

HOW TO ENROLL OR MAKE CHANGES - MMA PLANSOURCE

Open Enrollment & Benefits Online Enrollment

Please follow the instructions below to login and make your elections. You may use a computer, smartphone or tablet device.

If you do not need to make changes to your insurance, you do not need to follow these steps.

- Go to <https://benefits.plansource.com>
- Follow the instructions below for your Login ID and Password. You will be prompted to choose a new password.
Note: If you've previously logged in, you will still need to use these login instructions during Open Enrollment, as the system resets previous logins/usernames to the default.
 - **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
- On the homepage, click **"Get Started"** to begin.
- First, you'll be asked to review and update your profile and ensure that all information listed about yourself, and dependents is correct.
- 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.
- Once all dependents are updated click "Next: Shop for Benefits" at the bottom of the page
- Click on the "+" next to Medical or the "View and Change Plan" to the right of the page
- In the drop down make sure to click to select the new dependent(s) you want to add to your plan.
 - *[Make sure the person is checked marked prior to closing the window or they will not be covered in the health insurance](#)*
- Once all dependents are selected, scroll down and click "Start Survey" on each of the statement boxes that have not been completed.
- Review and accept and confirm the statements.
 - *[To proceed you must acknowledge and accept each of the statements on this page. If you have questions or concerns with any of the statements, please contact our office.](#)*
- Click "Review and Checkout" at the bottom of the page.
- If selections are correct click "Checkout" at the bottom of the page
- Click on the "Update Cart" button
- Review your selections again, once complete click "Review and Checkout" at the bottom of the page
- If selections are correct click "Checkout" at the bottom of the page
- Upload documents* for each dependent added to plan
- Click **"Update Cart"** to choose the plan.
- To finalize and save your choices, click **"Checkout."**
 - *[You must complete the checkout process in order to be enrolled in benefits.](#)*
- 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