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PlanSource Self-Guided Tour

Enrolling In Benefits

If you are a benefit eligible associate of Compass Group Support Services you will need to go to CGSS’s Online Enrollment System (PlanSource) 1 week after you receive your first full paycheck to elect your benefits. Every benefit eligible associate must logon regardless if you are waiving any or all coverage. If you cannot logon to the system during this time period please contact the benefits department immediately at one of the phone numbers listed on the bottom of the page or by emailing us at sus-benefits@compass-usa.com.

Before you begin please make sure you have the following items:

- Social Security Number (SSN) for all legal dependents you wish to enroll in any coverage.
- Date of Birth (DOB) for all legal dependents you wish to enroll in any coverage.
- Beneficiary Information for Life Insurance, which includes your beneficiaries’ name(s), DOB(s) and SSN(s)

Logging On

Type in www.crothall.com/benefits into the address bar of your internet browser

Select the Click Here to Login link
If this is the first time you are using this site follow the instructions below for your user name and Password.

Your **Username** consists of:
1. First initial of your First Name;
2. First initial of your Last Name;
3. First 4 Digits of your Date of Birth in the format MMDD;
4. Last four (4) digits of your SSN.

Example: John Doe, whose Date of Birth is 12/05/1980 and SSN is 000-00-1234, would have a login of JD12051234.

Your **Password** is your birthdate in this format, YYYYMMDD (unless you have previously changed your MyOptions password).

Example: a birthdate of February 7, 1975 would look like this: 19750207.

First time users will be prompted to select a new Password

**Please note:** Every year during Open Enrollment your password will reset back to your birthdate in the YYYYMMDD format.
Welcome Screen
On this screen you will have the option to view benefits, providers, see past enrollments, etc. First we will go through the Enrollment Process; later in this document we will review steps to update enrollment information. Click directly on the photo under Enroll or the link “View or Change My Benefits”.

Introduction
You will be notified of the enrollment due date. You must complete your enrollment by this date. You also have until that date to re-visit www.crothall.com/benefits to make any changes to your enrollment if necessary. Failure to enroll by the enrollment due date will result in “NO COVERAGE”.

- Read thru the page
- Click Enroll in Benefits – New Hire
(During the Annual Open Enrollment period this will say Enroll in Benefits – Open Enrollment. If you are not a new hire and it is not Open Enrollment, there will be a link that says Report a Life Event.)
Beginning the Enrollment
On each of the enrollment pages there is a Total Benefit Cost per pay period in the upper left hand side of the enrollment screen.

Please note: It is necessary to use the continue button at the bottom of every page to access the next enrollment step.

About You

- Read thru this page and verify that all information is correct – if not contact the Benefit Department.
- A Primary email address is required
- Any contact phone number must be provided in the cell field.
About Your Dependents

Any dependents (i.e. Spouse, Partner, and Child) need to be entered on this page. To enter a new dependent not currently listed on the page:

- Click **Add Dependent**
- Enter **Dependent Information** (including SSN and DOB)
- Click on Dependent Relationship drop down box and choose appropriate relationship
- If the dependent does not live at home, uncheck the “Dependent Lives at Home” box and add the address
- Click **Continue**
To edit a dependent listed on the page:

- Click on the first name of the dependent
- Correct the dependent information
- Click Continue

To delete a dependent listed on the page:

- Click Remove link at the end of the dependent record
- Click ok when asked if you are sure you wish to terminate this dependent

- The red warning is a reminder that you must continue through the enrollment to verify your benefits and coverage levels.
To reactivate a dependent listed on the page:

- Click Activate link at the end of the dependent record

Once you have added and/or edited all dependents:

- Click Continue

**Benefits Preview**

If you are a brand new associate this page will indicate that you have not confirmed or updated your elections

- To begin making elections click on the first benefit in the list

If you are not a new associate and you are going through enrollment due to a life status change or open enrollment then this page should list your current coverage with CGSS. During Open Enrollment this page may say “no coverage” which means that your current plan will no longer be available for the new plan year and you must re-elect.
ELECTING A PLAN

For each benefit - all the plans available to you are listed on this page.

