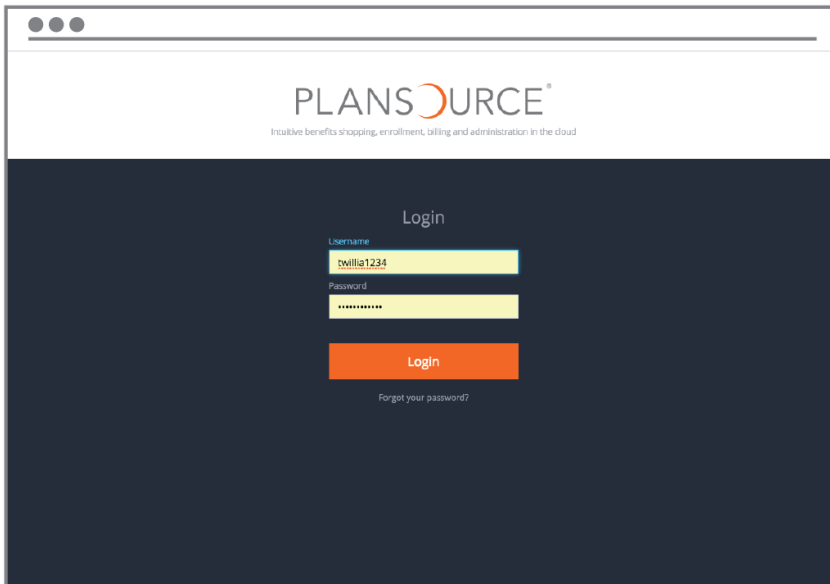# Open Enrollment Instructions

To enroll in benefits, go to: www.plansource.com/login .

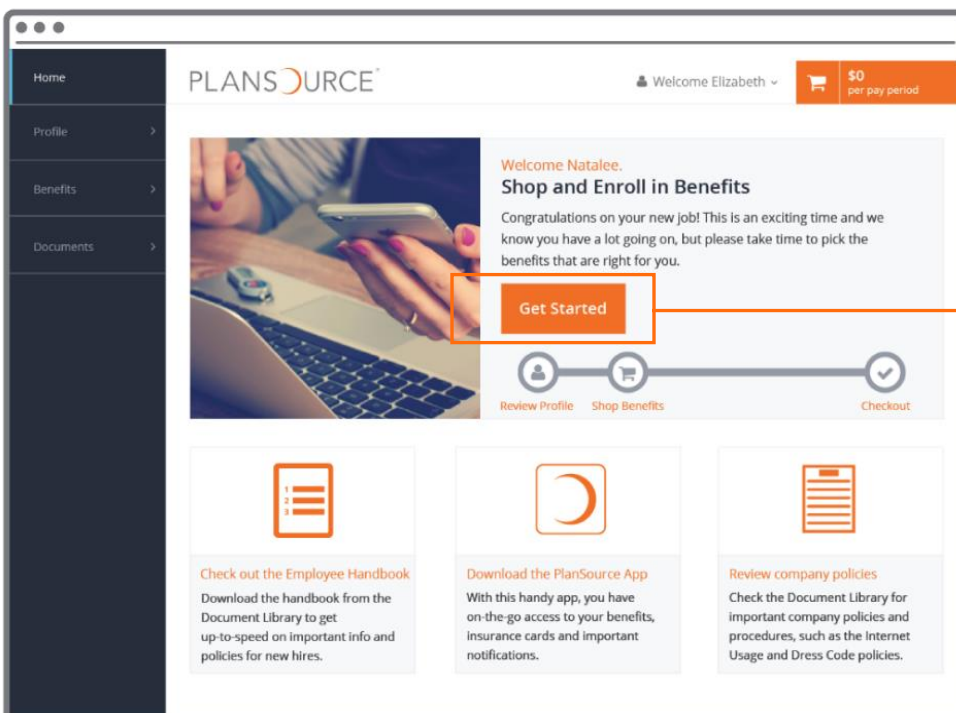**Login Page**
Enter your username and password.

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.

> For example, if your name is Taylor Williams, and the last four digits of your SSN are 1234, your username would be twillia1234.

