



trinet

Get ready, get set and go

TriNet's Benefits Enrollment Platform powered by PlanSource

a guide to getting started

October 2023 Talent Management Learning & Development & Corporate Benefits
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Have you heard?

Benefits enrollment for the 2024 plan year is here! We're excited to offer the same great **medical, dental, vision and pharmacy benefits** for open enrollment!

As a reminder, we've **moved all benefits enrollment to PlanSource** for all TriNet USA colleagues, including all medical, dental and vision options. In addition, PlanSource will continue to be the **FSA, HSA and commuter administrator**.

Since this is our second year with PlanSource, most of your current elections will rollover to the 2024 benefits plan year. However, we encourage all colleagues to review and submit.

Keep in mind that FSA, HSA and commuter elections do not roll over year-to-year. That means you'll need to review and elect should you wish to continue these into 2024. Refer to the enrollment communications for more details.



Step

1

GET READY.

Review current benefits.

First, review your **current plan year benefits information**.
This makes electing plans easier for 2024.

1. Log in to the [People Platform \(Oracle\)](#).
2. Go to the **Benefits Enrollment Site**
(look for the Orange Icon on the main page).
3. Select the link to **review your current benefits** to see your 2023 Confirmation Statement.



Important tip to remember:

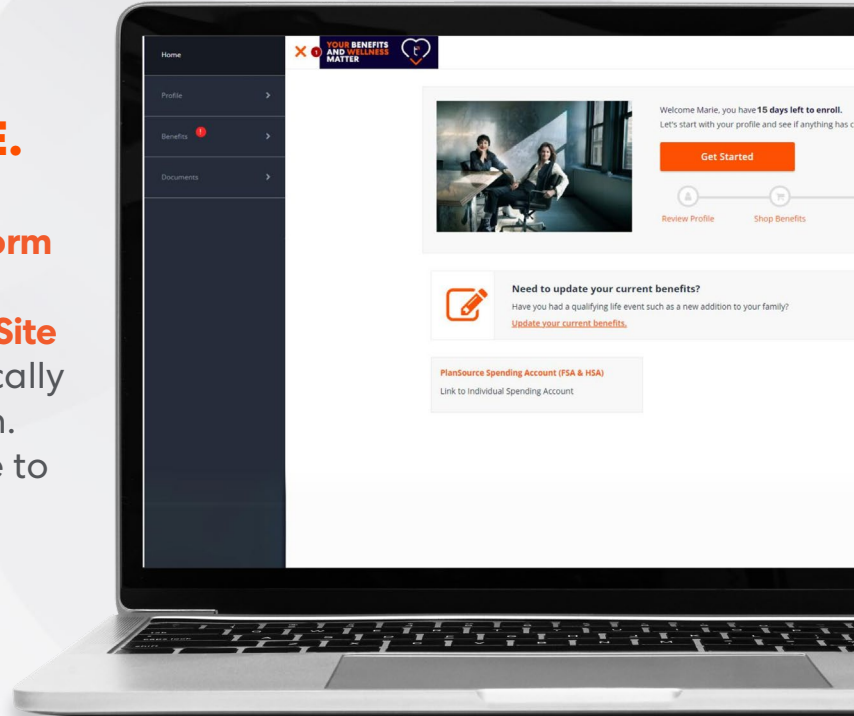
Visit the People Platform (Oracle) to ensure your Personal Details are accurate. If you have concerns about any items you're not able to edit, please submit through the [MYHR Support process](#).

Step 2 GET SET. Log in to PlanSource.

It's time to enroll in benefits using PlanSource. Let's log in.

LOG IN TO PLANSOURCE.

1. Navigate to the **People Platform (Oracle)**.
2. Click the **Benefits Enrollment Site** button. You will be automatically logged in using single sign-on.
3. Click **Get Started** and it's time to shop for your benefits!



