

Instructions for Adding a Life Event in PeopleSoft eBenefits

Below are the steps you will follow to log into PeopleSoft and add your Life Event which include uploading documents, selecting coverages, adding/enrolling dependents, and designating life insurance beneficiaries.

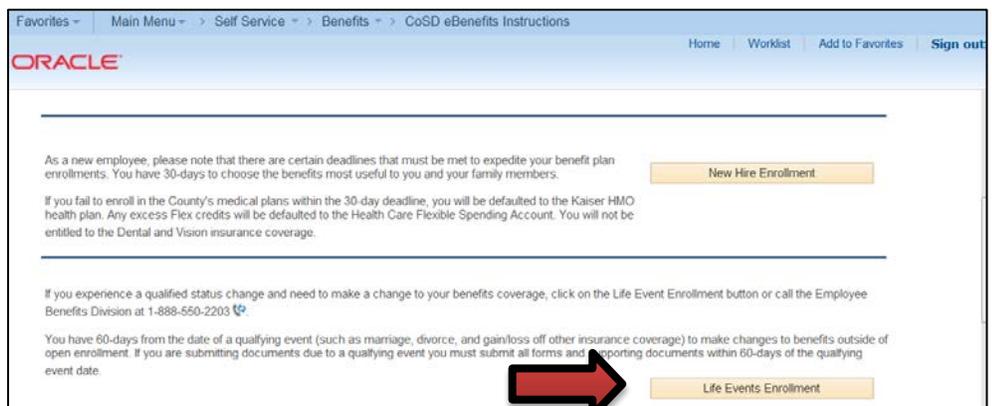
1. Go to the InSite Home Page (most County employees) and in the **“Top Links”** section click on the **“Employee Self Service”** link. If you are with the DA or Sheriff’s Departments, please refer to your departmental link.
2. After clicking the Employee Self Service link, you will be directed to the 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 six 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.

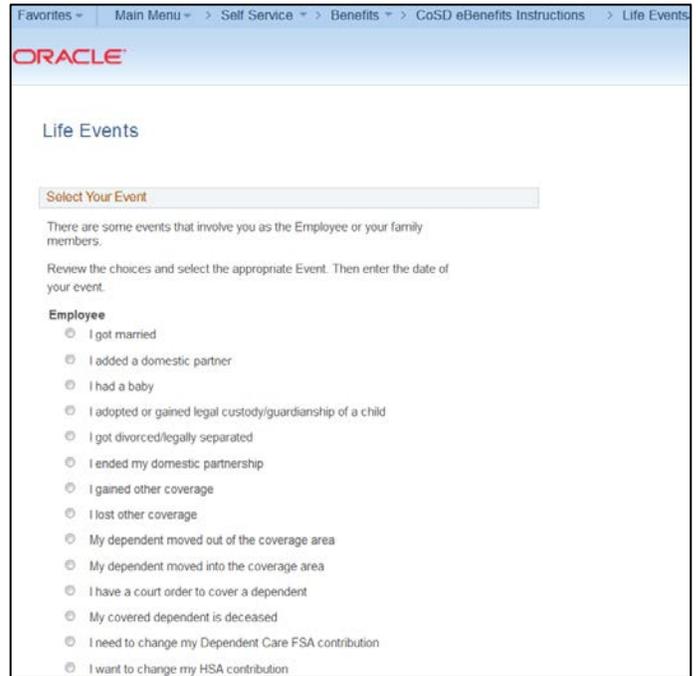


5. Once you have logged in, you will be directed to the Instructions for the eBenefits page. If you are not taken to the eBenefits page directly, you can navigate there by clicking on “Main Menu”, then “Self Service”, then “Benefits”, and then “CoSD Benefits Instructions”.



6. Click on the third button labeled “Life Events Enrollment”. The “Life Events” page will open.

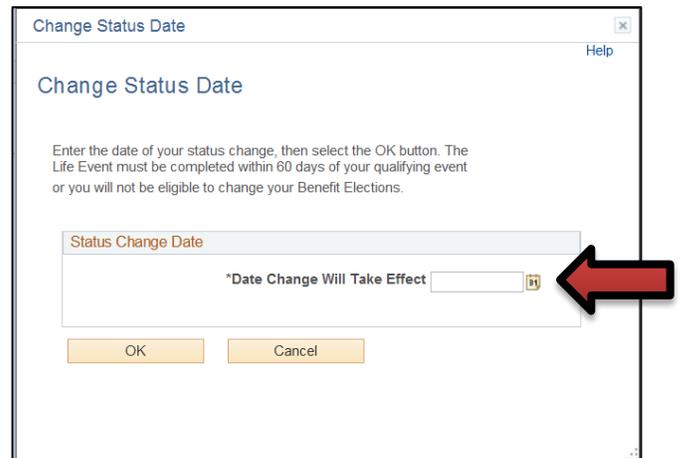
7. Select your event by clicking the button next to the appropriate event.



