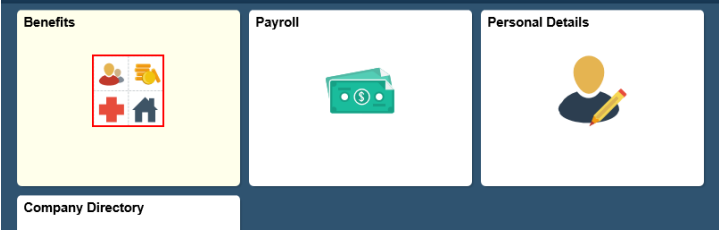




## Adding a Beneficiary and Modifying an Allocation

Step	Action
1.	<p>Click the <b>Benefits</b> button.</p> 
2.	<p>The <b>Benefits Self Service</b> page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid.</p> <p>This page contains the links that you use to review and manage your benefits information. These links allow you to</p> <ul style="list-style-type: none"><li>-- Review benefits summary information—to see your current or past benefits elections</li><li>-- Review and/or edit your Dependent and beneficiary information</li><li>-- Update your benefits information after you have experienced a qualifying Life Event—marriage, birth of a child, divorce, adoption, etc.</li><li>-- Enroll in benefits during an open enrollment period and/or at the time of hire</li><li>-- Upload documents in support of a qualifying life event or dependent verification</li><li>-- View benefits guides, links, and benefits forms</li><li>-- Request a CVC Voucher</li></ul>
3.	<p>You can add a dependent/beneficiary during enrollment and as part of a life event. These are covered in other topics.</p> <p>You can also add a dependent/beneficiary outside of a life event or enrollment. You can modify your allocations to include the new dependent/beneficiary. You cannot enroll the new dependent/beneficiary in your medical, dental, or vision coverage outside of an open enrollment period or as part of a life event.</p> <p>In this topic, you will add your mother-in-law, Alice Jones as a beneficiary and will make her a secondary allocation for your life insurance.</p> <p>Adding Dependent/Beneficiaries outside of enrollment or a life event is done from the <b>Benefits Summary</b> component.</p>

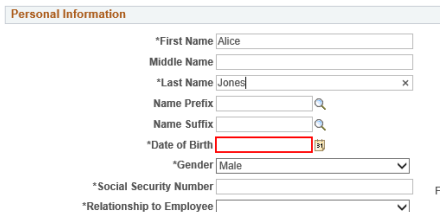
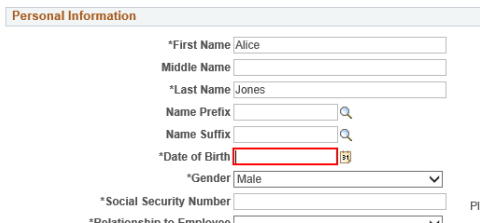
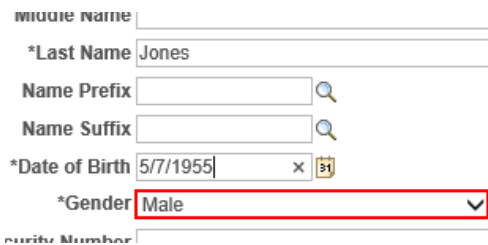
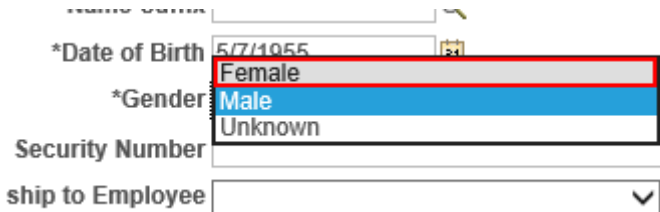
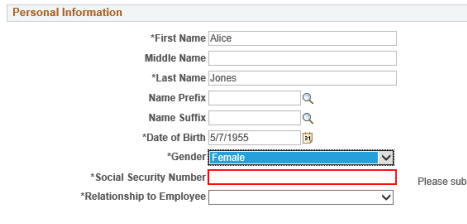


Step	Action
4.	<p>Click the <b>Benefits Summary</b> link.</p> 
5.	<p>The <b>Benefits Summary</b> page displays.</p> <p>This page lists your current enrollments. You can edit covered beneficiaries for your savings and life insurance plans. Beneficiaries added to one plan are available on all plans.</p> <p>For this example, you will use your basic life coverage.</p>
6.	<p>Click the <b>Basic Life</b> link.</p> 
7.	<p>The <b>Basic Life</b> details page displays.</p> <p>The <b>Covered Beneficiaries</b> section displays your current Dependents/Beneficiaries who have allocations for this plan.</p> <p>To add a new beneficiary, you will click the <b>Edit</b> button.</p>
8.	<p>Click the <b>Edit</b> button.</p> 
9.	<p>The <b>Change Current Beneficiaries and Allocations</b> page displays.</p> <p>You can use this page to edit allocations for Basic Life coverage. You can also use the page to add a beneficiary.</p> <p>For this example, you will add your mother-in-law as a Beneficiary.</p> <p>You will also change your allocations for Basic Life to include your mother-in-law as a second secondary allocation.</p>

