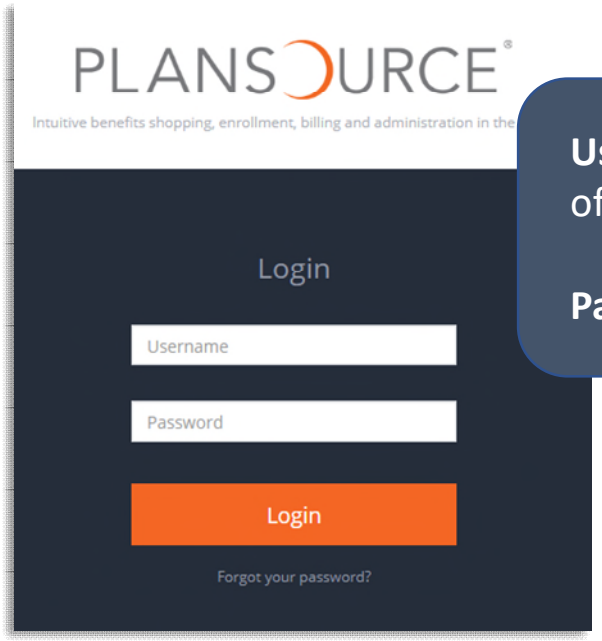
Nassau County School District

PlanSource Guide

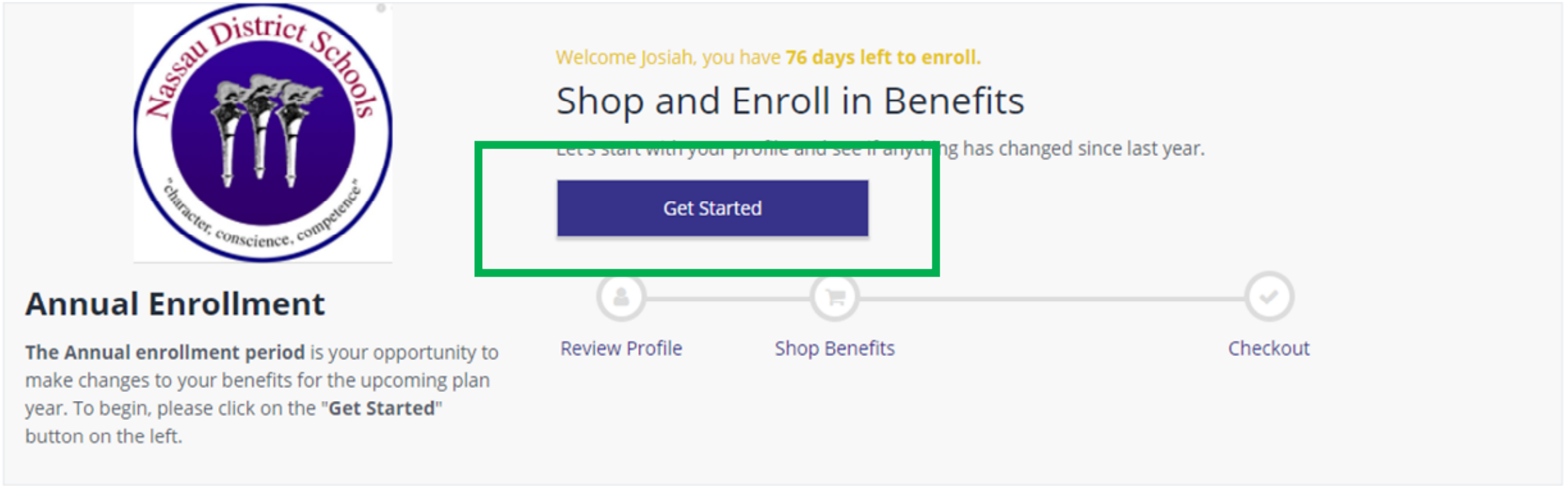
Login at: https://benefits.plansource.com/