The screenshot shows the Oracle Life Events page. At the top, there is a navigation bar with links: Favorites, Main Menu, Self Service, Benefits, CoSD eBenefits Instructions, and Life Events. Below the navigation bar is the Oracle logo. The main heading is "Life Events". Underneath, there is a section titled "Select Your Event". The text reads: "There are some events that involve you as the Employee or your family members. Review the choices and select the appropriate Event. Then enter the date of your event." Below this text is a list of events under the heading "Employee". The events are: I got married, I added a domestic partner, I had a baby, I adopted or gained legal custody/guardianship of a child, I got divorced/legally separated, I ended my domestic partnership, I gained other coverage, I lost other coverage, My dependent moved out of the coverage area, My dependent moved into the coverage area, I have a court order to cover a dependent, My covered dependent is deceased, I need to change my Dependent Care FSA contribution, and I want to change my HSA contribution. Each event has a radio button next to it.

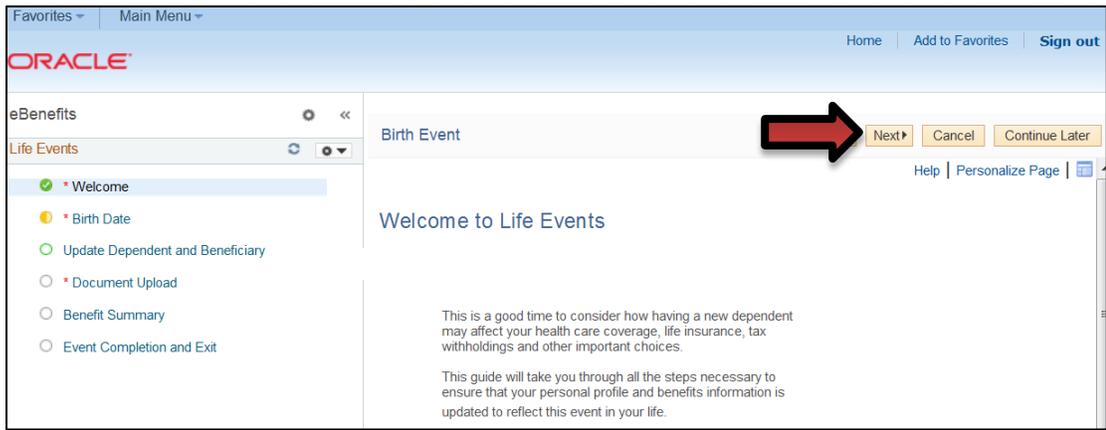
8. Enter the date that your qualifying event took place such as the date of birth, marriage date, or the date you gained other coverage. Select "OK." This is not necessarily the date that the coverage changes will be effective. Benefits effective date is the first of the following month from when this process is completed.

Note: The Life Event must be completed within 60 days of your qualifying event or you will not be eligible to change your Benefit Elections.



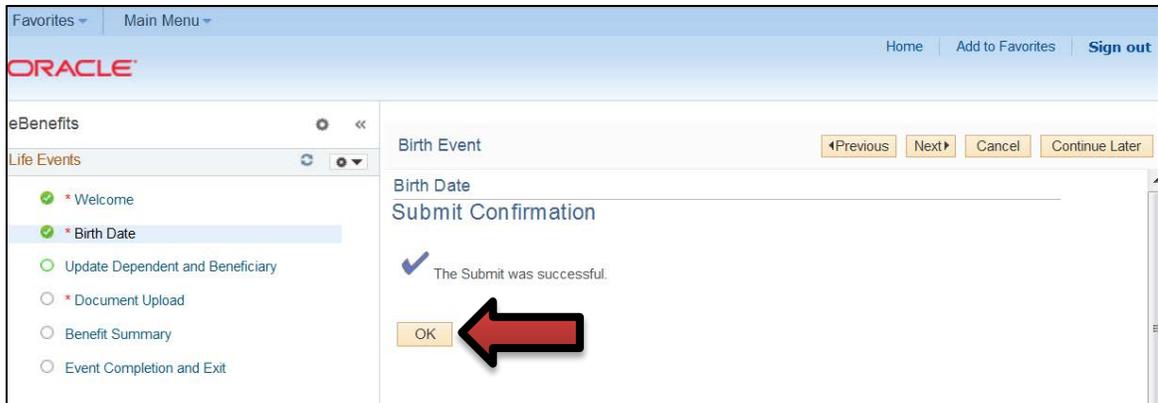
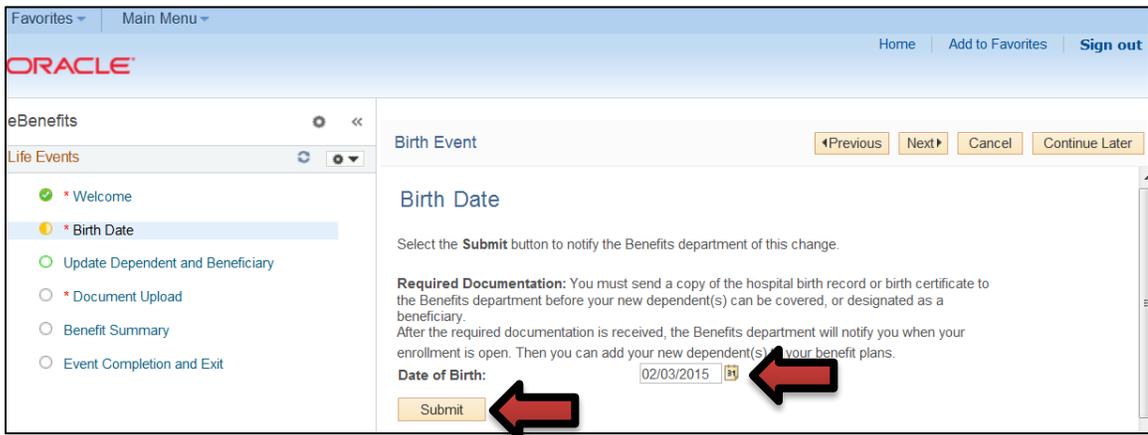
The screenshot shows a dialog box titled "Change Status Date". At the top right, there is a "Help" link. The main heading is "Change Status Date". Below the heading, the text reads: "Enter the date of your status change, then select the OK button. The Life Event must be completed within 60 days of your qualifying event or you will not be eligible to change your Benefit Elections." Below this text is a text input field labeled "Status Change Date". Below the input field is a label "*Date Change Will Take Effect" followed by a date picker icon. A red arrow points to the date picker icon. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