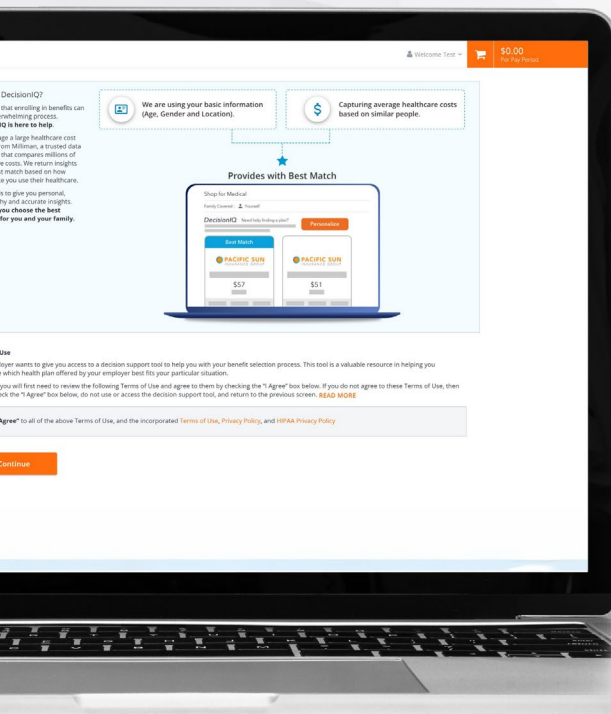
DECISIONIQ

DecisionIQ is a voluntary decision support tool to help with the benefits election process.

To gain access to DecisionIQ:

1. Review the **Terms of Use** and agree.
2. Check the box to agree to the terms of use.
3. Click **Continue**.

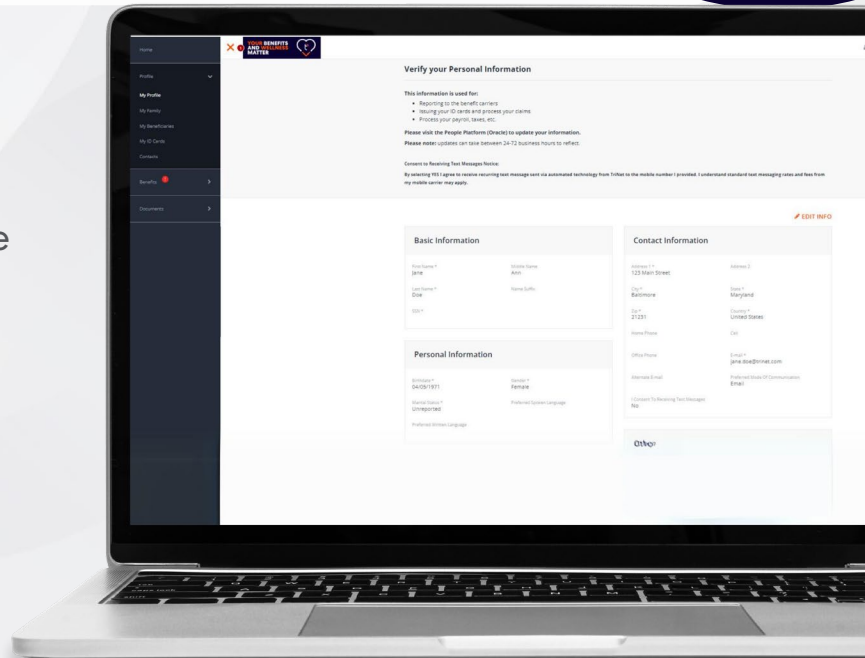
Participation in DecisionIQ is optional and no additional information is required beyond your demographic information that is already prepopulated. You are not required to use Decision IQ nor choose the suggested benefits.



Step **2** **GET SET.** **Review information.**

REVIEW PERSONAL INFORMATION.

First, review **My Profile** to ensure all your personal information is correct in PlanSource.



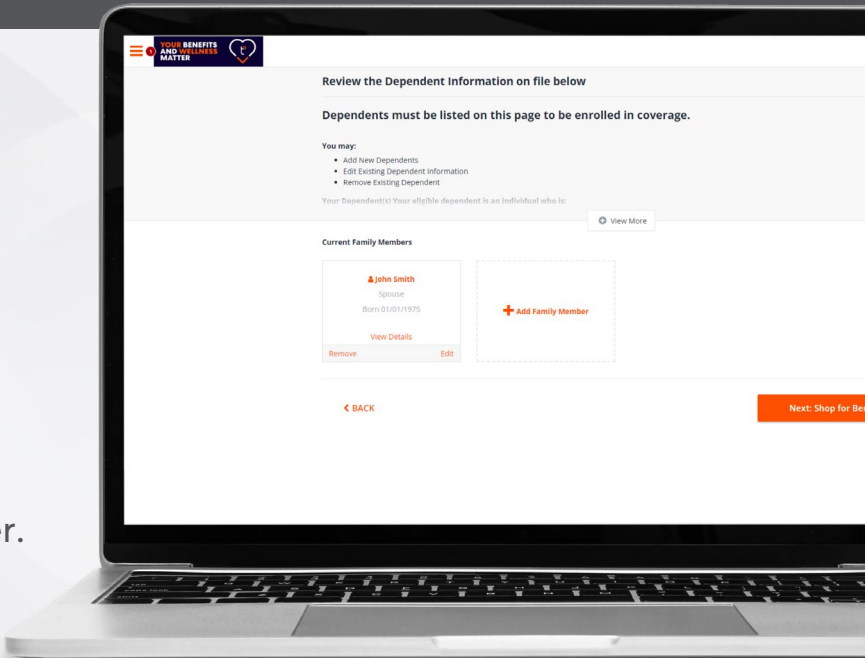
Important tip to remember:

