

Open Enrollment Step-by-Step

Use this guide to complete Open Enrollment in PlanSource.

Before you begin: Have your dependent and beneficiary information available. Open Enrollment generally takes 12-20 minutes to complete.

STEP 1 Log in to PlanSource

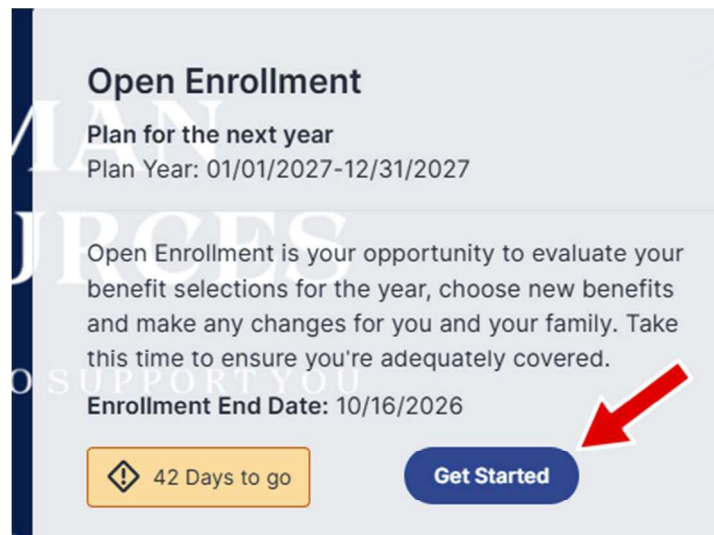
Access [PlanSource](https://thesource.plansource.com/westvalleymissioncommunity/login): <https://thesource.plansource.com/westvalleymissioncommunity/login>.

- **Username:** Banner ID (G0 + employee ID)
- **Temporary password:** Date of birth (YYYYMMDD)

At first login, create and save a new password.

STEP 2 Start Open Enrollment

On the Open Enrollment tile, select Get Started.



STEP 3 Review the enrollment reminders

Review Before You Get Started, then select Start Enrollment.

Before You Get Started



Be Prepared

Have on hand your dependent and benefit information.



Time To Enroll

It typically takes about 12 to 20 minutes to enroll.



Just In Case

If you need to take a break, that's fine; simply pick up where you left off to complete your enrollment.

Start Enrollment

STEP 4 Add / Update Family Members

****If you are not adding or editing family members, skip to Step 6.****

Select My Family.

Review your family members. To add one, select Add Family Member.

✓ MY PROFILE

✓ MY FAMILY

Manage My Family

View, add, update, or remove dependents in this section. When adding a new family member, please note that they will not be automatically enrolled in your benefits. Be sure to include them in any applicable coverage selections.

Please note: Only certain states allow domestic partners to be registered:

[Learn More](#)



Faustino RK

Spouse
Born 01/01/1980

Remove

Edit



Mateo RK

Child
Born 02/12/2012

Remove

Edit

[+ Add Family Member](#)

STEP 5 Add or update a family member

Complete all required (*) fields.

Add Family Member

Select Avatar

All fields marked with an asterisk (*) are required.

Basic Information

First Name*

Luke

Last Name*

Skywalker

Birthdate*

05/04/2026



SSN*

111-11-1111

Gender*

Male



Relationship*

Step Child



Select Save.

Important: This step adds the dependent's information only, it does not enroll them in any benefit plan. You will choose which dependents to cover when you reach each benefit election (beginning at step 6).

STEP 6 Continue to your benefits

Select Let's Continue.

Let's Continue →

STEP 7 Choose a benefit to review

Select Explore next to each benefit you want to review or change.

Select Your Benefits

Your **benefit enrollment** is a step-by-step process that will allow you to review information for each benefit and then decide what level of coverage you would like to enroll in. You will be able to see your per pay period cost along the way and at the end you will receive a confirmation statement listing all your elections. This statement can be printed for your records or emailed to a specified address.

[Learn More](#)

BENEFITS		\$0.00
Medical - No Coverage Important: The amount shown for this medical plan does not yet include your... Learn More		\$0.00 Per Pay Period Explore
Flexible Spending Account - No Coverage A Health Flexible Spending Account (FSA) is a great idea to save a bit of money whi... Learn More		\$0.00 Per Pay Period Explore
Dependent Care Reimbursement Account - No Coverage How Does a Dependent Care Reimbursement Account Work? A... Learn More		\$0.00 Per Pay Period Explore

Annual re-enrollment: Flexible Spending Accounts (FSA) and Dependent Care Reimbursement Accounts (DCFSA) require a new election each year.

STEP 8 Choose who to cover and select a plan

For medical, select each family member you want to cover.

To keep your plan, select Keep This Plan.



To change plans, select Choose Plan next to the new plan.