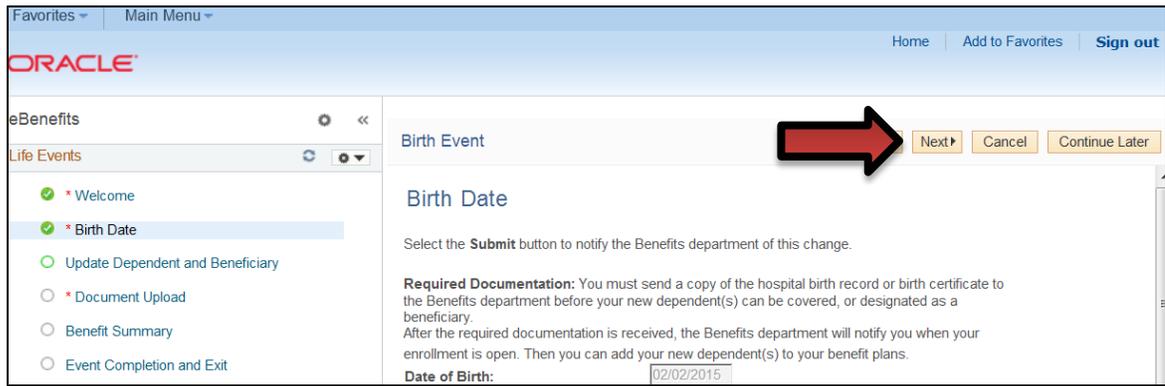
9. You will be directed to Life Events Welcome page. This page will take you through all the steps necessary to add/review your dependent and beneficiary information. Click on the "Next" button to begin.



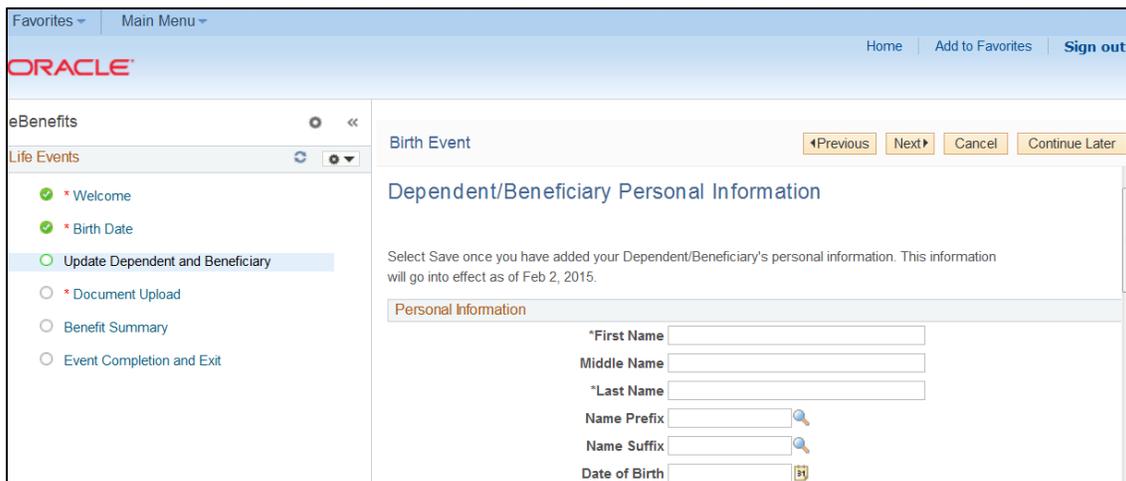
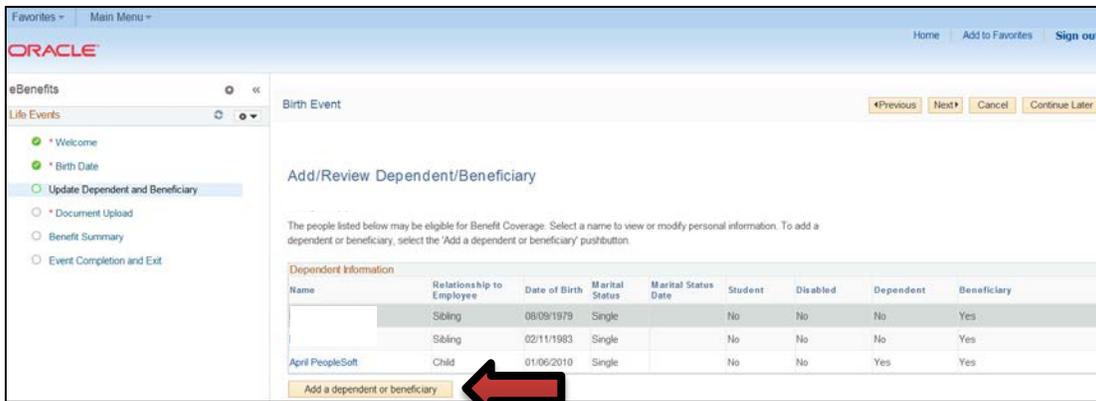
10. Enter the date of the life event and click “Submit.” You will receive a confirmation message then click “OK.” Select the “Next” button to continue.

