Employee Experience

Enrollment Guide

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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: <u>https://benefits.plansource.com/</u>
- 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 "WelcomeYYYY" with YYYY being your birth year. Example: a birthdate of February 7, 1975 would look like this: Welcome1975.

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 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		& Welcome Kevin ~ 📜 \$0.00 Per Pay Period
Profile	Verify your Personal Information an	id make changes if needed
My Profile My Family My Beneficiaries My Devices Contacts	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 chain the process of the p	ange it on this page, please contact your Human Resources representative.
Benefits 🌗	> First Name *	le Name * Abert
Documents	> User Name SSN *	X-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:

Profile My Profile My Profile My Profile My Devices Contacts Documents Alex Teddy Spouse Born 05/05/1980 View Details Tenove Edit Alex Teddy Spouse Born 05/05/1980 View Details Tenove Edit Alex Teddy Spouse Born 05/05/1980 View Details Tenove Edit Alex Teddy Spouse Born 05/05/1980 View Details Tenove Edit Alex Teddy Spouse Born 05/05/1980 View Details Tenove Edit Alex Teddy Spouse Born 05/05/1980 View Details Tenove Edit		THRIVEH OSPITALITY		Å Welcome Marianne 🗸	Per Pay Period
Wy Family My Devices Contacts Documents Ocuments Remove Edit	Profile 🗸	Manage your family me	embers		
Contacts Benefits Alex Teddy Spouse Born 05/05/1980 View Details Remove Edit				member won't be added to your b	enefits automatically. You still need
Spouse Born 05/05/1980 View Details Remove Edit		Current Family Members			
Documents View Details Remove Edit	Benefits ¹ >	Spouse			
	Documents >		🕂 Add Family Member		
★ Back		Remove Edit			
		< 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.

		THRIVEH OSPITALITY		📥 Welcome Marianne 🗸	Per Pay Period	1
	~	Verify your Dependent Inform	ation and make chang	es if needed		
My Profile My Family		You are confirming that this a legal dependent, eli	gible for benefits under one or more of	f your available plans.		
		Basic Info				
	>	First Name * Alex	Middle Name	Last Name * Teddy		
	>	SSN XXX+XX+0000 Relationship *	Gender * Male	 Birthdate * 05/05/1980 		8
		Spouse				
		Additional Info				
		Verified No				
					Cancel	Save
		Figure 4 De	ependent Informati	on		

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		
<u>ه</u> ه		
Review Profile Shop Benefits		Checkout
To make a change, click on the benefit name. To complete your enrollment, click Rev	view and Checkout at the bottor	n 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
		भ्र Review and Checkout
	You must select or a	decline all coverages before moving on
	Your Benefits Review Profile To make a change, click on the benefit name. To complete your enrollment, click Review Profile New Enrollment Coverage effective from 08/01/2017 to 07/31/2018 Medical Image: Coverage effective from 08/01/2017 to 07/31/2018 Medical Image: Coverage effective from 08/01/2017 to 07/31/2018 Dental Image: Coverage effective from 08/01/2017 to 07/31/2018 Vision Image: Coverage effective from 08/01/2017 to 07/31/2018 Vision Image: Coverage effective from 08/01/2017 to 07/31/2018 Voluntary Employee Life	Your Benefits Image: Stop Benefits Revew Profile Stop Benefits Medical Image: Stop Benefit Image: Stop Benefit

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.

	Per Pay Period
Current Benefit Elections	V Medical Shop
a	V Dental Shop
Review Profile Shop Benefits • To change an election, click directly on the name of the benefit.	Vision Shop
To complete enrollment, click continue at the bottom of the page.	✓ Basic Employee Life/AD&D: Basic Life & AD&D
Current Benefits Coverage effective from 01/01/2017 to 12/31/2017	Voluntary Employee Life
	Basic Long Term Disability: LTD
Medical	Health Care Reimbursement Account Shop
No Plan Selected	Dependent Care Reimbursement Account Shop
Dental	2 of 8 Benefits Complete
No Plan Selected	😭 Review & Checkout

Vision

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	THRIVEH OSPITALITY	🌡 Welcome Marianne 🗸	F \$0.00 Per Pay Period
Profile >	Your Benefits		
Benefits	Review Profile Shop Benefits To make a change, click on the benefit name. To complete your enrollment, click Re	view and Checkout at the bottor	Checkout
	New Enrollment coverage effective from 08/01/2017 to 07/31/2018		
	Medical No Plan Selected		Shop Plans
	Dental		Shop Plans
	Vision		Shop Plans
	Voluntary Employee Life		Shop Plans
		You must select or (Per Pay Period: \$0,00
	Figure 7 Benefits Election P	age	

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.