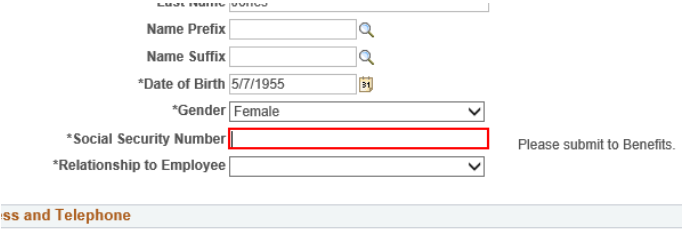
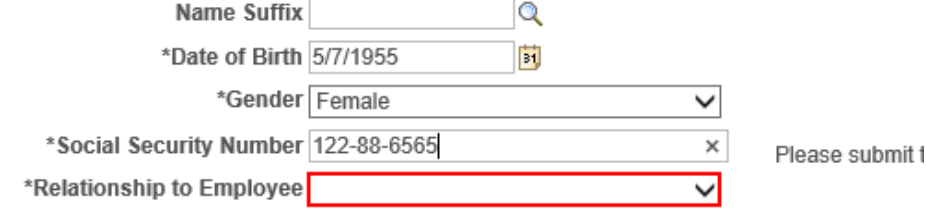
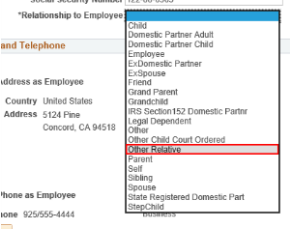


Step	Action																								
10.	<p>Click the <b>Add a New Beneficiary</b> button.</p> <div><div>Allocation Details</div><table><thead><tr><th></th><th>Name</th><th>Relationship</th><th>Current Primary Percent</th><th>Current Secondary Percent</th><th>New Prim Alloca</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>Mary Smith</td><td>Spouse</td><td>25</td><td></td><td><input type="text"/></td></tr><tr><td><input type="checkbox"/></td><td>Michael Smith</td><td>Child</td><td>75</td><td></td><td><input type="text"/></td></tr><tr><td><input type="checkbox"/></td><td>Peter Smith</td><td>Parent</td><td></td><td>100</td><td><input type="text"/></td></tr></tbody></table><div><div>Add a New Beneficiary</div><div>Update Totals</div><div>0</div></div></div>		Name	Relationship	Current Primary Percent	Current Secondary Percent	New Prim Alloca	<input type="checkbox"/>	Mary Smith	Spouse	25		<input type="text"/>	<input type="checkbox"/>	Michael Smith	Child	75		<input type="text"/>	<input type="checkbox"/>	Peter Smith	Parent		100	<input type="text"/>
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<input type="checkbox"/>	Michael Smith	Child	75		<input type="text"/>																				
<input type="checkbox"/>	Peter Smith	Parent		100	<input type="text"/>																				
11.	<p>The <b>Dependent/Beneficiary Personal Information</b> page displays in edit mode.</p> <p>You use this page to add your mother-in-law, Alice Jones, as a beneficiary.</p>																								
12.	<p>Click in the <b>First Name</b> field.</p> <div><div>1</div><div><div>*First Name</div><div><input type="text"/></div></div><div><div>Middle Name</div><div><input type="text"/></div></div><div><div>*Last Name</div><div><input type="text"/></div></div><div><div>Name Prefix</div><div><input type="text"/></div><div></div></div><div><div>Name Suffix</div><div><input type="text"/></div><div></div></div></div>																								
13.	<p>Enter the desired information into the <b>First Name</b> field. Enter a valid value e.g. "<b>Alice</b>".</p> <div><div>ation</div><div><div>*First Name</div><div><input type="text"/></div></div><div><div>Middle Name</div><div><input type="text"/></div></div><div><div>*Last Name</div><div><input type="text"/></div></div><div><div>Name Prefix</div><div><input type="text"/></div><div></div></div><div><div>Name Suffix</div><div><input type="text"/></div><div></div></div><div><div>*Date of Birth</div><div><input type="text"/></div><div></div></div></div>																								
14.	<p>Click in the <b>Last Name</b> field.</p> <div><div>tion</div><div><div>*First Name</div><div><input type="text" value="Alice"/></div><div></div></div><div><div>Middle Name</div><div><input type="text"/></div></div><div><div>*Last Name</div><div><input type="text"/></div></div><div><div>Name Prefix</div><div><input type="text"/></div><div></div></div><div><div>Name Suffix</div><div><input type="text"/></div><div></div></div><div><div>*Date of Birth</div><div><input type="text"/></div><div></div></div></div>																								
15.	<p>Enter the desired information into the <b>Last Name</b> field. Enter a valid value e.g. "<b>Jones</b>".</p> <div><div><div>*First Name</div><div><input type="text" value="Alice"/></div></div><div><div>Middle Name</div><div><input type="text"/></div></div><div><div>*Last Name</div><div><input type="text"/></div></div><div><div>Name Prefix</div><div><input type="text"/></div><div></div></div><div><div>Name Suffix</div><div><input type="text"/></div><div></div></div><div><div>*Date of Birth</div><div><input type="text"/></div><div></div></div><div><div>*Gender</div><div><input type="text" value="Male"/></div><div></div></div></div>																								