Waiving medical coverage to receive cash-in-lieu: If you are opting out of medical coverage, make sure every listed family member is unchecked.

STEP 9 Complete each benefit election

Review your current election and available options for each benefit.

- To keep your current coverage, select Keep This Plan.

Keep This Plan

- If you do not want coverage, select Decline Coverage.

Decline Coverage

After making your election, select Looks Good, Continue.

Looks Good, Continue

STEP 10 Open the beneficiary section

Select the beneficiary box.



Add Your Beneficiaries

Protect your family's financial well-being by adding beneficiaries to your benefit coverages.

 3/3 complete

*Required

STEP 11 Assign beneficiaries

Assign primary beneficiaries. Secondary beneficiaries are optional.

Make sure each category totals 100%.

Select Looks Good, Continue.

Looks Good, Continue

Basic Employee Life

Coverage amount: \$50,000.00

Primary Beneficiaries*

You must designate a primary beneficiary for this benefit.

Faustino RK	100 %	Edit	Delete
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+ Add Beneficiary

Total: 100%
✓ Allocations saved successfully

Would You Like To Add Secondary Beneficiaries?

Secondary beneficiaries receive the benefit if the primary beneficiaries are no longer alive or can't be found. As with primary beneficiary allocation, multiple secondary beneficiaries may be designated. Designating secondary beneficiaries is not a requirement, but is strongly encouraged.

+ Add Beneficiary

STEP 12 Review your elections

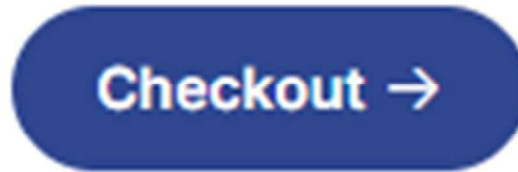
Review your benefits and covered dependents.

To edit a benefit, select View / Change.



STEP 13 Check out and confirm

Select Checkout, then complete the confirmation prompts.



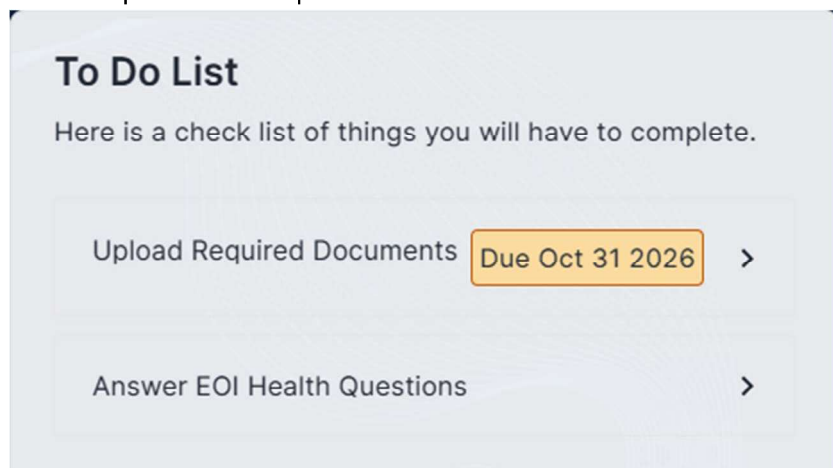
STEP 14 Save your confirmation statement

Download or email your confirmation statement. Review it and save a copy.

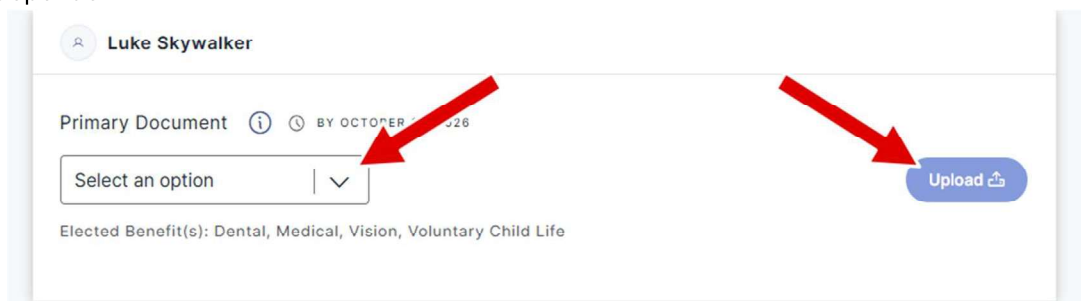
Final check: Your enrollment is not complete until you have checked out and received access to your confirmation statement.

STEP 15 Complete the items in your To Do List

Review your To Do List for required follow-up.



For new dependents, select the document type and upload the required verification by the due date. Repeat for each dependent.



If required, complete the Evidence of Insurability (EOI) form for new or increased voluntary life or AD&D coverage.

Done!