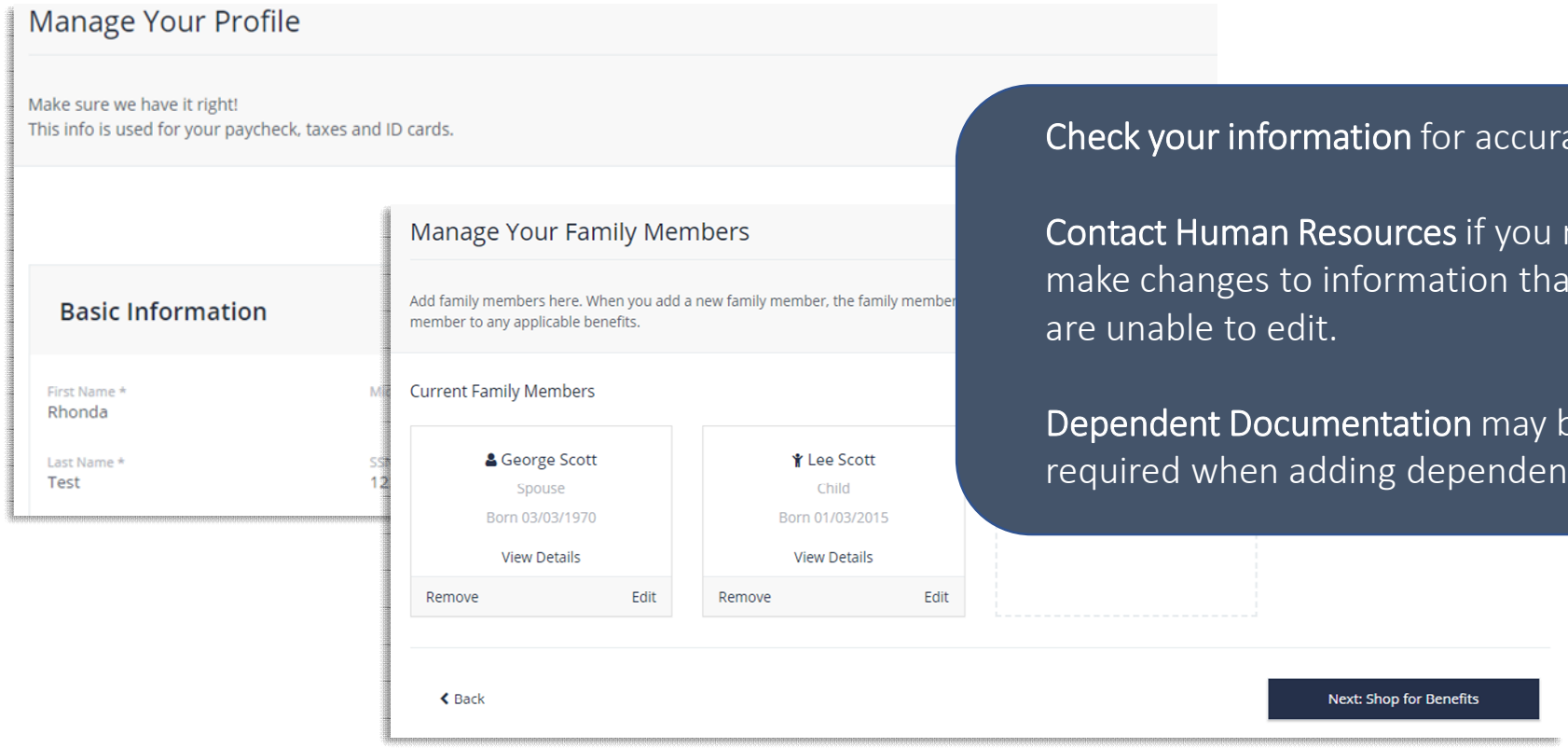
User Name: First initial, first six letters of last name, last four of Social Security Number (ssmith1234)

Password: Date of birth (YYYYMMDD)

Select “Get Started”



Step 1: Review Your Profile & Family Members



Check your information for accuracy.