- Click on the button under the plan of your choice next to the coverage level you are enrolling in.
- Choose the decline category if you are waiving coverage – using the decline option that applies to you.

Plan Content Summary

Per Pay Period Costs for each option

Dependents eligible for each benefit (if none listed - employee only benefit)

Links to find a doctor and plan details and plan documents

Checked boxes indicate which dependents will be actively covered under selected coverage level
All dependents on your employee record should be listed here. The box will be checked next to their name if they will be covered under a specific benefit. If the box next to a dependent is not checked and the system will not allow you to check it manually, you will need to verify the coverage level you have selected for the benefit.

- Click Continue

If you forgot to add a dependent you wish to cover:

- Click **Update Dependent link**
- Add Dependent(s) as described above
- Click **Continue** to return to enrolling in benefits.
- **Verify** new dependent is covered in your selected benefits.

**Enrollment Navigation**

Proceed through each enrollment page by using the continue button

Use the back button to go back to a previous page – Do not use your browser’s back button
Life Insurance Enrollment

If you receive company paid Basic Life Insurance it will be listed on this page. Please review for accuracy.

- Click Continue

Beneficiary Designation for Basic Life and Voluntary Life Elections

You must elect a Beneficiary for your company paid Basic Life/AD&D and Voluntary Life benefits. You can designate as many primary (and secondary beneficiaries) as you wish, however, the allocation for each must total 100%.

- Click Add Primary Beneficiary
- Add Beneficiary Information to the pop up box
- Click Save to close box
- Click Continue
Your Evidence of Insurability Status

Certain elections in the life benefits may require further documentation or Evidence of Insurability (EOI). This requirement will be noted next to the election amount you are requesting.

Once you have selected your coverage amount, click Continue. If an EOI required amount has been selected, you will see a pop up screen like this:

If this is shown, you are required to download the EOI Form on this pop up screen, complete it and submit it to Guardian via email at appletonbilling@glic.com or mail to PO Box 8012, Appleton, WI 54912-8012. If you have any trouble accessing this form, please email Crothall@mccbenefits.com or call 855-276-8425 to request a copy.
Flexible Spending Account – Medical

The **Medical Reimbursement Account** information available to you is listed on this page. Please read through it carefully. If you would like to enroll in this benefit, pre-tax dollars are put aside from your paycheck to pay for eligible medical expenses. To elect, please do the following:

- Click **Enrolled** button
- Type in an **Annual Amount** you would like available for the year
- Click **Ok** button to accept amount and view Per Pay Period breakdown
- Click **Continue**

If you do not wish to enroll in the Medical Reimbursement Account:
- Click **Decline** button
- Click **Continue**
Flexible Spending Account – Dependent Care
If you have any legal dependents (children) who you pay childcare expenses for you may be eligible to participate in the Dependent Care Reimbursement Account. Please read through this page and if you qualify you can enroll as follows:

- Click **Enrolled** button
- Type in an **Annual Amount** you would like available for the year
- Click **Ok** button to accept amount and view Per Pay Period breakdown
- Click **Continue**

If you do not wish to enroll in the Medical Reimbursement Account:
- Click **Decline** button
- Click **Continue**

Agreement Page
Please read through this page carefully and follow the instructions to accept then click **Continue**.
Confirmation Page

This page lists all the benefits you elected:
- Read thru the entire page carefully to verify all information is correct

Not all plans/benefits may be available for every associate. Please contact CGSS Benefits or consult with your manager if you have any questions.
To make any changes to your elections:

- Click the Enroll in Benefits link in the top left corner of the screen
- Click the benefit that needs correction (i.e. Medical, Dental, etc.)
- Make Corrections
- Click Confirm Enrollment (which will bring you back to the Benefit Confirmation Statement)