Password: Your initial password is your birthdate in the YYYYMMDD format.
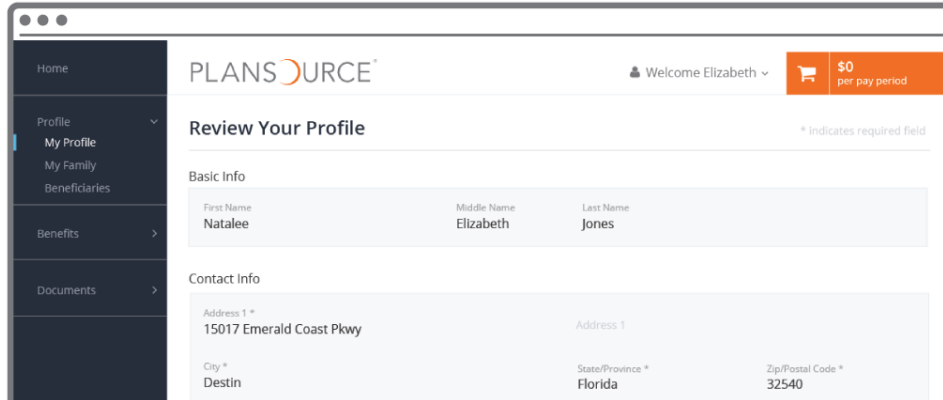
> So, if your birthdate is June 4, 1979, your password would be 19790604. The first time you log in, you will be prompted to change your password.
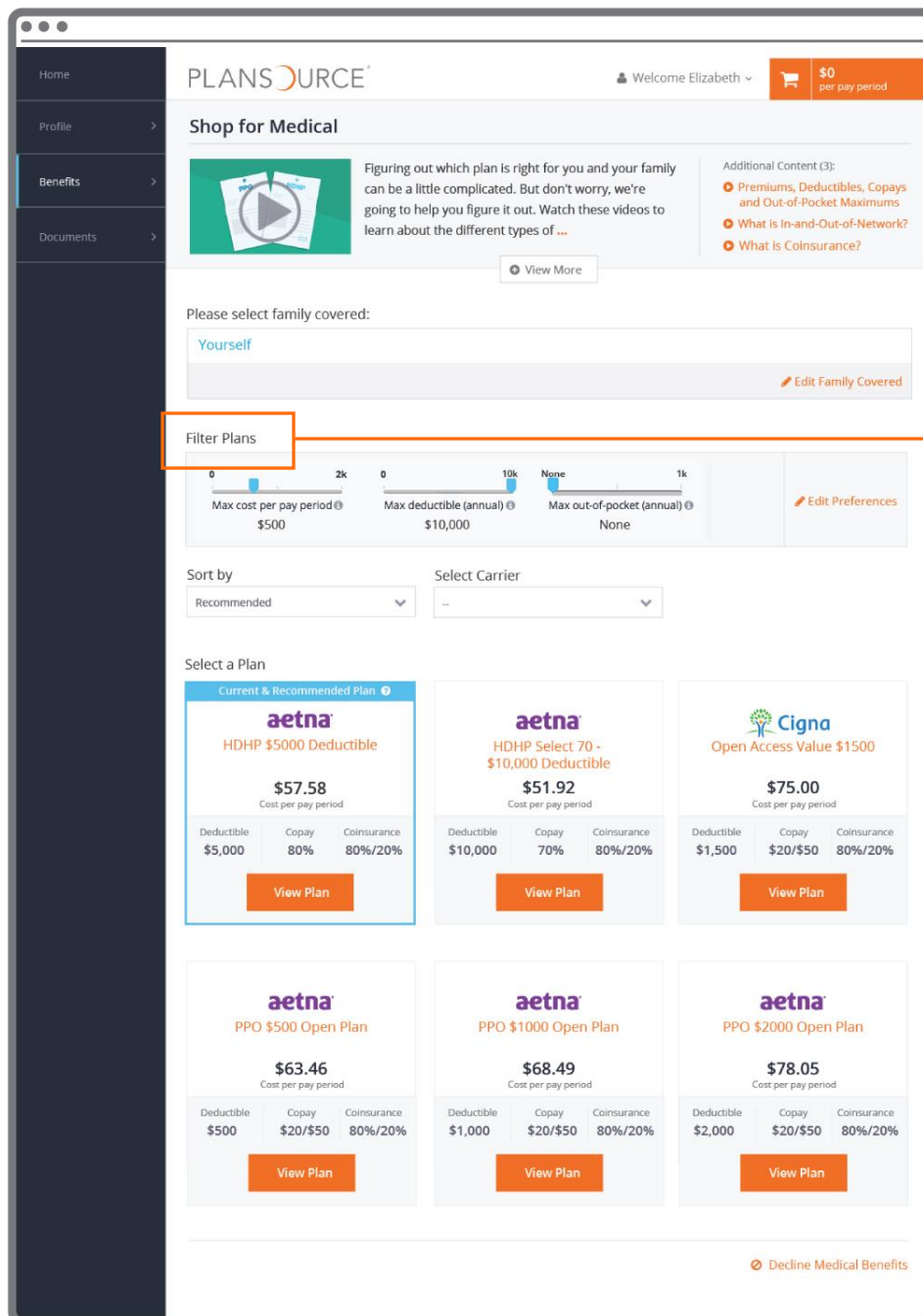

Homepage
On the Homepage, click "Get Started" to begin.

Enroll in Benefits

Profile
First, you'll be asked to review and update your profile and ensure that all information listed about yourself and your family members is correct.