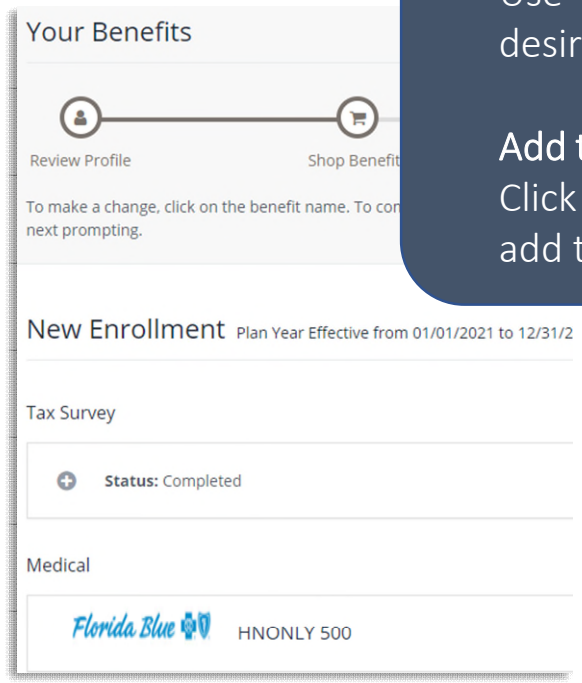
Contact Human Resources if you need to make changes to information that you are unable to edit.

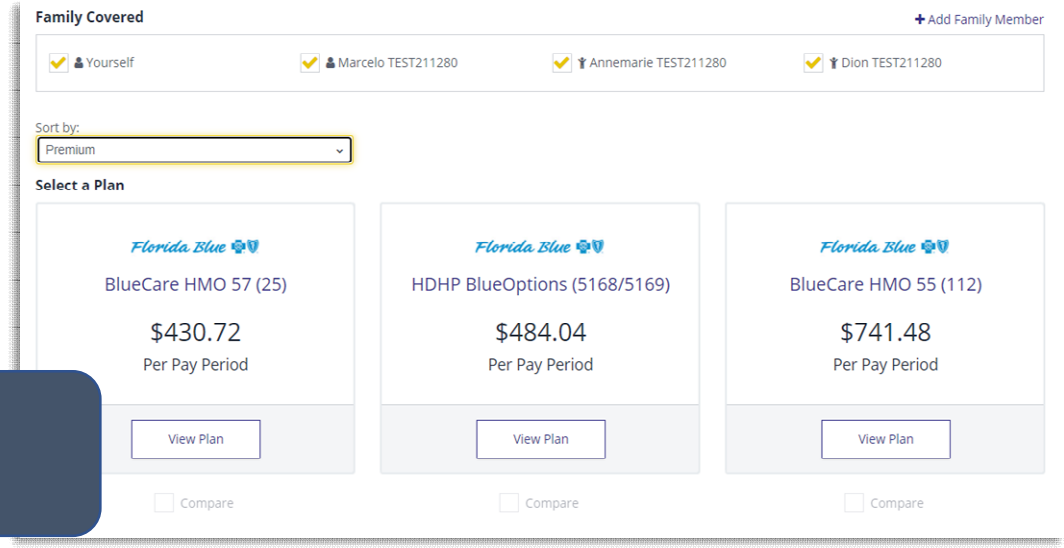
Dependent Documentation may be required when adding dependents.

Step 2: Shop for your benefits

Use **“Shop Plans”** button next to each benefit type. Choose your desired election or decline the benefit.

Add the plan to your cart.
Click “**View Plan**” to view the desired plan, then “Update Cart” to add the selected plan to your cart.

