Instructions for Making Benefit Elections in PeopleSoft eBenefits

Below are the steps you will follow to log into PeopleSoft and make your benefit elections, which include selecting coverages, adding/enrolling dependents, and designating life insurance beneficiaries.

1. Go to the InSite Home Page (most County employees) and in the **"Top Links"** section click on the **"Employee Self Service"** link.
   If you are with the DA or Sheriff's Departments, please refer to your departmental link.

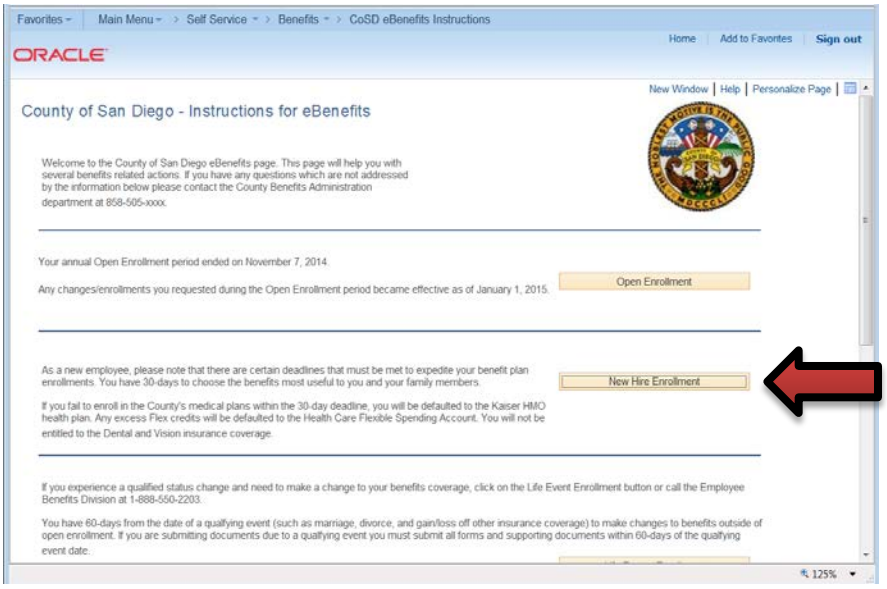
2. After clicking the Employee Self Service link, you will be directed to the Employee Self Service welcome page. The links at the bottom of this page will direct you to Employee Self Service User Guides which will assist you in viewing and updating your information in Self Service.

3. To enroll in benefits click the link in the center of the welcome page that says "**Log into eBenefits**", this will direct you to the PeopleSoft login page.

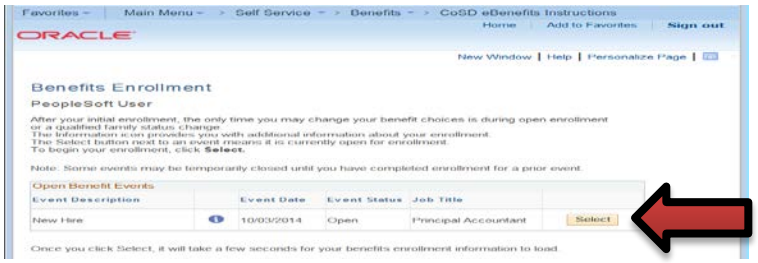
4. Enter your User ID and Password:
   a. Enter your <u>six</u> digit employee ID number in the "User ID" field. Do not use any letters and be sure to include any necessary zeros (0) at the beginning.
   b. Enter the password that was emailed to your business email address in the "Password" field. If you did not receive a password or you do not know your password, please contact your help desk to have it reset.

5. Once you have logged in, you will be directed to the Instructions for eBenefits page. If you are not taken to the eBenefits page directly, you can navigate there by clicking on "Main Menu", then "Self Service", then "Benefits", and then "CoSD Benefits Instructions".