Home	THRIVEH OSPITALITY	👗 Welcome	Marianne - 📮 \$0.00 Per Pay Period
Profile >	Shop for Medical		
Benefits •• •	figure it out. Watch these videos to learn about the differe	n be a little complicated. But don't worry, we're going to help nt types of medical plans and how they work.	you Additional Content (2): • What is a Copay? • What is Coinsurance?
Documents >	N/ - H-sl	• View More	
	Family Covered Yourself HDHP \$5000 Deductible C HDHP Select Select a Plan	t 70 - \$10,000 Deductible 😵 Open Access Value \$15/	Edit Family Covered Compare (3)
	ADDEP \$5000 Deductible \$10.00 Cost per pay period	HDHP Select 70 - \$10,000 Deductible \$20.00 Cost per pay period	Open Access Value \$1500 \$45.00 Cost per pay period
	Calendar Year Coinsurance (C Calendar S2,500 / \$5,0 80% / 20% Nor View Plan	Calendar Year Coinsurance (C Calendar \$3,500 / \$10, 80% / 20% Nor View Plan	Calendar Year Coinsurance (C Calendar \$2,500/\$4,000 80%/20% \$5,000/\$ View Plan
	Compare	Compare	Compare
	Decline Coverage \$0.00 Cost per pay period		



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 clicking "Edit Family Covered."
- Click on the benefit you wish to enroll in.

	THRIVEH OSPITALITY			🚨 Welcome N	Iarianne 🗸 🎦 Per Pay Period
	> Medical: HDHP \$5000 Dedu	ictible			
	< To Available Plans				
New Enrollment Enrollment Incomplete	Family Covered			🖋 Edit Family Covered	aetna HDHP \$5000 Deductible
	> Yourself, Alex				\$25.00
	Coverage Levels				Cost per pay period
	🚢 Employee Only		\$10.00 Cost per	pay period	🐂 Update Cart
	🛔 + 🛔 Employee + Spouse		\$25.00 Cost per	pay period	O Decline Medical Benefits
	≜ +¥ + ¥ Employee + Children		\$37.50 Cost per		
	▲ + ▲ + ¥ + ¥ 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	0,000	\$10,000 / \$20,000	
	Lifetime Maximum	Unlimited		Unlimited	
	Preventive Care Routine Exams	No copay (1	00% covered)	No copay (100% covered)	
	Primary Care Office Visit	80% after d Coinsuranc	eductble and e	60% after deductble and Coinsurance	
	Specialist Office Visit	80% after d Coinsuranc	eductble and e	60% after deductble and Coinsurance	
	Inpatient Hospitalization	80% after d Coinsuranc	eductble and e	60% after deductble and Coinsurance	
	Outpatient Surgery	80% after d Coinsuranc	eductble and e	60% after deductble and Coinsurance	
	Diagnostic Laboratory	80% after d Coinsuranc	eductble and e	60% after deductble and Coinsurance	
	Diagnostic X-Ray	80% after d Coinsuranc	eductble and e	60% after deductble and Coinsurance	
	Diagnostic X-Ray for Complex Imaging	80% after d	eductble and	60% after deductble and	

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.

Home	THRIVEH)SPITALITY	👗 Welcome Mariar	nne - \$30.00 Per Day Berlind	Â
Profile >			\$30.00 Per Pay Period	
Benefits 🕛 🗸 🗸	Review Profile Shop Benefits		\$30.00 Per Pay Period	×
New Enrollment Enrollment Incomplete	To make a change, click on the benefit name. To complete your enrollment, o	lick Review and Checkout at the bottom of the	Medical: HDHP \$5000 Deductible	\$25.00
Documents >			Y Dental: Dental Plan	\$5.00
	New Enrollment Coverage effective from 08/01/2017 to 07/31/20	018	Vision: Dedine	\$0.00
	Changed Benefits		Voluntary Employee Life: Decline	\$0.00
	Medical		4 of 4 Benefits Complete	
	Generic HDHP \$5000 Deductible	\$25.00 Cost per pay period	🌹 Review & Checkout	
	Pending Approval			
	Dental			
	MetLife Dental Plan	\$5.00 Cost per pay period	Change Plan	
	Vision			
	Coverage Declined		Change Plan	
	Voluntary Employee Life			
	Coverage Declined		Change Plan	-
			Per Pay Period: \$30.0	0
		You must	Review and Checkout select or decline all coverages before moving on	
				*



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!