Shop for Benefits
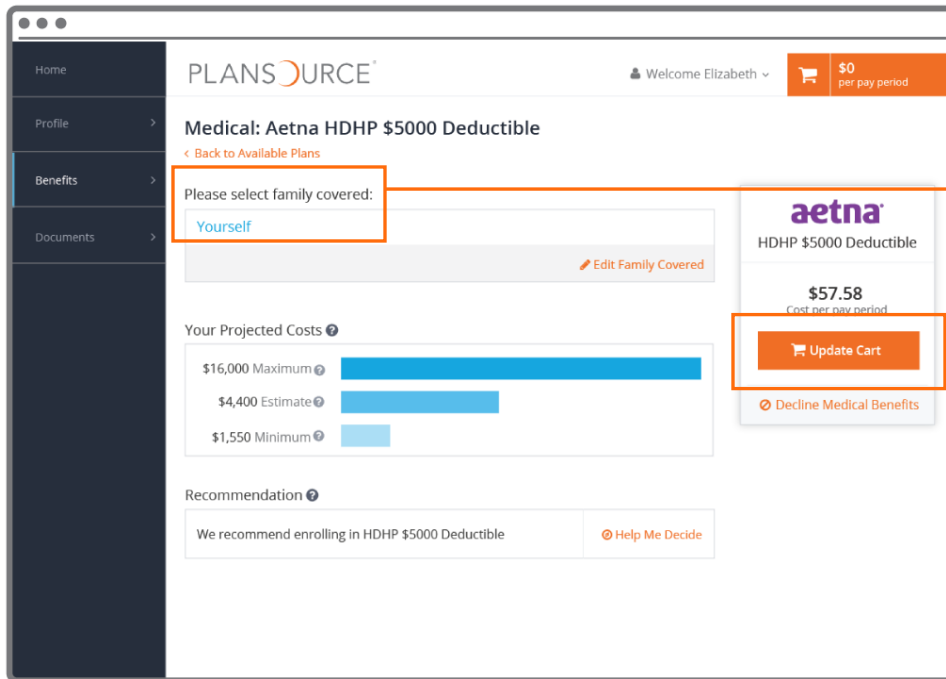You can then begin shopping for benefits!

Educational material about the specific plan type is available at the top of the page.

Filter
If your company offers three or more plans, you'll be able to filter available plans based on a variety of criteria.

Plan Overview
Plan choices are displayed on "cards," which provide a brief summary of what is included in the plan. Click a card to get more detail.
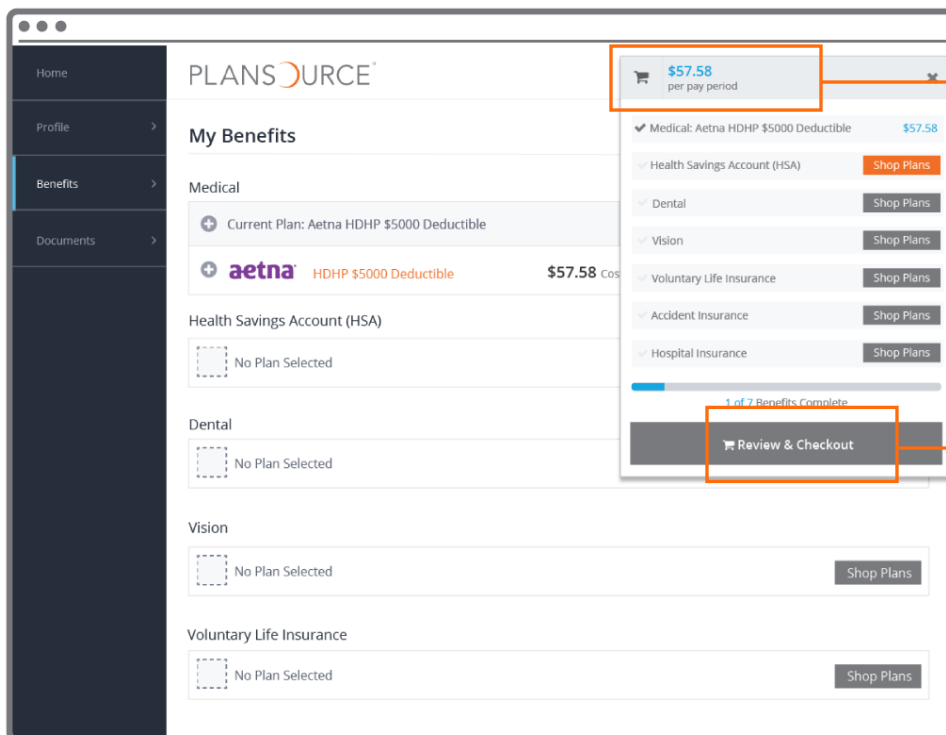
Plan Details
The plan detail page will give you information about each plan.
Contact your district for costs.

Select 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 be on the plan.
Click "Update Cart" to choose the plan.

Shopping Cart
The shopping cart displays your choices.

You will need to select or decline a plan in each benefit type before you can check out.

Checkout
To finalize your choices, click "Review and Checkout." You must complete the checkout process in order to be enrolled in benefits.