If the summary page is correct:

- Read thru Acknowledgments
- Click Confirm

**You Are Done**

- If you have provided a current email address – a copy of this confirmation statement will be emailed to you
- **Print out** a copy of your Benefit Profile using one of the icons at the top of the confirmation statement

- **Hourly Associates Only**, must sign a copy of the profile and return it to your manager
Viewing your Information at any time

At any time throughout the year you can login to your account using the Username and password you created during your new hire enrollment. If you do not remember your password contact CGSS Benefits to have your Password reset. To view your personal information or your current benefits election click on View or Change My Benefits

Click Personal Information to view your current information (please contact CGSS Benefits or your Manager if any changes need to be made)
Viewing Your Current Benefits
You can view your current benefits anytime

- Click Current Benefits Confirm
- Click Printer or PDF icon to print a paper copy of your benefits

Changing Your Beneficiary Information
You can add or change Beneficiary (ies) for your Life Insurance Plans as many times as you wish at any time throughout the year

- Click Beneficiary Changes
- Select Plan to add or change beneficiaries
If you need to add more than one beneficiary just Click **Add Primary Beneficiary** until all your beneficiaries are noted. You will however need to determine the percentage split amount amongst the beneficiaries so it adds to 100%.

To edit a **beneficiary**:  
- Click the **Name** of the Beneficiary to be updated  
- Complete **Beneficiary Information**  
- Click **Save**

To delete a **Beneficiary**:  
- Click **Remove**

**Checking Your Flex Spending Account**

You can check your **Account** at any time.
What to do if you experience a Qualifying Life Event

Some changes in your personal life may qualify you to change your benefit elections. A list of Life Event changes is on page 22 or you can call CGSS Benefits Departments with any questions.

To make a Life Status Change on PlanSource:

- Click Report Life Event

Use drop down menu to choose Life Event that best describes the reason for this change

Type in Date of Event

Please note that the Date of Event CANNOT be a future date, therefore it must be within the past 30 days or the current date.

Enter notes to explain Life Event

Click Save

This will open the enrollment process where you will be able to make changes to the benefits in accordance with the type of Life Event you are creating. Refer to the instructions beginning on page 6 of this document for assistance with the enrollment.
Qualifying Life Event Status Change Reasons and Documentation Needed

If you are making a status change at any time throughout the year you could be required to email, fax, or mail supporting documentation to the CGSS Benefits Department for your status change request to be approved. Please read through the status change reasons below and if your status change requires further documentation, you must send that documentation within 31 days of the event to CGSS Benefits Department, or your request will automatically be denied.

<table>
<thead>
<tr>
<th>Event</th>
<th>Documentation Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marriage</td>
<td>Marriage Certificate</td>
</tr>
<tr>
<td>Divorce</td>
<td>Divorce Decree</td>
</tr>
<tr>
<td>Legal Separation</td>
<td>Legal Separation Decree</td>
</tr>
<tr>
<td>Death of spouse or child</td>
<td>Death Certificate</td>
</tr>
<tr>
<td>Birth</td>
<td>None</td>
</tr>
<tr>
<td>Adoption, gain tax dependent</td>
<td>Adoption Paperwork signed by Judge</td>
</tr>
<tr>
<td>Spouse commenced employment</td>
<td>Paperwork from new employer showing your new benefit coverage and date that coverage will begin</td>
</tr>
<tr>
<td>Spouse terminated employment</td>
<td>HIPAA Certificate from previous carrier</td>
</tr>
<tr>
<td>Medicaid or Medicare Change</td>
<td>Paperwork showing add or termination of Medicaid or Medicare for you or any dependent</td>
</tr>
<tr>
<td>Dependent has a change in SCHIP (State Children's Health Insurance Program) status</td>
<td>Notification from CHIP stating the changes/dates</td>
</tr>
</tbody>
</table>

Compass Group Support Services
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