

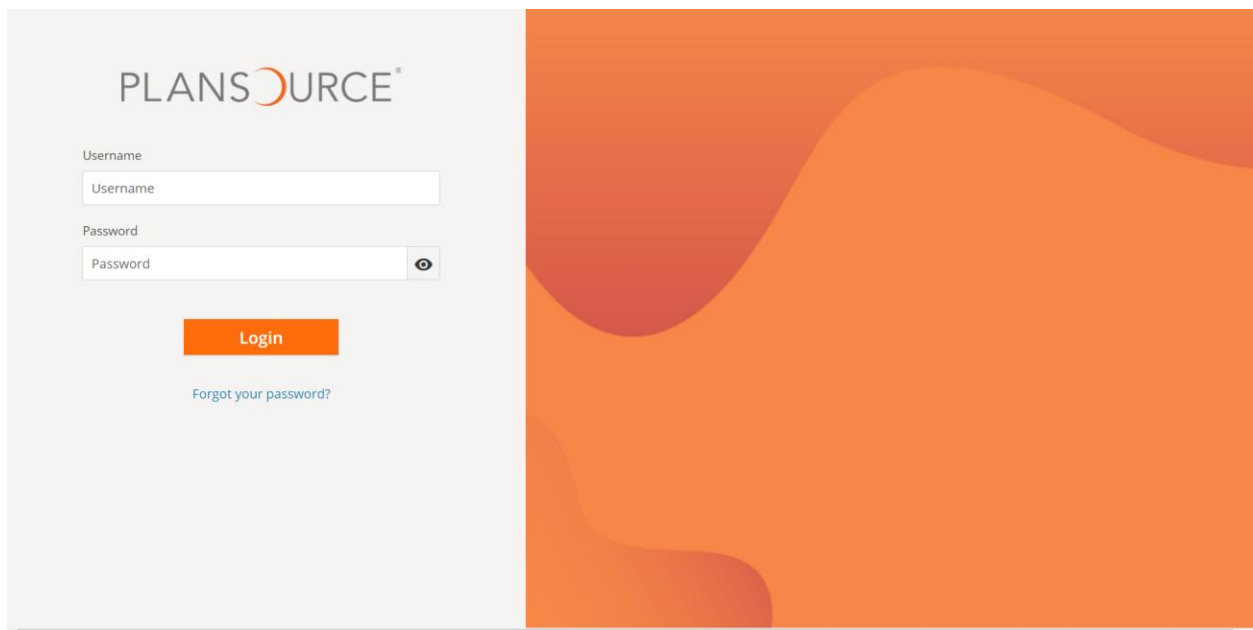
## BENEFICIARY CHANGE

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?](#)

## BENEFICIARY CHANGE

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

Home × **cmh** Welcome [redacted] \$398.13 Per Pay Period

Profile  
My Profile  
My Family  
**My Beneficiaries**  
My Devices  
My ID Cards  
Contacts

Benefits >  
Documents >

Welcome [redacted]  
**Welcome!**  
To review current benefits, update beneficiaries, or verify your personal information, choose an option from the menu on the left.  
Click the link below to initiate a change to your current benefits.  
**Update My Benefits**  
Or you can review your current benefits

**Need to update your current benefits?**  
Have you had a qualifying life event such as a new addition to your family?  
Update your current benefits.

Your To-Do List 1 of 1 Complete

- All Caught Up!  
Hide your 1 completed tasks
- Provide OIC - Form Meritain Health for SAVANAH POPE Accepted

<https://benefits.plansource.com/subscribe/home>

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.

Home × **cmh** Welcome [redacted] \$398.13 Per Pay Period

**EOI Form** (Evidence of Insurability)  
EOI  
EOI Form

**OIC Form**  
OIC Form

**covering a spouse...**  
2021 Surcharge Certification  
2021 Surcharge Certification

Show beneficiaries for plan year:  
Your Current Beneficiaries Download Print

- INSURANCE STANDARD** Basic Employee Life
- INSURANCE STANDARD** Voluntary Employee Life Coverage amount **\$130,000.00**
- INSURANCE STANDARD** Voluntary Spouse Life Coverage amount **\$65,000.00**
- INSURANCE STANDARD** Voluntary Child Life Coverage amount **\$10,000.00**

[← Back](#)

## BENEFICIARY CHANGE

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 'Basic Employee Life' section of the CMH employee benefits portal. The interface includes a navigation menu on the left with options like Home, Profile, My Profile, My Family, My Beneficiaries, My Devices, My ID Cards, Contacts, Benefits, and Documents. The main content area shows the 'Your Current Beneficiaries' dropdown and a 'Download' button. Below this, the 'Basic Employee Life' section is expanded, showing 'Primary Beneficiaries (Required \*)' with a 'Spouse' listed at 100% allocation. A '+ Add Beneficiary' button is visible. A question 'Would you like to add secondary beneficiaries?' is highlighted with a green circle, with 'No' selected. Below this, 'Secondary Beneficiaries (Optional)' are listed, including two 'Child' entries at 50% allocation each. A '+ Add Secondary Beneficiary' button is also highlighted with a green circle. The 'Allocation Total' for both primary and secondary beneficiaries is shown as 100%. Below the main section, 'Voluntary Employee Life' and 'Voluntary Spouse Life' are listed with their respective coverage amounts: \$130,000.00 and \$65,000.00.

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.