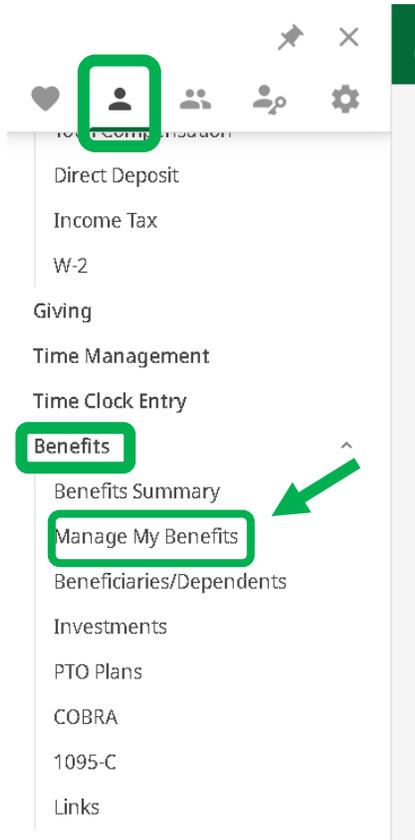
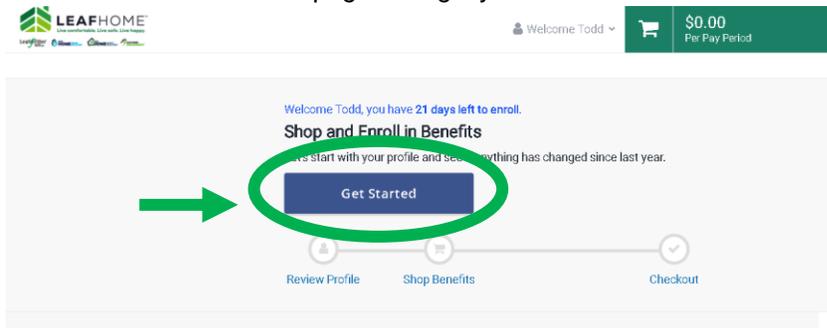


# PlanSource 101

1. Log Into UKG via a desktop, laptop, or mobile app to get started. If using a web browser, be sure to use the Leaf specific link to access: <https://ew43.ultipro.com>
2. Once in UKG, navigate to Menu > Myself > Benefits > Manage My Benefits.



3. You'll be directed to the PlanSource home page to begin your enrollment! Click "Get Started".



# PlanSource 101

4. Review your personal information for accuracy. When finished, click “Next: Review My Family”

LEAFHOME  
Welcome Todd | \$0.00 Per Pay Period

### Manage your profile

Make sure we have it right!

This info is used for your benefit ID cards. If you have any adjustments, please click the "Menu" button on the top left of your screen and select the "Employee Summary" under the "Personal" heading.

If any of the information is incorrect and you are unable to change it as part of enrollment, please contact the Benefits Team.

[EDIT INFO](#)

Basic Information		Contact Information	
First Name*	Middle Name	Address 1*	Address 2
Todd		1761 michéalwood ct	
Last Name*	SSN*	City*	State*
Test11	999-04-6269	St Charles	Missouri
Personal Information		Zip*	Country
		63303	United States
		Home Phone	Office Phone



Next: Review My Family

5. Add your Dependents! Click “Add Family Member”. Please be sure to include their Name, DOB, Gender, and SSN to link them to plans throughout the enrollment process. Click “Save” when finished. You will need to do this for each dependent you are adding. When finished, click “Next: Shop for Benefits”.

LEAFHOME  
Welcome Todd | \$0.00 Per Pay Period

### Manage your family members

View, add, edit or remove dependents here.

Please confirm that all information for your dependents listed is correct (including Social Security numbers, and date of birth).

If you add a new family member, the family member won't be added to your benefits automatically. You will still need to add the family member to any applicable benefits throughout the enrollment process. Dependents must be listed on this page to be a visible dependent option throughout the enrollment.

You may:

- Add New Dependents
- Edit Existing Dependent Information
- Remove Existing Dependent

By adding a dependent, you are confirming that this is a legal spouse eligible for coverage per our working spouse provision, or eligible child dependent.

Current Family Members

[+ Add Family Member](#)

# PlanSource 101

### Basic Info

First Name *	Middle Name
Last Name *	SSN *
Select Gender *	Birthdate * 
Select Relationship *	

6. If you have a spouse listed, you'll begin with the "Working Spouse Provision Acknowledgment" by clicking "Start Survey". This will help determine your spouse's eligibility to be added to the plan. Download the "Working Spouse Provision Form" for completion if applicable. You'll have the ability to upload the completed document at the end of the enrollment.

### Working Spouse Provision Acknowledgement

[Additional Content \(1\): Working Spouse Provision Form](#)

Question 1 of 1

If your spouse is employed and offered medical, dental, and vision coverage through their employer, your spouse is not eligible for coverage under the Leaf Home plans. In order to determine if your spouse can be covered under the Leaf Home plans, please fill out the Working Spouse Provision Form (linked above for download).

**Subscriber:** Todd Test11

My spouse is employed and benefit eligible and I understand that dependent spouse benefits are not available through Leaf Home benefit plans in this case and my spouse will be removed from all Leaf Home benefit coverage.