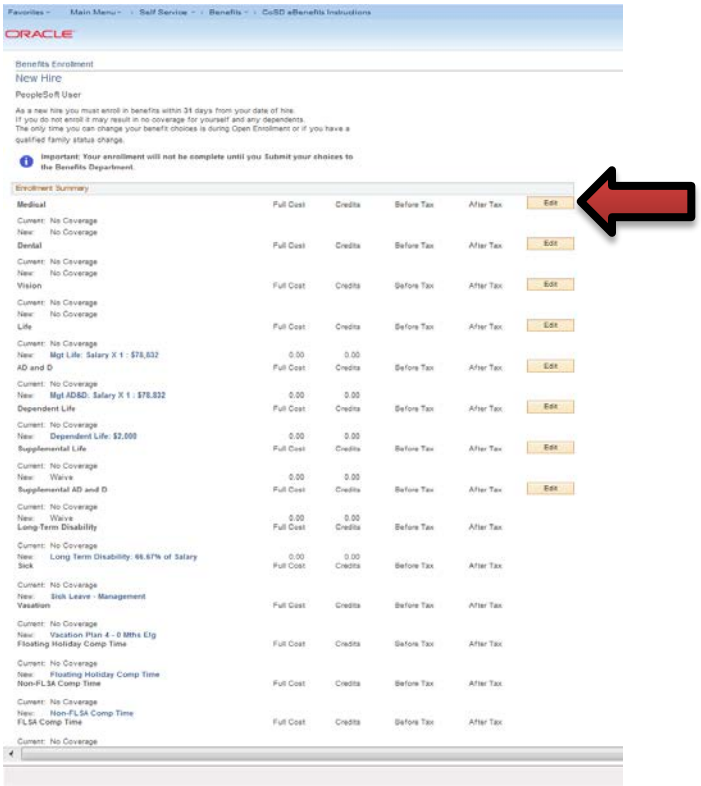
6. Click on the second button labeled "**New Hire Enrollment**". A new page will open with a link to your Benefits Enrollment.



7. You should have a New Hire Open Benefit Event on this page. Click the "Select" button to the right of the New Hire event to begin your enrollment. If you do not have a New Hire event, please contact Benefits at (888) 550-2203.



8. You are now on the Benefit Enrollment page which displays the benefit plans you are offered. If you not yet made elections, No Coverage or a Default plan will be displayed.



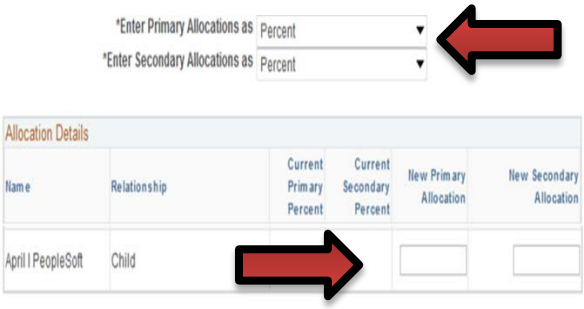
9. To enroll in a benefit, medical, dental, insurance, etc. you will click the "Edit" button to the right of the Benefit you want to enroll in, select desired coverage, add dependents and/or beneficiaries where applicable, then click on "Continue" to store your election and return to the Benefit Enrollment page. Note: medical coverage is required; if you currently have medical coverage, which you will maintain during your employment with the County, you will click on "Edit" to the right of Medical, scroll to the bottom of the page, elect "Waive", click on "Continue" and then submit a completed Proof of Other Health Insurance form. See #18 below on how to submit required documents. All other benefits are optional.

10. Some benefit elections, medical, dental, insurance may include enrolling dependents and/or designating beneficiaries. To add a dependent and/or beneficiary you will:
    a. Click on "Edit" to the right of the benefit you want to enroll in.
    b. Select the level of coverage you want.
    c. Scroll to the bottom of the election coverage screen and click on "Add/Review Dependents".
    d. Click "Add a dependent or beneficiary".
    e. Fill in the information requested, which includes the dependent/beneficiary social security number and date of birth.
    f. Click on "Save".
    g. To add additional dependents/beneficiaries repeat steps d - e above.
    h. Click on "Return to Event Selection" once you have all your dependent/beneficiaries added.

