

Adding and Changing Life Insurance Beneficiaries

Once you are logged in to PlanSource click on Profile (left hand side in black bar, if no black bar is showing click on the lines next to your company's name) > Click on **Profile > My Beneficiaries**

* Click on **Show Beneficiaries for Plan Year** > chose plan year 02/01/20** (use current year)

Review Current Beneficiaries

You can view, add, or edit beneficiaries for each of your coverages

Show beneficiaries for plan year:

Your Current Beneficiaries

01/01/2021 - 12/31/2021

02/01/2021 to 01/31/2022

01/01/2022 - 12/31/2022

02/01/2022 - 01/31/2023

Basic Employee Life and Dismemberment

< BACK

- Click on + sign in box beside Medical Mutual symbol

Show beneficiaries for plan year:

02/01/2021 to 01/31/2022

+ MEDICAL MUTUAL Basic Employee Life and Dismemberment

Enter beneficiary information including allocation ie. 100= 100%.

You may enter as many beneficiaries as you want as long as the total percentage allocation equals 100%

*Click Add

If you would like to add secondary beneficiaries click on Yes > Click on Add Beneficiary and repeat above directions.

You should see a box that states that you have successfully updated your beneficiaries

Click on the dropdown box beside the Welcome icon at the top of the screen

Choose Communication Preferences

Enter your Marlinton email address

Enter your cell phone number if desired

If you want to receive communications via text message, click the I Consent to Receiving Text Messages box

Log out of PlanSource using the dropdown box beside the Welcome icon at the top of the screen