Home	THRIVEH OSPITALITY	👗 Welcome Marianne 🗸	\$30.00 Per Pay Period
	Shop for Benefits		
Benefits 🗸 🗸	Enrollment Complete! You have completed the open enrollment process and confirmed your be	enefits.	
	Review Profile Shop Benefits		Checkout
	Open enrollment is your opportunity to shop and enroll in benefits for you help you make more informed choices. Watch this video to learn more an Unc		eos that explain each type of benefit and
		O View More	
	New Enrollment Coverage effective from 08/01/2017 to 07/3	1/2018	🛓 Download 🛛 🔤 Email 🔒 Print
	Below are your new enrollment. Benefit elections may be changed durin Medical	g your company's Open Enrollment or if you've had a Qualif	ving Life Event.
	Generic HDHP \$5000 Deductible	\$25.00 Cost per pay period	View Plan
	A Pending Approval		
	Dental		
	MetLife Dental Plan	\$5.00 Cost per pay period	View Plan
	Vision		
	• Overage Declined		View Plan

Figure 11 Confirmation Page

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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 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.

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.

Appendix

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

Home	THRIVEH OSPITALITY	📥 Welcome Elizabeth 🗸	٦	\$0.00 Per Pay Period
Profile >	Welcome Elizabeth, Do You Need to Update Your Benefits? Click below if you've had a qualifying life event, such as getting married or an addition to the Update My Benefits Image: Comparison of the Stop Benefits Review Profile Shop Benefits	ne family.		
	Need to update your current benefits? Have you had a qualifying life event? Would you like to change your HSA a Update your current benefits.	mount?		

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."

Home	THRIVEH OSPITALITY		& Welcome Elizabeth ~ 🐂 \$0.00 Per Pay Period
Profile >	Report Life Event		
	Changes like these that are made outside of standard	d benefit enrollment are called Life Events	ve a baby you may want to add him/her to your health coverage. s. First, select the type of Life Event from the drop down list to I be given additional information on the type of change for the
	Select Life Event *	Marriage	
	Legal Separation	Congratulations and best wishes to yo for both of you.	ou and your new spouse. Your employer offers benefits coverage
	Loss of Dependent Status	Marriage is a qualified change in statu changes must be consistent with your	is, so you may make certain changes to your benefits. The
	Marriage	changes must be consistent with your	
	Moved		
	Overage Dependent	04/01/2017	180 Days left to make changes
	Dependent Gains Coverage Dependent Loses Coverage	Notes	
	Significant Change in Cost of Coverage		
	Commuter/Transit Benefit Change		
	K Back		Continue

Figure 13 Report Life Event

- 3. Add/Remove Dependents (if necessary)
- 4. Update Benefits as necessary

5. Review Selection and Checkout

Click to Chat

If your company has the ability to chat with you to assist with your benefits, you can reach out to them via two tabs. They each open the below Click to Chat modal. Once you submit your information, you will be able to connect to your administrator to chat.

- Need Help? This tab directly opens up a Click to Chat modal that allows you to insert your name and email in order to reach your administrator.
- GuideMe Within the GuideMe tab is a button that reads "Click to Chat" select it and the Click to Chat modal will open.

Home	Welcome Roger - 📮 \$167.28 Per Pay Period	
	Confirm your Benefit Elections	
Benefits	Review Profile Shop Benefits Checkout	
	Each benefit election you have made is listed below.	
	Live Chat Support Request First Name First Name Last Name Last Name Email Address Email Address Revie 401(k Submit	eed help?
	Generic 401(k) View Plan Start Date: 01/01/2018 Coverage Level: Enrolled Contribution Percentage: 1%	
	The following benefits are unchanged	

Figure 14 Click to Chat Modal

Contacts

The Contacts page contains important contact information regarding your employer and carrier for your convenience. You may also add, remove, or edit your own person contacts.

Home	Mountain Creek Outfitters		5 2.11 r Pay Period
Profile 🗸	Successfully saved		×
My Profile	Contacts		
My Family My Beneficiaries	This section allows you to manage your personal contacts as well benefit related contacts to one secure location.	as view contacts supplied by your carrier or employer, b	pringing all your
My Devices Contacts	Q Search		
	Faurilation Contacts		
	Employer Contacts The following important contacts are provided by your employer a	and carrier for your convenience.	
Admin >	A Mr. Plansource	€ 555-5	55-1212 (Work)
	My Contacts You may add, remove and edit your personal contacts below.		+ Add Contact
	🚢 Mom Momerson	\$ 407-4	44-4444 (Cell)
	🛔 Spouse Tester	407-5	55-5555 (Cell)
			62
			Need help?
	Figure 15 Contacts P	age	

Document Management

Benefit Documents

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:

	THRIVEH SPITALITY		1.20 er Pay Period
	Benefit Documents		
	This section allows you to view documents related to your benefits as provided by your employ an archive (zip file) containing a directory of files click the download button to the right of each l		
	click its link.		
Benefit Documents	Documents	Search	Q
	• 11/01/2016 to 12/31/2016		🛃 Zip
	image.jpg	05/04/2016	View
	New Video Reference	05/04/2016	View
	2016 Bronze Plus - Out of Area Plan SBC.pdf	10/21/2015	View
	Medical		🛃 Zip
	2016 Silver Plus Plan SBC.pdf	10/21/2015	View

Figure 16 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.