If your profile information isn't correct, please review in the People Platform (Oracle). Please allow one business day to reflect new changes in PlanSource. If you have urgent concerns, please reach out to colleaguebenefitswellness@trinet.com.

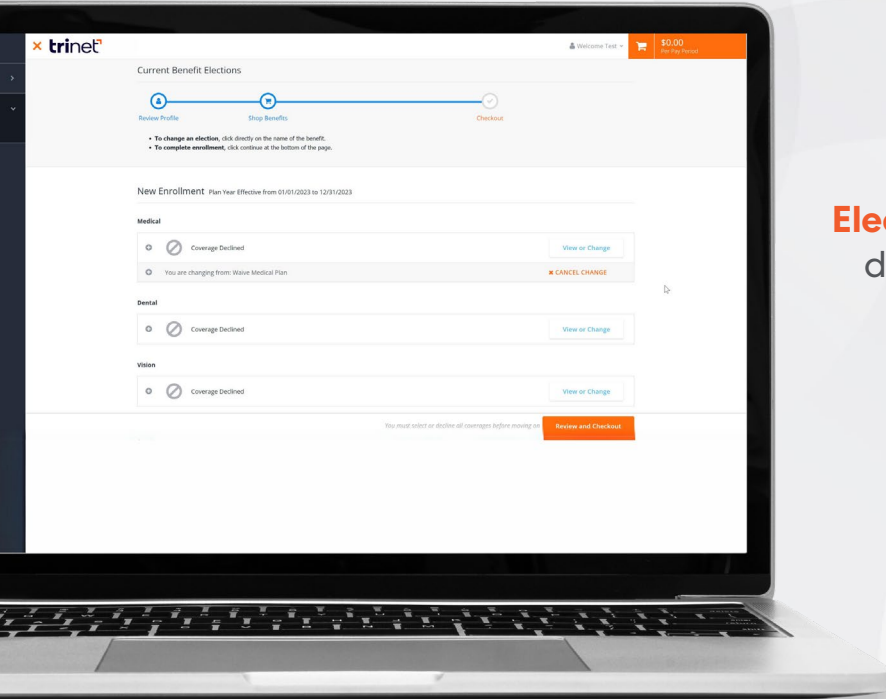
REVIEW DEPENDENT INFORMATION.

Next, using **My Family**, review your dependent information to ensure it's accurate.

You can also add dependents. You'll need their name, date of birth and Social Security number.



Step 2 GET SET. Shop for benefits.



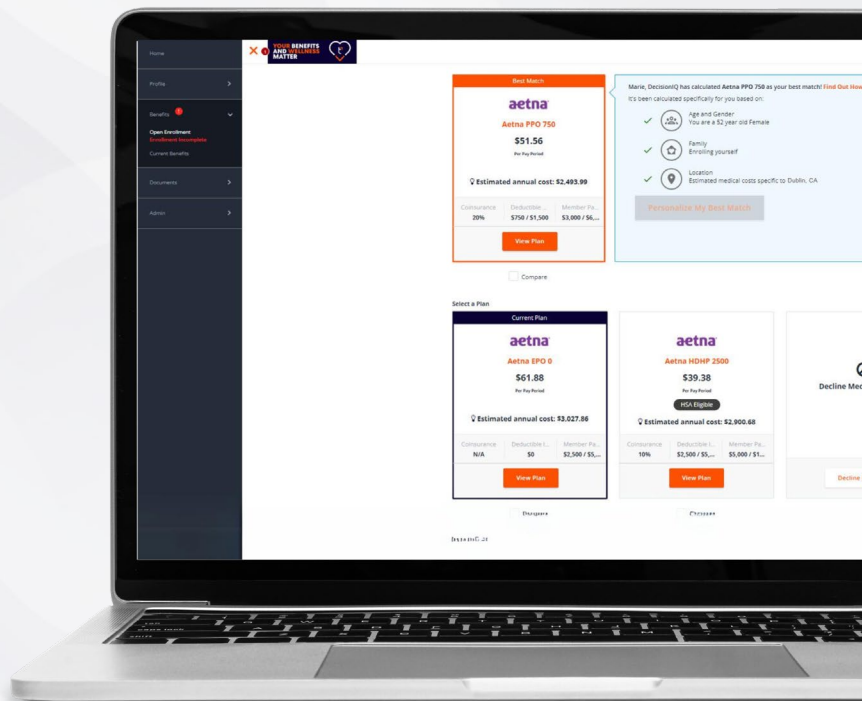
ELECT OR WAIVE.