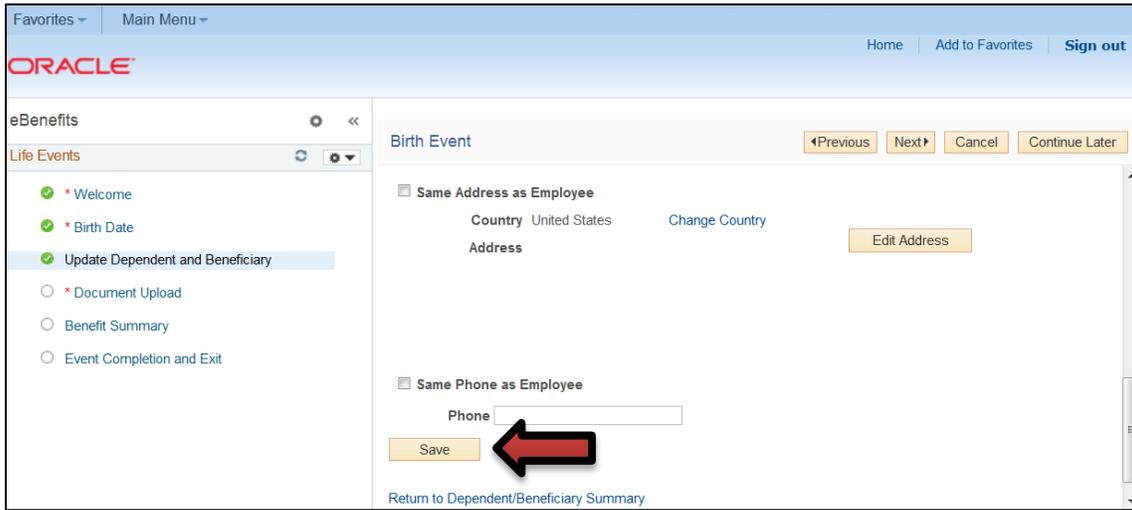
Note: You will be required to submit the required documentation for this life event in a further step.