Tax Documents

If your company provides you with 1095-C Tax Forms, they will be listed under Documents as shown below.

				🚨 Welcome Joseph 🗸	1	\$161.67 Per Pay Period
	>	Tax Doc	uments			
	>		documents have been requested from yo ng the requested documents in a timely fa	u. Please be aware that acceptance of enrollment in shion.	n any nun	nber of benefits may rely on
	~	Current Cale No current do	endar Year cuments exist.			
Tax Documents						
		Prior C	alendar Year			
		2016	Thrive Hospitality	1095 -C Tax Form		A View Form

Figure 17 Tax Documents

Required Documents

If your selected benefits require any kind of required documents, you will see a red exclamation mark beside "Documents" in the menu. You will be able to upload any required document/s under My Documents as shown below.

Home	Mountain Creek Outfitters	👗 Welcor	ne Jay - 😭 \$52.11 Per Pay Period
Profile >	My Documents		
Benefits >	The following documents have been requested your submitting the requested documents in a t	from you. Please be aware that acceptance of en timely fashion.	ollment in any number of benefits may rely on
Documents 🏮 🗸 🗸	Required Documents		
My Documents 1 Document Required	Driver's License Jay Alexander	Birth Certificate Jackie Alexander	
	Welcome to Mountain Creek Outfitters!	Pending Review	
	Please provide a copy of your Driver's License. Thank you!	Birth_Certificate.docx	
	Drag document here or dick to browse Expiration date	Edit	GuideMe
	Other options: Select an existing document Cannot provide required document I will supply the document later		~•
	 Existing Documents Birth_Certificate.docx Birth Certificate Jackie Alexander 		Need help?

Figure 18 Uploading Required Benefits

Other Options for Required Documents

If you cannot upload the Required Document, we offer other options depending upon your company's settings.

- Select an existing document: This allows you to select a document that you have previously uploaded and apply it to the required document slot.
- **Cannot provide required document:** This slot allows you to provide a reason for why you cannot provide the document. This allows an administrator to reach out to you to discuss other options.
- I will supply the document later: This provides you with the date that the document is due by in order to have coverage.

Home		🚔 Welcom	e Tester - 🐂 \$66.83 Per Pay Period
	My Documents		
	The following documents have been requested your submitting the requested documents in a		nrollment in any number of benefits may rely on
	Required Documents		
My Documents 1 Document Required	Proof of Creditable Coverage Tester Document	Proof of Creditable Coverage Tester Document	Proof of Creditable Coverage Tester Document
	Reason why this document cannot be provided. Or description of alternate document. *	You have chosen to add this document later. You must supply this document	Select one of the existing documents:
		^{before:} 11/18/2017	Submit
	or attach alternative document		Cancel
	Drag document here or click to browse	Submit	
	L	Cancel	GuideMe
	Submit		-
			<u>~-</u>
	Figure :	19 Other Options	

Employer Credits

If your company provides you with employer credits then the Benefits Dashboard and the Review Page will have additional information for you to look at.

After Employer Credit Applied

If a benefit is allowed employer credits then you will see the monetary amount that you will have to pay after the employer credit is applied to your plan. This does not appear until after you have selected a plan for the benefit. The example in the image below, shows that all of the benefits with the red boxes are allowed employer credits, while the others do not.