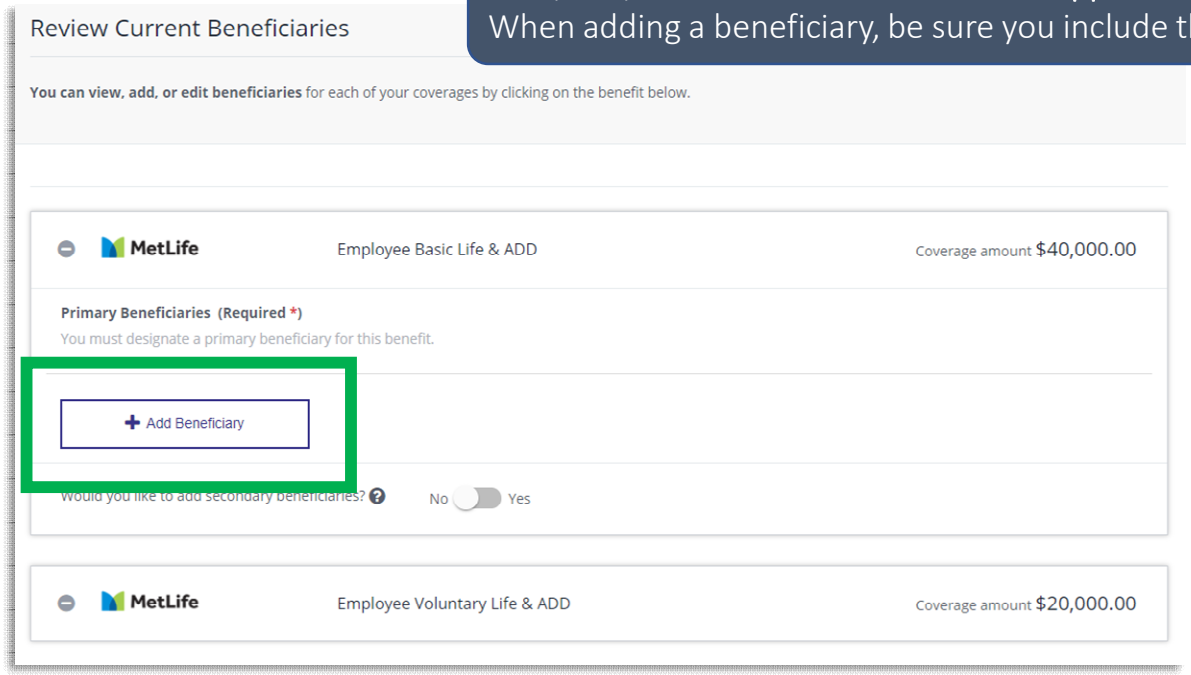


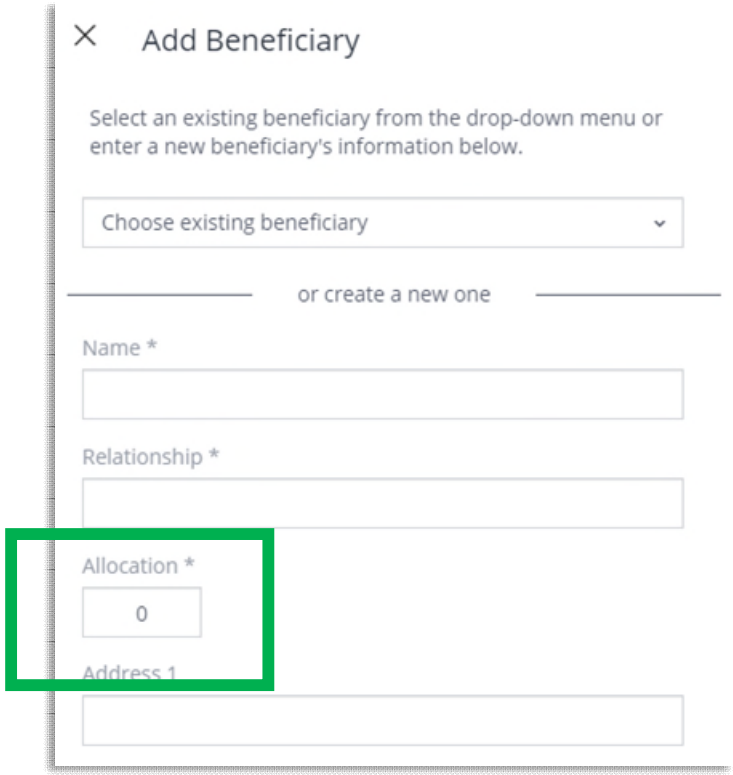


Click “**Next: Review Beneficiaries**” to move to the next step of entering in beneficiary information.