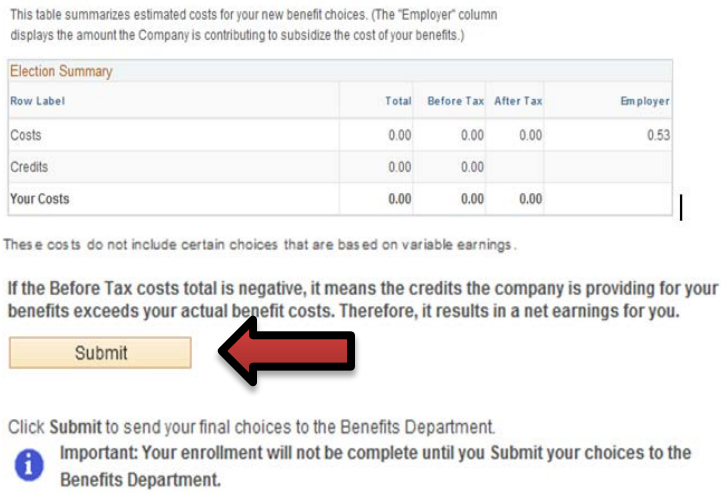
IMPORTANT!
In order to enroll your Domestic Partner or your Domestic Partner's children, please notify the Benefits Division at 888-550-2203 prior to making your enrollment selections.

11. You can now enroll dependents and/or designate beneficiaries from the Dependent Beneficiary list. See #18 below on how to submit required documents.
    a. To enroll a dependent click on the box next to the dependent(s) you want to enroll.

    b. To designate a beneficiary:
        i. Leave Allocation as percent; do not change to Flat Amount.
        ii. If you designate only one beneficiary enter 100 in the New Primary Allocation box.
        iii. If you designate multiple beneficiaries enter the % for each beneficiary in the New Primary and/or New Secondary Allocation boxes; both the Primary and Secondary Allocation totals should equal 100%.
        iv. **NOTE**: If you are married and elect anyone other than your spouse as a Primary Beneficiary or your spouses primary election is less than 100%, you must complete and submit/upload a manual METLIFE Beneficiary form.



12. As you make your elections the table on the bottom of the Benefit Enrollment page will be updated. This table indicates bi-weekly employer/employee costs associated with your elections.