Home	PLANS JURCE	■ Welcome john ~ Per Pay Period
	To change your selection, click directly on the name of the page.	benefit. To complete your benefit enrollment, click Continue at the bottom of the
Benefits 🕕 🗸	Current Benefits Coverage effective from 01/0	1/2017 to 12/31/2017
Enrollment Incomplete Past Benefits	Changed Benefits Health Savings Account	
	Generic HSA Accounts	\$0.00 After Employer Credit Applied 📀 Change Plan
	Accident	
	Generic Accident	\$0.00 After Employer Credit Applied Change Plan
	• You are changing from: Accident	× Cancel Change
	Dental	
	Coverage Declined	Change Plan
	Basic Employee Life	
	• Generic Basic Employee Life	Change Plan
	Voluntary Employee Life	
	Generic Voluntary Employee Life	\$0.00 After Employer Credit Applied ⊘ Change Plan
	A You have requested coverage of \$190,000.00. O increase by \$0.00	f this amount, \$90,000.00 is subject to approval. If approved, your cost will

Figure 20 Employer Credit Applied

View Cost Breakdown

Beside the "After Employer Credit Applied" notification is a question mark that opens up the cost breakdown for your benefits. This modal shows your Credit, the original Benefit Cost, and Your Cost after the credits are applied. A link to this modal shown as "View Cost Breakdown" is also located at the bottom of the Benefits Dashboard.

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Profile	Curren	Benefit Elections					
Benefits () Open Enrollment Enrolment Incomplete Past Benefits	page.	ost Breakdown			×	Checkout ment, click Co	ntinue at the bottom of the
	> He	re is a summary of how your contribu	tions and credits Benefit Cost	are being sper Credit	it. Your Cost		
	Curi	S Employer Credit		\$400.00			
	Chan Health	Spousal Surcharge Survey This plan is paid for by your employer	\$0.00	n/a	\$0.00		
		Spousal Surcharge Cost of your selected plan	\$37.50	n/a	\$37.50	oplied 🥑	Change Plan
	Accide	E Medical Cost of your selected plan	\$200.00	-\$200.00	\$0.00		Change Dies
	G	Health Savings Account Cost of your selected plan	\$2.09	-\$2.09	\$0.00	oplied 😡	Change Plan
		Accident Cost of your selected plan	\$15.00	-\$15.00	\$0.00		
	Denta	Basic Employee Life This plan is paid for by your employer	\$0.00	n/a	\$0.00		Change Plan
	Basic	Sost of your selected plan	\$25.00	-\$25.00	\$0.00		
		\$ Your Cost Per Pay Period	l		\$37.50		Change Plan

Figure 21 Cost Breakdown

Review Page

On the review page, each benefit will show Employer Contribution, Credit Applied, Benefit Cost, and Your Cost. Right above the Checkout button is the link for "What is my Employer Credit?" Selecting this link will give you a model that provides you with your maximum credit amount and a brief description about the employer credit.

Popofita 🕕		View More	
	opt Popofito		
Open Enrollment Curr Enrollment Incomplete	ent Benefits Coverage effective from 01/01	/2017 to 12/31/2017	
Past Benefits Review	v Changes		
	al Surcharge Survey		
Documents >		B	
0	Status: Completed	Dates: View St Last Updated 11/09/2017 View St	ummary
Health	Savings Account		
	Generic HSA Accounts	Chang	ge Plan
	Start Date: 01/01/2017	Coverage Level: Enrolled	
	Employer Contribution: \$2.08	Employee Annual Target: \$50.00	
Dental			
	Generic Dental Carrier Dental PPO 1	\$0.00 After Employer Credit Applied 📀	ge Plan
	Start Date: 01/01/2017	Coverage Level: Employee Only	
	Employer Contribution: \$17.50	Benefit Cost Per Pay	
		Period: \$17.50	
	Employer Credit Applied: \$17.50	Your Cost Per Pay Period: \$0.00	
Emp	oyer Credit	Employer Contribution	\$240.54
		Benefits Cost	\$55.00
	mployer has provided with you a maximum credit of ection of your new benefits.		\$17.50
	ay choose to use some, or all of this credit. You will b	e responsible for any	
additio	nal costs after the maximum credit is applied.	Your Cost Per Pay Period	\$37.50
		Unused Employer Credit	\$160.42
		What is my Employer Credit	
			8
	l Back	Ch	? eckout



My Devices

The My Devices page contains links to Google's and Apple's store to download the PlanSource Mobile Application. It also allows you to register your device for extra security. After you register your mobile device it will be listed here for easy tracking.

Total Compensation Statement

If your company offers you a Total Compensation Statement, you will see a banner on your home page that states "My Total Compensation Statement". Select the "View My Total Compensation link to be taken to your statement.

Home	A Welcome John → 🐂 \$81.80 Per Pay Period	
Profile >	Welcome back John, you have 52 days left to enroll.	
Benefits >	You have completed your open enrollment. There's nothing else you need to do.	
	View Confirmation	
	My Total Compensation Statement A great company provides a lot more than just a paycheck. Get a complete view of your total compensation. Total Compensation Statements are available online until December 30, 2017. View My Total Compensation Statement	
		leMe

Figure 23 Total Compensation Statement Banner