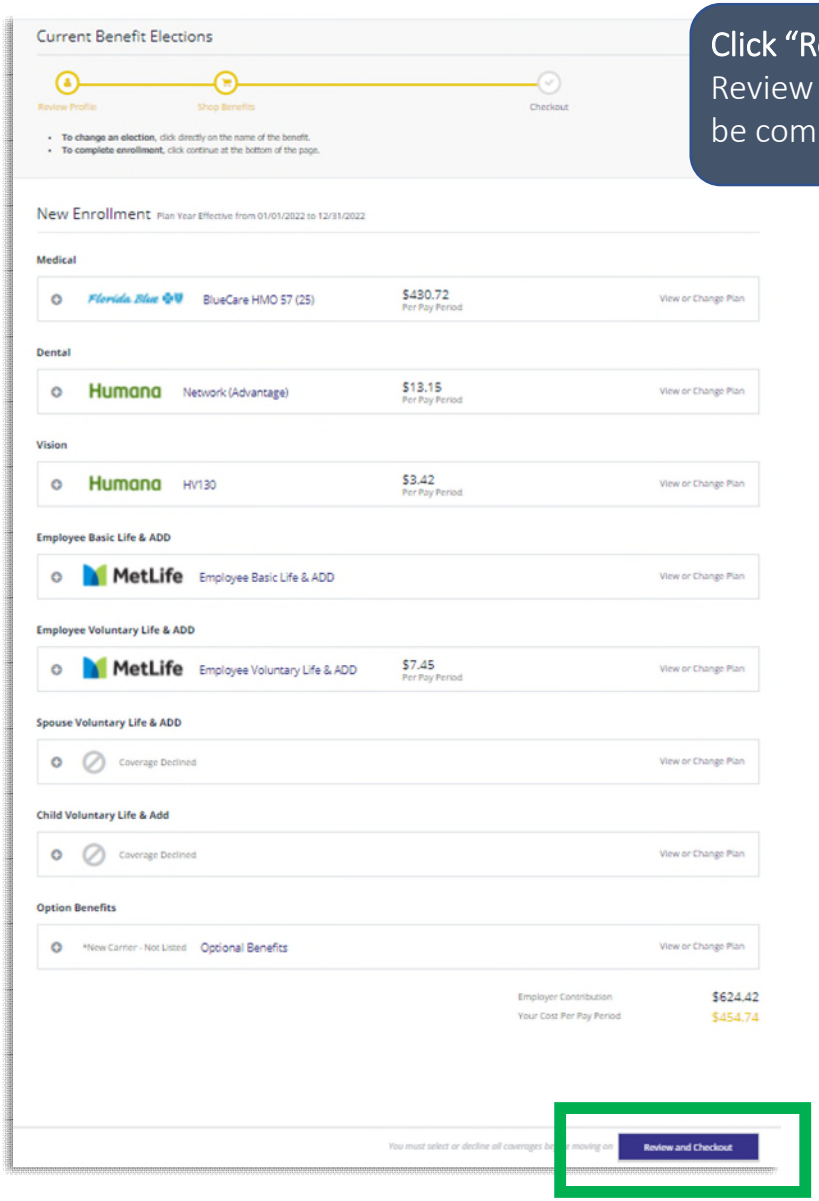
Step 3: Review your beneficiaries

View, add, or edit beneficiaries for each applicable coverage.
When adding a beneficiary, be sure you include the allocation percentage.



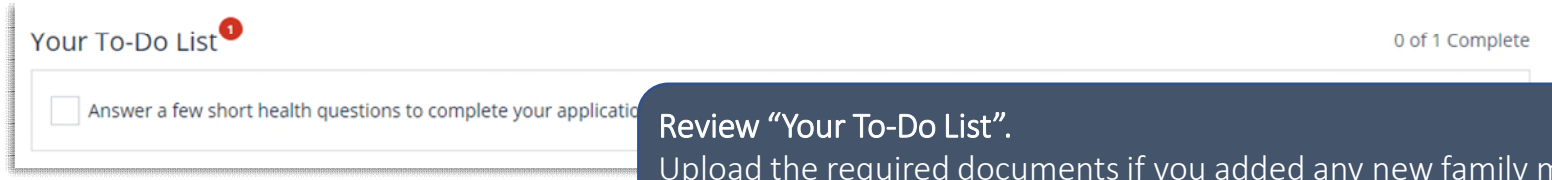


Step 4: Checkout

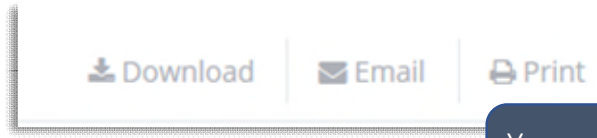


Click “Review and Checkout”.
Review for accuracy and choose “Checkout”. Your benefit election will **not** be complete until you hit the “Checkout” button.

Step 5: Documentation



Review “Your To-Do List”.
Upload the required documents if you added any new family members to your coverage or answer EOI questions.



You can download a copy of your **Benefits Confirmation Statement (BCS)** or you can email a copy to yourself or print a copy for your records.