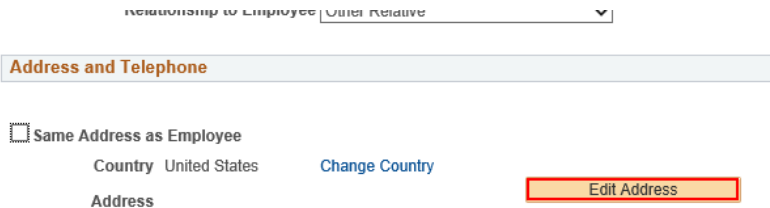
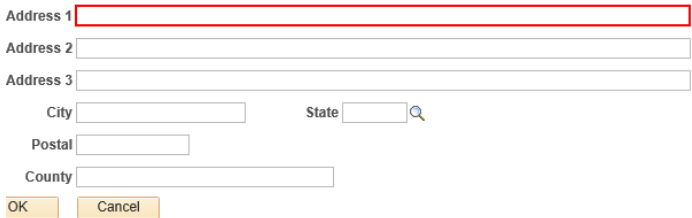
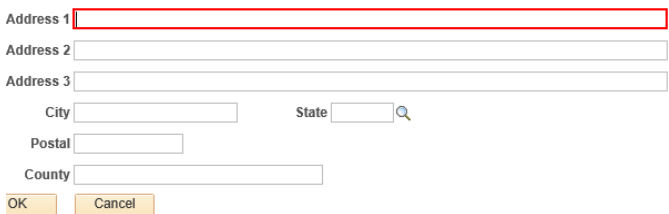
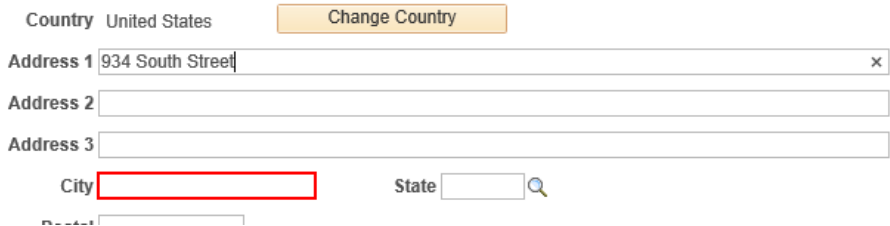


Step	Action
16.	<p>Click in the <b>Date of Birth</b> field.</p> 
17.	<p>Enter the desired information into the <b>Date of Birth</b> field. Enter a valid value e.g. <b>"5/7/1955"</b>.</p> 
18.	<p>Click the <b>Gender</b> list.</p> 
19.	<p>Click the <b>Female</b> list item.</p> 
20.	<p>Click in the <b>Social Security Number</b> field.</p> 



Step	Action
21.	<p>Enter the desired information into the <b>Social Security Number</b> field. Enter a valid value e.g. "<b>122-88-6565</b>".</p>  <p>ss and Telephone</p>
22.	<p>Click the <b>Relationship to Employee</b> list.</p>  <p>Please submit t</p>
23.	<p>Click the <b>Other Relative</b> list item.</p>  <p>Please submit t</p>
24.	<p>Alice's contact information is different from yours. You will begin by entering Alice's address.</p> <p>First, you will deselect the <b>Same Address as Employee</b> check box.</p>
25.	<p>Click the <b>Same Address as Employee</b> option.</p> <p>Address and Telephone</p> <p><input checked="" type="checkbox"/> Same Address as Employee</p> <p>Country United States Address 5124 Pine Concord, CA 94518</p>