Elect or waive your 2024 medical, dental, vision, supplemental life and AD&D, FSA, HSA and voluntary benefits by adding them to your shopping cart.

VIEW AND ADD TO CART.

Click **View Plan** for more details or select two or more plans to compare benefits.

When you've chosen a plan, click **Add to Cart** to add your benefits election.

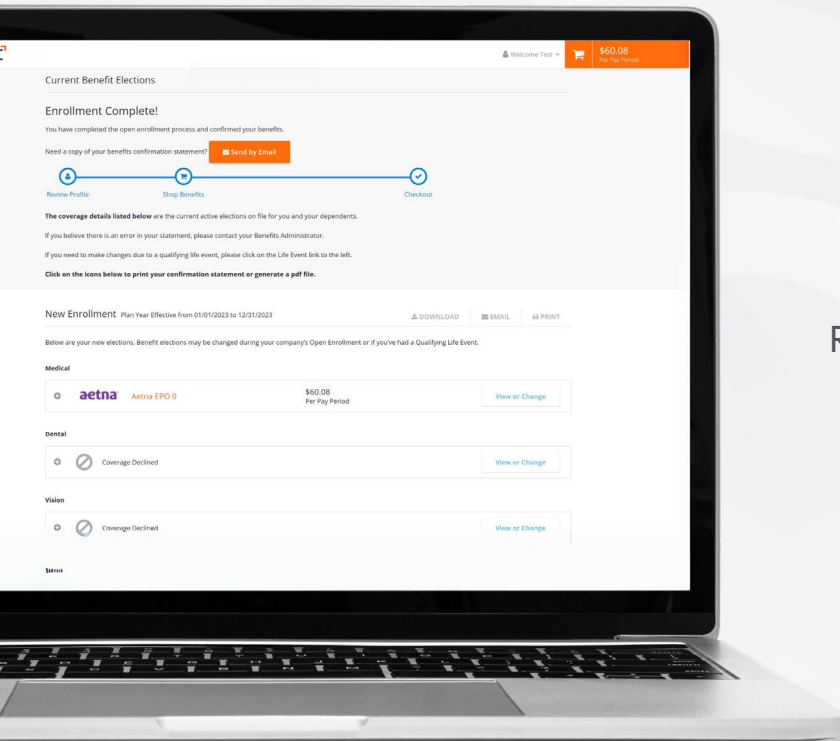
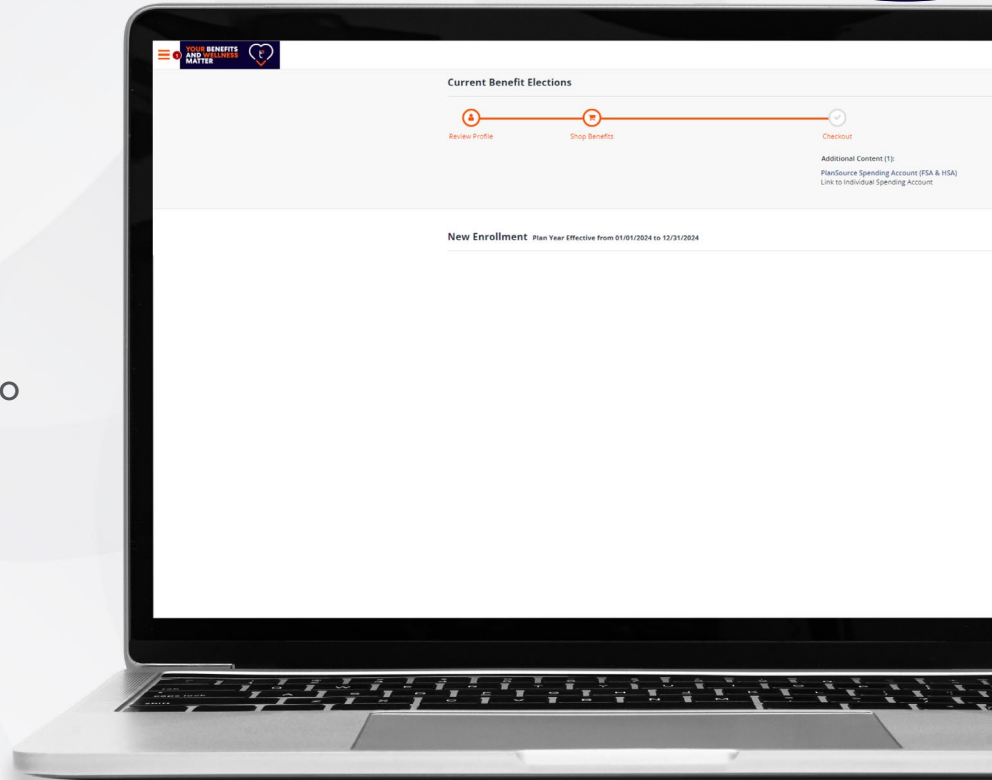