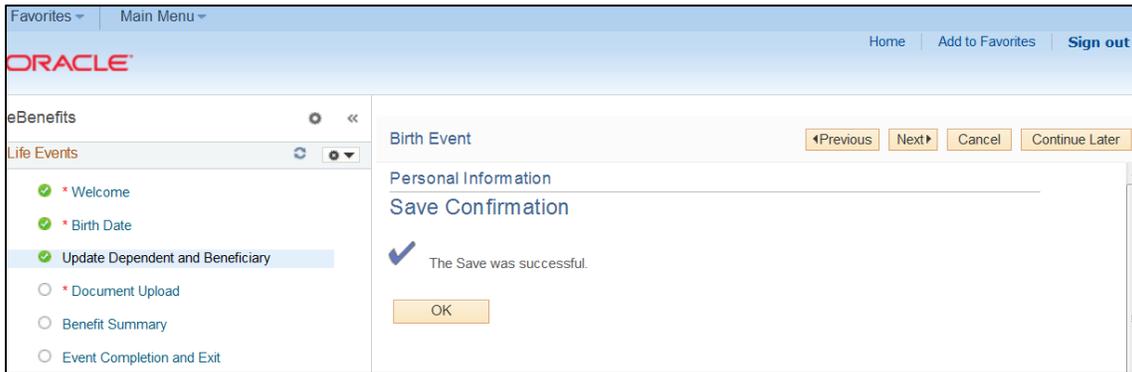
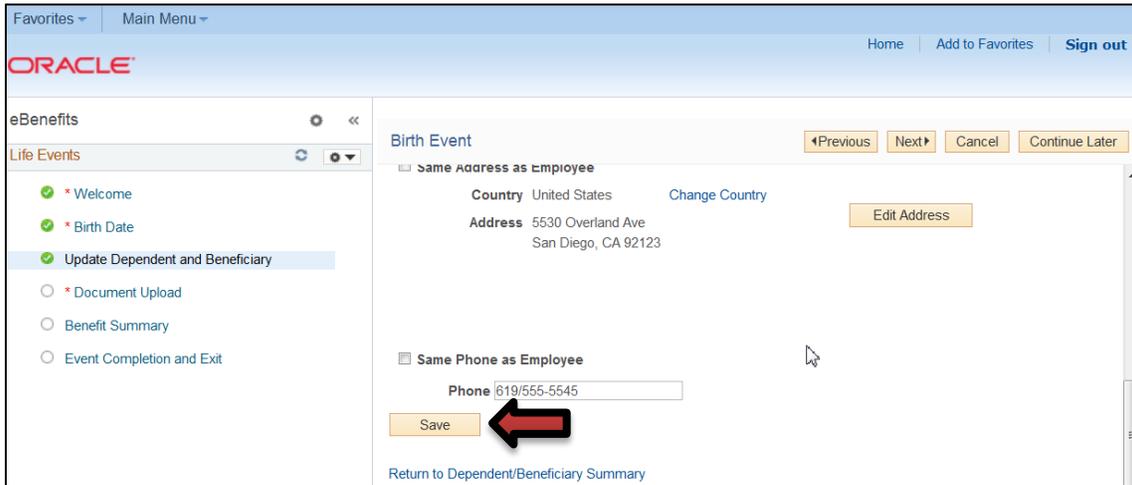
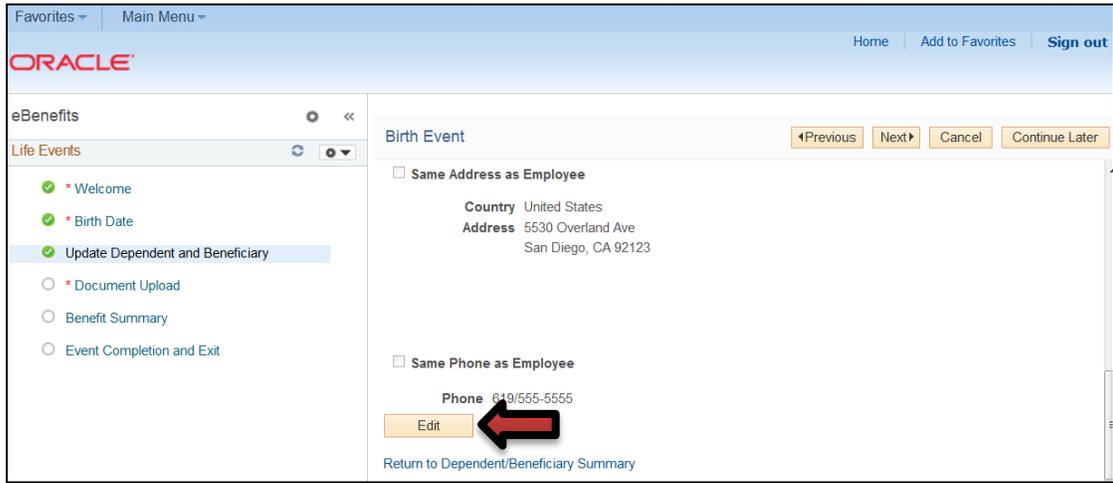
11. You can now add/review your dependent and beneficiary information. Select the “Add a dependent or beneficiary” button. Complete the dependent’s personal information and click “Save.” Be sure to complete the required Date of Birth and Social Security Number fields. You will receive a confirmation message then click “OK.”



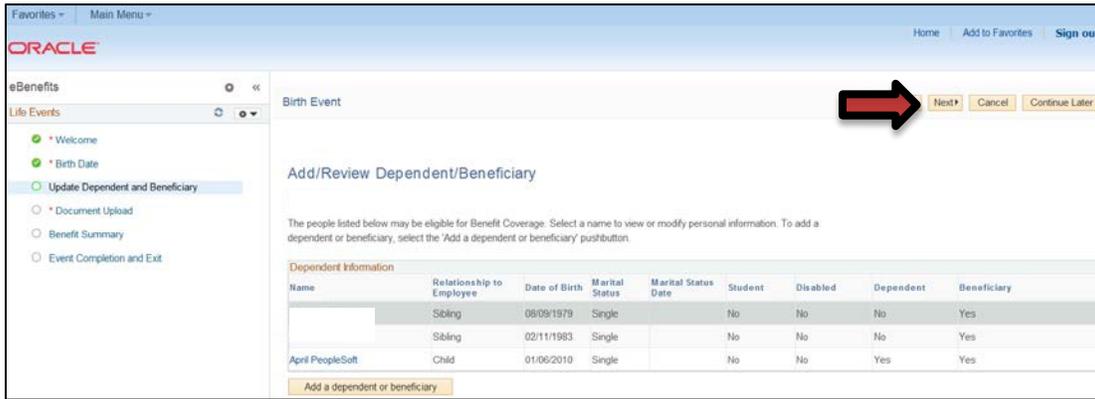


12. To update existing dependent or beneficiary personal information, click on their name. Scroll down and select "Edit." Update the necessary personal information and click "Save." You will receive a confirmation message then click "OK." To update other dependent or beneficiary personal information follow the same steps.