Both myself and spouse are employed with Leaf Home, the working spouse provision may not apply in this case

My spouse is not currently employed

My spouse is employed, but is either not benefit eligible or the employer does not offer benefits (including self-employed)

do not have a spouse

# PlanSource 101

7. Once you complete the “Working Spouse Provision Acknowledgement”, or if you are not subject to the acknowledgment, you’ll be led through the rest of the enrollment. When making your selections, be sure the dependents you’d like covered are checked under “Family Covered” for each page of the enrollment. You can customize coverage as you’d like! The system will automatically show your coverage tier based on whom you’d like enrolled in each plan. When you’re ready to confirm, click “Update Cart” to add your selections to the enrollment. If you’d like to decline certain coverages, simply hit “Decline” to be led to the next part of the enrollment.

a. **PLEASE NOTE: Your healthcare (medical, dental, vision) elections will be pended if you are enrolling dependents until verification documents are received. You will not see these premium costs reflected in your cart until verification documents are received.**

The screenshot shows the enrollment interface. On the left, a table lists coverage options under the heading "Family Covered". On the right, a summary card for "DELTA DENTAL" shows a cost of "\$5.75 Per Pay Period" and two buttons: "Update Cart" and "Decline Coverage".

Family Covered		ADD FAMILY MEMBER
<input checked="" type="checkbox"/>	Person icon	Yourself
<input checked="" type="checkbox"/>	Person icon	Todd SPOUSE
<input checked="" type="checkbox"/>	Person icon	Todd CHILD

Employee Only	\$0.00 Per Pay Period
Employee + Spouse	\$2.35 Per Pay Period
Employee + Children	\$2.85 Per Pay Period
Employee + Family	\$5.75 Per Pay Period

DELTA DENTAL

Dental

\$5.75  
Per Pay Period

Update Cart

Decline Coverage

8. At the top of each benefit page, you’ll find additional information about the benefit/plan you are evaluating! Not sure if the plan is right for you? Use this information to help make an informed decision!
9. Basic Life and AD+D are mandatory elections! These plans are both standard \$25k policies that are 100% employer paid and come at no cost to you. Simply click “Update Cart” to add these to your enrollment.

Two screenshots of benefit cards from Lincoln Financial Group. The left card is for "Basic Employee Life" and the right card is for "Basic AD&D". Both cards show a cost of "\$0.00 Per Pay Period" and a green "Update Cart" button.

Lincoln Financial Group

Basic Employee Life

\$0.00  
Per Pay Period

Update Cart

Lincoln Financial Group

Basic AD&D

\$0.00  
Per Pay Period

Update Cart

10. Once the enrollment is complete, click “Next: Review Beneficiaries”. On this page, you can either add a new beneficiary, or make existing dependents beneficiaries, for your life policies! Apply the same beneficiary to all plans or customize them to your liking. Remember: anyone can be your beneficiary (friend, spouse, parent, child, etc.)! When you’re finished, click “Review and Check Out”.

You must select or decline all coverages before moving on.

Next: Review Beneficiaries

# PlanSource 101

Lincoln Financial Group Basic Employee Life Coverage amount \$25,000.00

**Primary Beneficiaries (Required\*)**  
You must designate a primary beneficiary for this benefit.

**+ Add Beneficiary**

Would you like to add secondary beneficiaries?  No  Yes

**X Add Beneficiary**

Select an existing beneficiary from the drop-down menu or enter a new beneficiary's information below.

Choose existing beneficiary

or create a new one

Name \*  
TEST BENEFICIARY

Relationship \*  
FRIEND

Allocation \*  
100

Address 1

Address 2

City

State

Zip Code

Add to all benefits

Optional "Add to all benefits" feature!

Add CANCEL Add CANCEL



11. You'll then be led to the checkout page. Here, you will be able to review all your elections. Once you confirm that all elections look correct, click "Checkout" to finalize.



12. Once you click "Checkout", you'll be led to a confirmation page. Here, you can email yourself confirmation of elections or download the PDF version for your records. If you have any pending documentation requirements, such as a marriage or birth certificate, or the working spouse form, you'll also see those requirements show up. You can also view this at any time under the "Documents" tab. Please note that these must be submitted within 30 days of your submission. Failure to provide will result in dependents being dropped from your elections.

# PlanSource 101

## Current Benefit Elections

### Enrollment Complete!

You have completed the open enrollment process and confirmed your benefits.

Need a copy of your benefits confirmation statement?

Send by Email



Review Profile



Shop Benefits



Checkout

The coverage details listed below are the current active elections on file for you and your dependents.

1. To change an election, click directly on the name of the benefit.
2. To complete enrollment, click continue at the bottom of the page.

- If you believe there is an error in your statement, please contact the [Benefits Team](#).
- If you need to make changes due to a qualifying life event, please click on the Life Event link.

Click on the icons below to print your confirmation statement or generate a PDF file.

Your To-Do List <sup>2</sup>

0 of 2 Complete

Upload the required document for Todd CHILD by June 22 2023

Open



Upload the required document for Todd SPOUSE by June 22 2023

Open



The screenshot shows the LEAFHOME PlanSource 101 interface. The top navigation bar includes a home icon, the LEAFHOME logo, a user profile dropdown for 'Welcome Todd', and a shopping cart icon with a balance of '\$123.07 Per Pay Period'. The main content area displays the 'Enrollment Complete!' message, a progress bar with 'Review Profile', 'Shop Benefits', and 'Checkout' steps, and a 'Your To-Do List' section with two items: 'Upload the required document for Todd CHILD by June 22 2023' and 'Upload the required document for Todd SPOUSE by June 22 2023'. A sidebar menu on the left contains 'Home', 'Profile', 'Benefits', 'Open Enrollment', and 'Documents' (with a red notification icon and '2 Documents Required'). The 'Documents' menu item is highlighted with a green box.

Questions? Contact the Benefits Team at [benefits@leafhome.com](mailto:benefits@leafhome.com)