

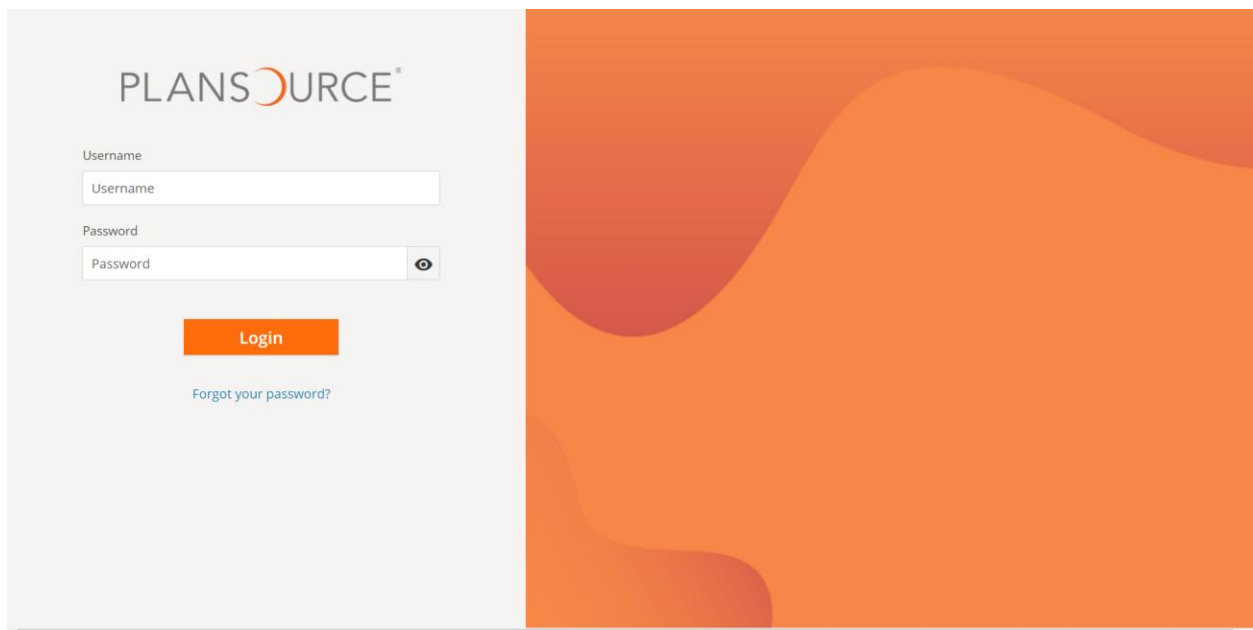
BENEFICIARY CHANGE

Please see below for instructions on how to complete a beneficiary change. Beneficiary changes can be initiated at any time, regardless of open enrollment time frames.

The link to get to PlanSource is: <https://benefits.plansource.com/logon> (This link can also be found on the CMH Intranet under Employee Info > Employee Benefits > Employee Benefits)


Once you get to the logon page, it will ask for your User ID and your password. Your User ID will be you're the first initial of your first name, up to 6 letters of your last name (or your whole last name if you do not have 6 letters), and the last four of your social. Hopefully you will know your password. If not, you can always click "Forgot your Password."

If you have never logged onto the PlanSource website, your password will be your date of birth in the following format: YYYYMMDD



PLANSOURCE®

Username

Password
 

Login

[Forgot your password?](#)

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Next you will log into the website. The homepage looks like this:

The screenshot shows the CMH website homepage. On the left is a dark sidebar menu with options: Home, Profile, My Profile, My Family, My Beneficiaries (circled in green), My Devices, My ID Cards, Contacts, Benefits, and Documents. The main content area features the CMH logo, a welcome message, and a button to 'Update My Benefits'. Below this is a section titled 'Need to update your current benefits?' with a pencil icon and a 'Your To-Do List' section showing 'All Caught Up!' and 'Provide OIC - Form Meritain Health for SAVANAH POPE'.

Click "My Beneficiaries."

Scroll down the page a little, and click on the + signs next to the life insurance beneficiaries you would like to update.

The screenshot shows the 'My Beneficiaries' page. At the top, there are tabs for 'EOI Form (Evidence of Insurability)', 'OIC Form', and 'covering a spouse...'. Below these are sections for 'EOI Form' and '2021 Surcharge Certification'. The main content area is titled 'Show beneficiaries for plan year:' and has a dropdown menu set to 'Your Current Beneficiaries'. Below this is a list of four life insurance policies, each with a green plus sign in a circle next to it:

| Policy Name | Coverage Amount |
|-------------------------|------------------------------|
| Basic Employee Life | |
| Voluntary Employee Life | Coverage amount \$130,000.00 |
| Voluntary Spouse Life | Coverage amount \$65,000.00 |
| Voluntary Child Life | Coverage amount \$10,000.00 |

At the bottom of the list is a 'Back' button.

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Once the box has expanded, you will be able to edit, remove, or change the allocation amounts for the beneficiaries. Please note that if you have multiple people as beneficiaries, the primary beneficiary allocation has to equal 100% and the secondary beneficiary has to equal 100% as well. Please see the screen shot below:

The screenshot displays the CMH web portal interface for managing beneficiaries. The left sidebar contains navigation options: Home, Profile, My Profile, My Family, My Beneficiaries (selected), My Devices, My ID Cards, Contacts, Benefits, and Documents. The main content area shows the 'Your Current Beneficiaries' dropdown menu. Below this, the 'Basic Employee Life' section is visible, featuring a 'Primary Beneficiaries (Required *)' section with a 'Spouse' beneficiary listed with a 100% allocation. A '+ Add Beneficiary' button is present. A question 'Would you like to add secondary beneficiaries?' is highlighted with a green oval, with the 'Yes' radio button selected. Below this is the 'Secondary Beneficiaries (Optional)' section, which lists two 'Child' beneficiaries, each with a 50% allocation. A '+ Add Secondary Beneficiary' button is also highlighted with a green oval. The 'Allocation Total' for both sections is 100%. Below the Basic Employee Life section, 'Voluntary Employee Life' and 'Voluntary Spouse Life' sections are visible, with coverage amounts of \$130,000.00 and \$65,000.00 respectively.

Filling out this particular event **WILL NOT** allow you to change any benefit elections, as it is not considered a qualifying event. If you are needing to make benefit changes, this is not the event to fill out for election changes- it will only update your beneficiaries for any life insurances you are enrolled in, including the employer paid life insurance.

If you have any questions, please contact the Benefits Specialist in the Human Resources department.