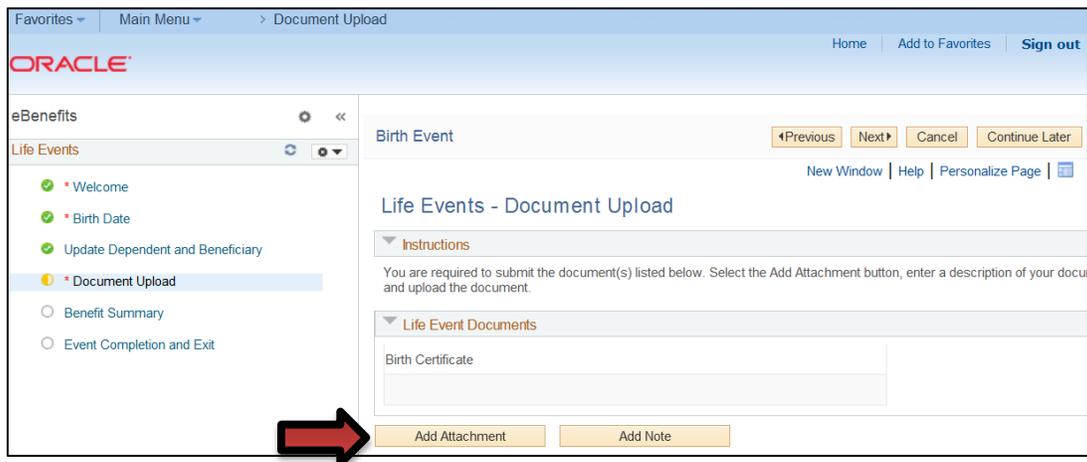




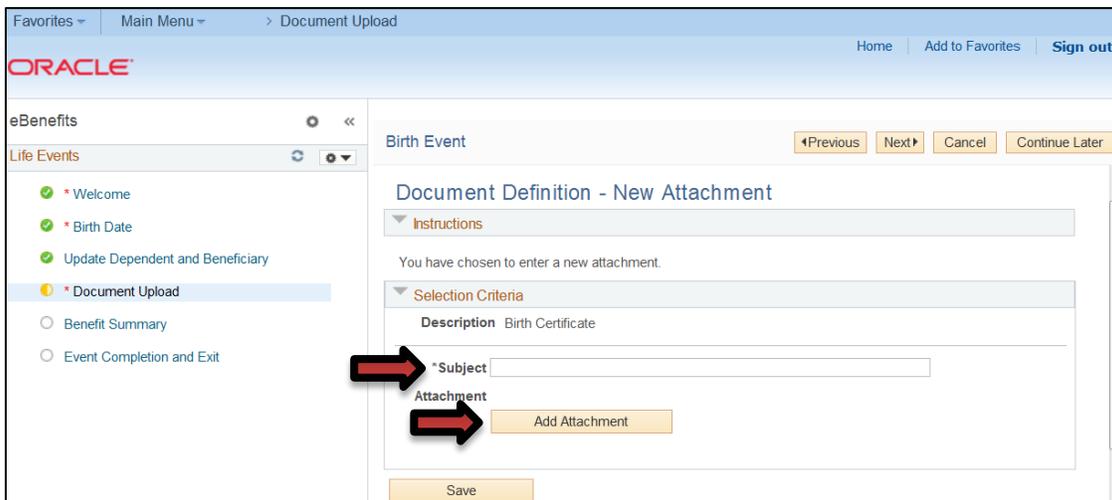
13. Click on the "Next" button to continue.



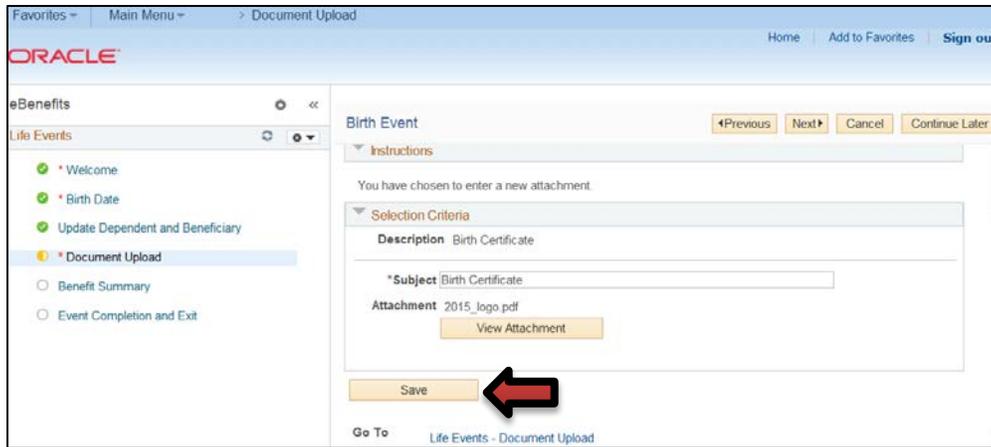
14. You will now upload the required documentation on the “Life Events – Document Upload” page. Select the “Add Attachment” button.



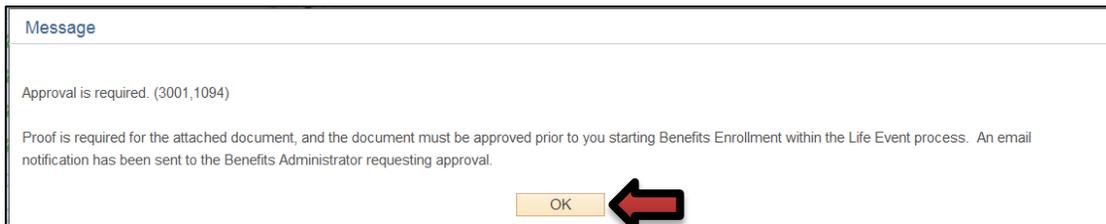
15. In the “Subject” box, enter the description of the document such as the dependents name or type of document you are submitting then select “Add Attachment.”