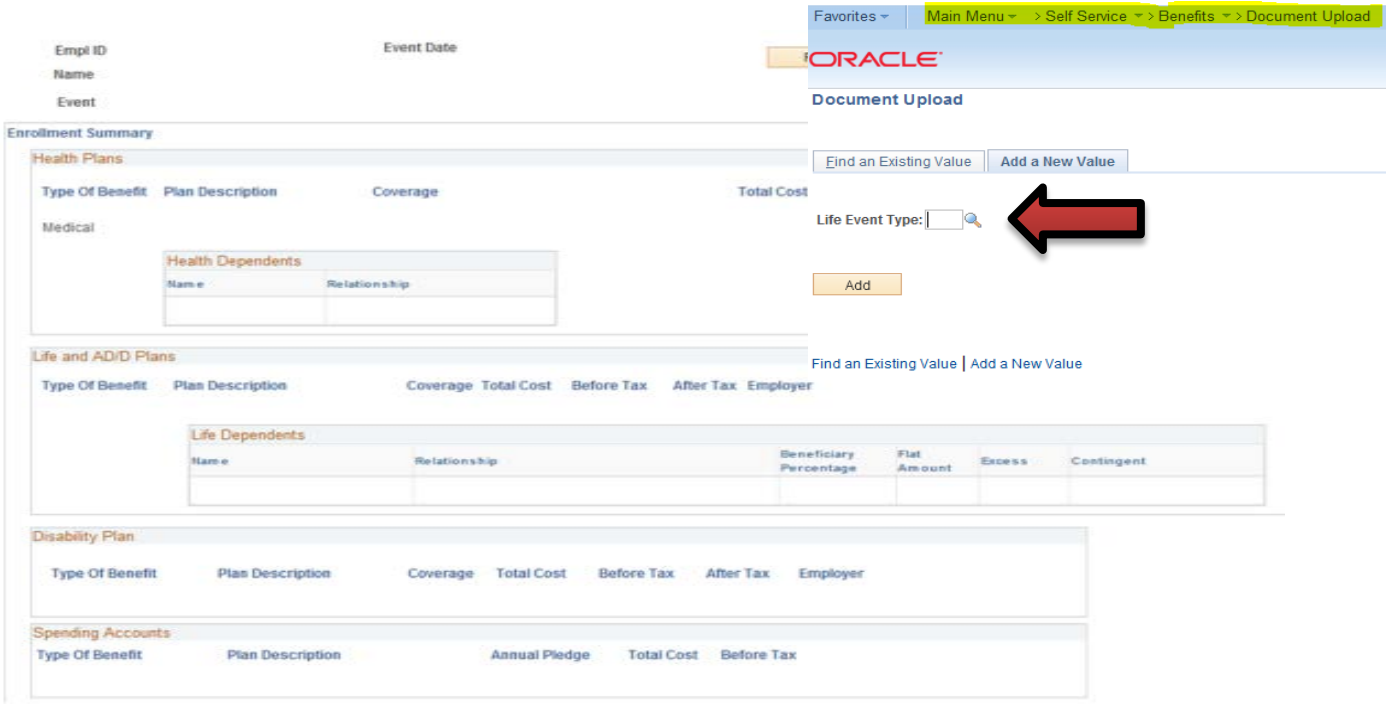
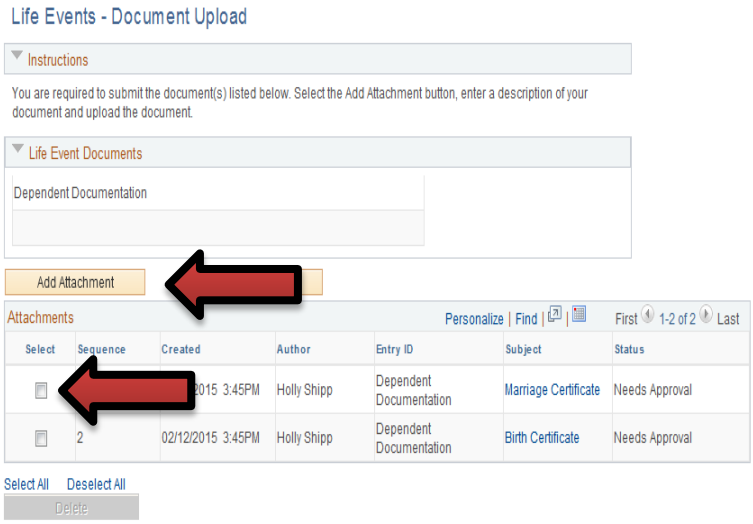


13. Once you have made your elections you must click the "**Submit**" button on the bottom of the Benefit Enrollment page to finalize your enrollment.

14. If you receive a warning message after clicking Submit, read the message carefully, then click "Return" to go back to the Benefit Enrollment page to edit your elections or "Continue" to submit your elections.

15. After finalizing and submitting your elections you will be directed to the Submit Benefit Choices page. Read the information on this page carefully as this is the final step to sending your elections to the Benefits Department. Click "Submit" to complete your enrollment or "Cancel" to go back and make changes to your elections.

16. Once you complete your enrollment you will be directed to the Enrollment Summary page, which is a summary of your elections. To print a copy of your Enrollment Summary click “Print”.



17. Submitting Required Documents. When you waive medical coverage and/or add dependents you are required to submit supporting documents to the Benefits Department. To submit these documents you will:
    a. Save a soft copy of your documents.
    b. Navigate to the Document Upload page by clicking on “Main Menu”, then “Self Service”, then “Benefits”, and then “Document Upload”.
    c. Click on the magnifying glass to the right of the “Life Event Type” box.
    d. Click on “Hire”.
    e. Click “Add Attachment”.
    f. Enter a description of the document being submitted in the “Subject” box.
    g. Click “Add Attachment”.
    h. Click “Browse”.
    i. Locate document.
    j. Click “Upload”.
    k. Click “Save”.
    l. If you have more than one document to submit, repeat steps e - k above.
    m. If you want to delete a document that you have uploaded, click on the box to the left of the document, then click “Delete”, then click ‘Yes”.
    n. You have completed submitting your enrollment documents and can now navigate to another page or exit Self Service by clicking “Sign out” in the top right corner of the page.