

# HOW TO ENROLL OR MAKE CHANGES - PLANSOURCE

## Open Enrollment & Benefits Online Enrollment

Employees will need to make their benefit elections on Plansource, our online enrollment system. Please follow the instructions below to login and make your elections. You may use a computer, smartphone or tablet device.

1. Go to [www.plansource.com/login](http://www.plansource.com/login)
2. Follow the instructions below for your Login ID and Password. You will be prompted to choose a new password.

- **Login ID/Username** Your username is the first initial of your first name, up to the first six letters of your last name, and the last four digits of your SSN.
- **Password** your initial password is your birthdate in the YYYYMMDD format.

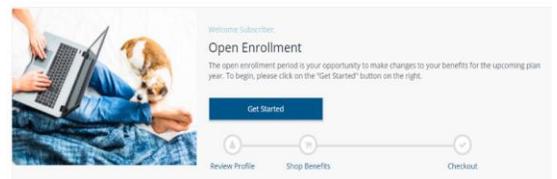
**Example #1:** Taylor Williams, SSN: XXX-XX-1234, Birthdate: January 4, 1982

**Login ID:** jwillia1234, **Password:** 19820104

**Example #2:** Rebecca Gray, SSN: XXX-XX-2345, Birthdate: August 14, 1962

**Login ID:** rgray2345, **Password:** 19620814

3. On the homepage, click **“Get Started”** to begin.
4. First, you’ll be asked to review and update your profile and ensure that all information listed about yourself and dependents is correct.
5. You can then begin shopping for benefits! Educational material about the specific plan type is available at the top of the page. Plan choices are displayed on “cards,” which provide a brief summary of what is included in the plan. Click a card to get more details about a specific plan. To select a plan, indicate which family members are covered by clicking “edit family covered” and select the card for each family member you’d like to add to the plan. Click **“Update Cart”** to choose the plan.
6. To finalize and save your choices, click **“Checkout.”** **You must complete the checkout process in order to be enrolled in benefits.**
7. You will then land on the Summary page that confirms you have completed the enrollment process. Note: You may download, email, or print the summary for your records.



Please note, this is a year-round portal, which allows you to visit frequently to confirm your benefits elections, update demographic information and/or make qualified life event changes. If you have questions, please contact your Benefits team at [benefits@healthtrustmaff.org](mailto:benefits@healthtrustmaff.org).