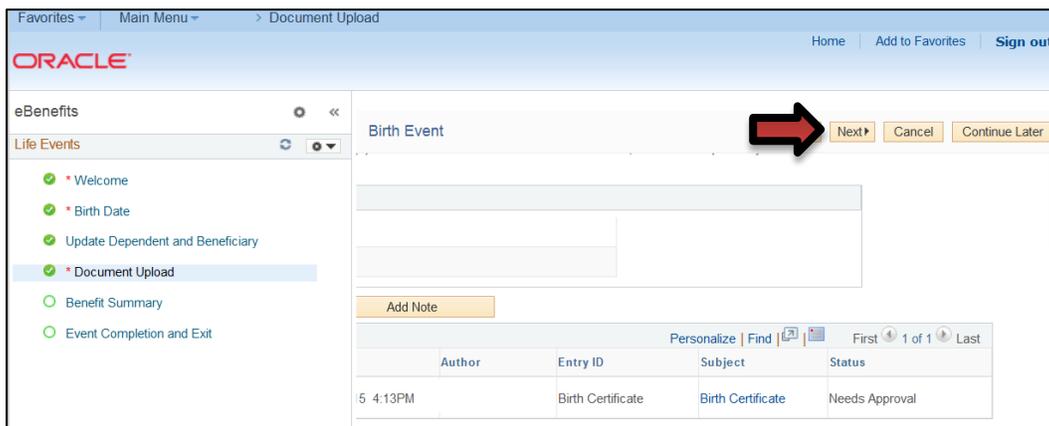
16. Select the “Browse” button to locate the document on your computer. Once you locate the document, select “Upload.” When the document is uploaded, select “Save.”



17. You will receive a message stating that the Benefits Department will need to review and approve your document before you can continue with the Benefits Enrollment process. You will receive an email from the Benefits Department when your document has been approved. Click “OK” to continue.



18. Click on the “Next” button to continue to the “Benefit Summary” page.



19. The “Benefits Summary” page allows you to view your current benefit elections. You can also click on “View my Total Compensation Summary” to view additional benefits the County may provide to you. Click the “Next” button for the next step.

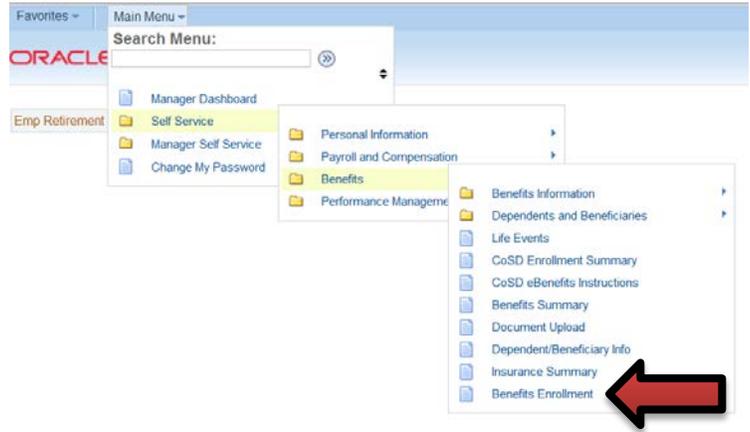
Oracle eBenefits interface showing the 'Birth Event' page. The page title is 'Birth Event' and the sub-section is 'Benefits Summary'. The left sidebar lists 'Life Events' with 'Benefit Summary' selected. The main content area shows a date input field set to '02/02/2015' and a 'Go' button. Below this is a table titled 'Benefits Summary' with columns for 'Type of Benefit', 'Plan Description', and 'Coverage or Participation'. The table lists 'Medical' (Kaiser High Deductible Plan) and 'Dental' (Delta Dental DHMO). Navigation buttons include 'Next', 'Cancel', and 'Continue Later'. A 'View my Total Compensation Summary' button is also visible. A red arrow points to the 'Next' button, and another red arrow points to the 'View my Total Compensation Summary' button.

Type of Benefit	Plan Description	Coverage or Participation
Medical	Kaiser High Deductible Plan	Employee + (1) Depen
Dental	Delta Dental DHMO	Employee + (1) Depen

20. You have now completed your Request for a Life Event! Click the “Complete” button to sign out. If your request is approved, you will be notified to continue making the changes to your benefit elections. Continue to the next step when you receive notification from the Benefits Division.

Oracle eBenefits interface showing the 'Birth Event' page. The page title is 'Birth Event' and the sub-section is 'Birth Event'. The left sidebar lists 'Life Events' with 'Event Completion and Exit' selected. The main content area displays a congratulatory message: 'Congratulations! You have completed your Birth Event. Here is a list of things to keep in mind now that you have a new child: Find out if your medical plan offers discounts on infant care equipment, home nurse visits, and postnatal classes. Evaluate day care centers. Evaluate our Dependent Care Spending Account plan to assist with day care expenses. Schedule your baby's first visit with the pediatrician. Order a Social Security or Social Insurance card for your baby. Select the Complete pushbutton to end this event.' A 'Complete' button is located at the bottom. Navigation buttons include 'Previous', 'Next', 'Cancel', and 'Continue Later'. A 'Sign out' button is visible in the top right corner. A red arrow points to the 'Sign out' button, and another red arrow points to the 'Complete' button.

21. Once notification has been received log back into eBenefits. Once you have logged in, navigate to the Benefits Enrollment page. You can get there by clicking on “Main Menu”, then “Self Service”, then “Benefits”, and then “Benefits Enrollment”.



