns for 'Name\*', 'Relationship\*', '% Allocation\*', and 'Remove'. Below each table is an 'Add' button. The 'Add Primary' button is highlighted with a red box and a red arrow points to it. At the bottom are 'Back' and 'Continue' buttons. The right screenshot is titled 'Add Beneficiary'. It has a dropdown menu for 'Select a beneficiary:' with 'Spouse Test - Spouse' selected. Below are input fields for 'Name:' (containing 'Spouse Test'), 'Relationship:' (containing 'Spouse'), and 'Allocation:' (containing '100'). At the bottom are 'Cancel' and 'Save' buttons.

- Multiple beneficiaries can be added as a primary or secondary, allocations in each area much equal 100%.



## Confirm and Save your Enrollment

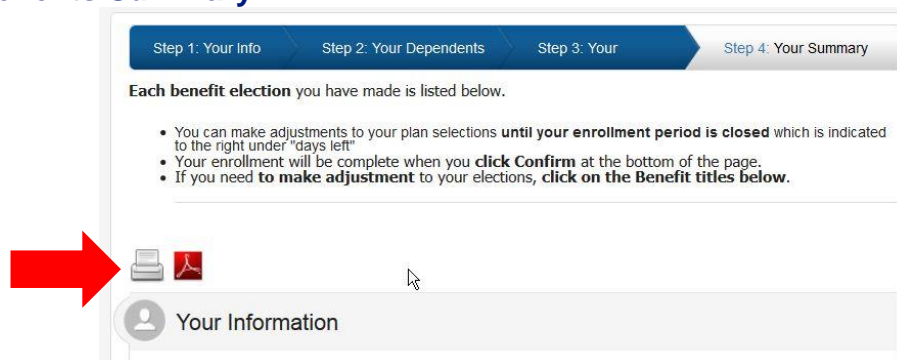
- Once you have finished making elections, you will be directed to the Confirmation Statement.
  - If you'd like to make a change in your any of the elections on the summary, click the benefit name to return to the selections.



- When you click **Confirm**, your enrollment is saved, and you will receive a confirmation email. **You must click the Confirm button in order to complete the enrollment.**



- You are able to Print your confirmation statement during **Step 4** or from the Dashboard **View My Full Benefits Summary**.



- Any benefits that require an Evidence of Insurailbly form will be listed as pending coverage.

Voluntary Spouse Life & AD&D			
ELECTION	DATES	YOUR COST	EMPLOYER COST
Lincoln Voluntary Spouse Life and AD&D - Enrolled	Start Date: 01/01/2015		
Volume: \$50,000.00			
Spouse Test (Spouse)	Start Date: 01/01/2015		
<b>Pending Coverage Election</b>			
Lincoln Voluntary Spouse Life and AD&D - Enrolled			
Volume: \$55,000.00			
You have requested coverage of \$55,000.00. Of this amount, \$5,000.00 is subject to approval. If approved, your cost will increase \$			
Spouse Test (Spouse)			

- Contact your Human Resource if any updates are needed.
- To view current Benefits Summary click **View My Full Benefits Summary** in the Dashboard.