Step **3** **GO!** Checkout.

REVIEW AND CHECK OUT.

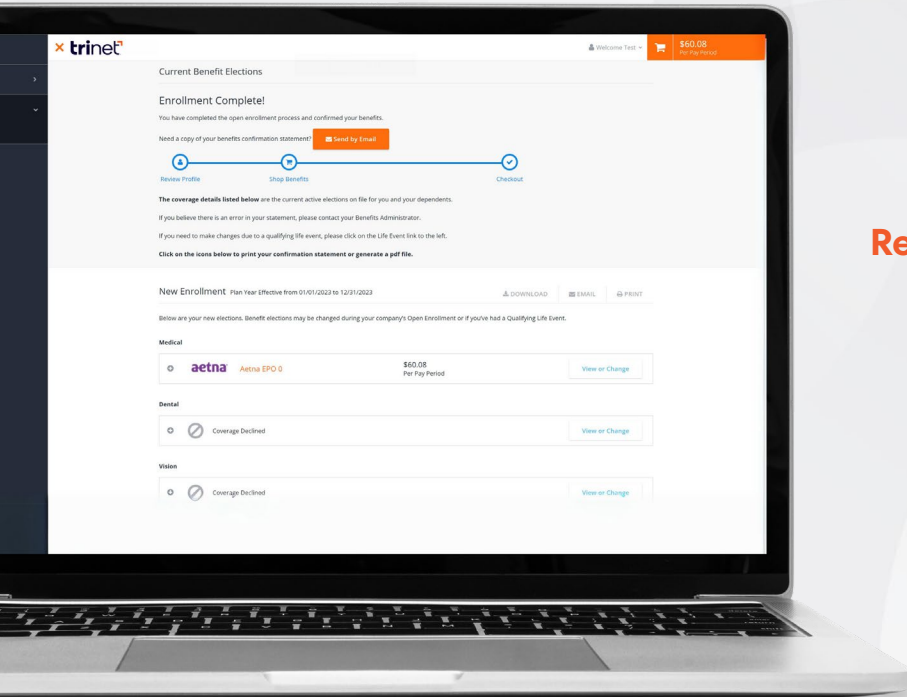
Now that your 2024 benefits are in your shopping cart, it's time to check out.

Click **Review and Checkout.**



Review selections by clicking **View or Change** then click **Checkout.**

Step **3** GO! Confirm.



Review the Confirmation page.

Download the Confirmation page as a PDF for later reference.

And that's a wrap for enrolling in benefits using PlanSource.
We hope you enjoyed your shopping experience.

MAKE CHANGES.

Want to make changes to benefits after they've been submitted? You have until **November 15, 2023**, to go back in to PlanSource and update your benefit elections. The last elections you check out will be considered final.

To make changes to your benefit elections, click **View or Change** next to any benefit option on the **Current Benefit Elections page in PlanSource**.