22. You should have an Open Benefit Event on this page. Click the “Select” button to the right of the event to begin your enrollment. If you do not have an open event, please contact Benefits at (888) 550-2203.

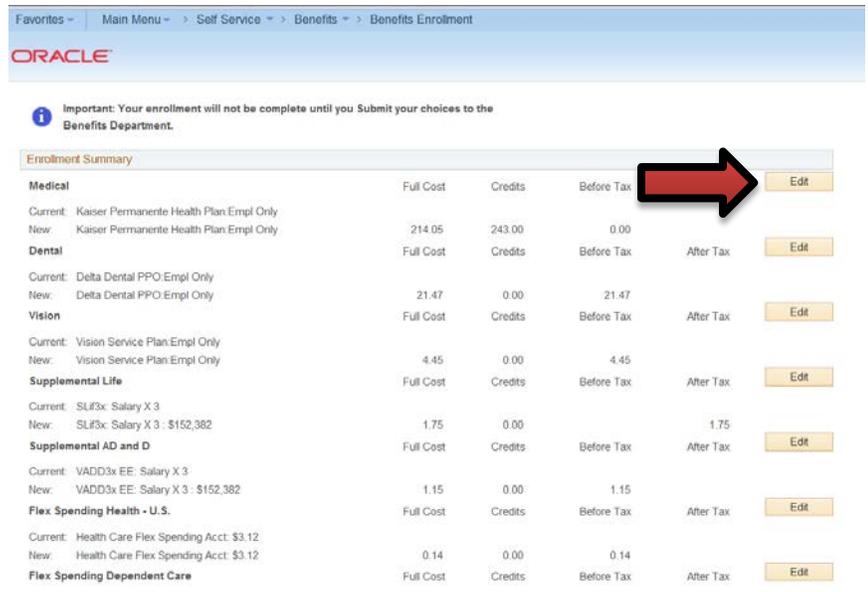
After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change. The information icon provides you with additional information about your enrollment. The Select button next to an event means it is currently open for enrollment. To begin your enrollment, click **Select**.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Open Benefit Events				
Event Description	Event Date	Event Status	Job Title	
Birth	02/26/2015	Open	Human Ser	Select

Once you click Select, it will take a few seconds for your benefits enrollment information to load.

23. You are now on the Benefit Enrollment page which displays the benefit plans you are offered and your current elections.



24. To make changes to your benefits, you will click the “Edit” button to the right of the Benefit you want to change, 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.

25. Some benefit elections, medical, dental, insurance may include enrolling dependents and/or designating beneficiaries. To add a dependent and/or beneficiary you will:

- Click on “Edit” to the right of the benefit you want to enroll in.
- Select the level of coverage you want.
- Scroll to the bottom of the election coverage screen and click on “Add/Review Dependents”.
- Click “Add a dependent or beneficiary”.
- Fill in the information requested, which includes the dependent/beneficiary social security number and date of birth.
- Click on “Save”.
- To add additional dependents/beneficiaries repeat steps d - e above.
- Click on “Return to Event Selection” once you have all your dependent/beneficiaries added.



26. 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.

Dependent Beneficiary		
Enroll	Name	Relationship
<input checked="" type="checkbox"/>	April PeopleSoft	Child



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; your primary beneficiaries should total 100% and if you list secondary beneficiary(ies), that total should also equal 100%.

iv. **NOTE:** If you are married and elect anyone other than your spouse as a Primary Beneficiary or your spouse's primary election is less than 100%, you must obtain your spouse's signature and submit a manual METLIFE Beneficiary form.

*Enter Primary Allocations as 

*Enter Secondary Allocations as

Allocation Details					
Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
April PeopleSoft	Child			<input type="text"/>	<input type="text"/>



27. 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.

This table summarizes estimated costs for your new benefit choices. (The "Employer" column displays the amount the Company is contributing to subsidize the cost of your benefits.)

Election Summary				
Row Label	Total	Before Tax	After Tax	Employer
Costs	0.00	0.00	0.00	0.53
Credits	0.00	0.00		
Your Costs	0.00	0.00	0.00	

These costs do not include certain choices that are based on variable earnings.

If the Before Tax costs total is negative, it means the credits the company is providing for your benefits exceeds your actual benefit costs. Therefore, it results in a net earnings for you.



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

29. 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.

Click **Submit** to send your final choices to the Benefits Department.

 **Important:** Your enrollment will not be complete until you **Submit** your choices to the Benefits Department.

30. 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.

31. 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".

Empl ID	Event Date	Print
Name		
Event		

Enrollment Summary

Health Plans

Type Of Benefit	Plan Description	Coverage	Total Cost	Before Tax	After Tax	Employer	Credits
Medical							

Health Dependents

Name	Relationship

Life and AD/D Plans

Type Of Benefit	Plan Description	Coverage	Total Cost	Before Tax	After Tax	Employer

Life Dependents

Name	Relationship	Beneficiary Percentage	Flat Amount	Excess	Contingent

Disability Plan

Type Of Benefit	Plan Description	Coverage	Total Cost	Before Tax	After Tax	Employer

Spending Accounts

Type Of Benefit	Plan Description	Annual Pledge	Total Cost	Before Tax



This completes your life event process. You will receive notification from the Employee Benefits Division once your elections have been processed.