Step	Action
26.	<p>Notice the address section no longer displays your address and an <b>Edit Address</b> button displays.</p> <p>The <b>Country</b> field displays United States. If you needed to change this, you could click the <b>Change Country</b> link and select the appropriate country from the pop up list that would display. For this example you do not have change the country.</p> <p>Alice's address is:</p> <p>934 South Street Rhinebeck, NY 12573</p>
27.	<p>Click the <b>Edit Address</b> button.</p> 
28.	<p>Click in the <b>Address 1</b> field.</p> 
29.	<p>Enter the desired information into the <b>Address 1</b> field. Enter a valid value e.g. "<b>934 South Street</b>".</p> 
30.	<p>Click in the <b>City</b> field.</p> 



Step	Action
31.	<p>Enter the desired information into the <b>City</b> field. Enter a valid value e.g. "<b>Rhinebeck</b>".</p> <p>Country United States <a href="#">Change Country</a></p> <p>Address 1 934 South Street</p> <p>Address 2</p> <p>Address 3</p> <p>City <input type="text"/> State <input type="text"/></p> <p>Postal <input type="text"/></p>
32.	<p>Click in the <b>State</b> field.</p> <p>Country United States <a href="#">Change Country</a></p> <p>Address 1 934 South Street</p> <p>Address 2</p> <p>Address 3</p> <p>City Rhinebeck <input type="text"/> State <input type="text"/></p> <p>Postal <input type="text"/></p> <p>Countv <input type="text"/></p>
33.	<p>Enter the desired information into the <b>State</b> field. Enter a valid value e.g. "<b>NY</b>".</p> <p><a href="#">Edit Address</a></p> <p>Country United States <a href="#">Change Country</a></p> <p>Address 1 934 South Street</p> <p>Address 2</p> <p>Address 3</p> <p>City Rhinebeck <input type="text"/> State <input type="text"/></p> <p>Postal <input type="text"/></p>
34.	<p>Click the <b>New York</b> object.</p> <p><input type="text"/> State NY <input type="text"/></p> <p><a href="#">State Description</a></p> <p>NY <b>New York</b></p>
35.	<p>Click in the <b>Postal</b> field.</p> <p>Address 3</p> <p>City Rhinebeck <input type="text"/> Sta</p> <p>Postal <input type="text"/></p> <p>County <input type="text"/></p>



Step	Action
36.	<p>Enter the desired information into the <b>Postal</b> field. Enter a valid value e.g. "<b>12573</b>".</p> <p>Address 2 <input type="text"/></p> <p>Address 3 <input type="text"/></p> <p>City <input type="text" value="Rhinebeck"/> State <input type="text" value="NY"/> </p> <p>Postal <input style="border: 2px solid red;" type="text"/></p> <p>County <input type="text"/></p>
37.	<p>Click the <b>OK</b> button.</p> <p>Address 2 <input type="text"/></p> <p>Address 3 <input type="text"/></p> <p>City <input type="text" value="Rhinebeck"/> State <input type="text" value="NY"/></p> <p>Postal <input type="text" value="12573"/> <input type="button" value="x"/></p> <p>County <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>
38.	<p>Notice the address you just entered now displays in the Address fields.</p> <p>Next, you will enter Alice's phone information. Her phone is 845-555-1212.</p> <p>You will start by deselecting the <b>Same Phone as Employee</b> check box.</p>
39.	<p>Click the <b>Same Phone as Employee</b> option.</p> <p><input type="checkbox"/> Same Address as Employee</p> <p>Country <input type="text" value="United States"/> <a href="#">Change Country</a></p> <p><input type="button" value="Edit Address"/></p> <p>Address 934 South Street Rhinebeck, NY 12573</p> <p><input checked="" type="checkbox"/> Same Phone as Employee</p> <p>Phone <input type="text" value="925/555-4444"/> Business</p>
40.	<p>A <b>Phone</b> field displays.</p> <p>You will enter Alice's phone number in this field.</p>
41.	<p>Click in the <b>Phone</b> field.</p> <p><input type="checkbox"/> Same Phone as Employee</p> <p>Phone <input style="border: 2px solid red;" type="text"/></p>





Step	Action
42.	<p>Enter the desired information into the <b>Phone</b> field. Enter a valid value e.g. "<b>845/555-1212</b>".</p> <p><input type="checkbox"/> Same Phone as Employee</p> <p>Phone <input type="text"/></p> <p><input type="button" value="Save"/></p>
43.	<p>Click the <b>Save</b> button.</p> <p><input type="checkbox"/> Same Phone as Employee</p> <p>Phone <input type="text" value="845/555-1212"/></p> <p><input type="button" value="Save"/></p>
44.	<p>Click the <b>OK</b> button.</p> <p><u>Personal Information</u></p> <p>Save Confirmation</p> <p>✓ The Save was successful.</p> <p><input type="button" value="OK"/></p>
45.	<p>Click the scrollbar.</p>
46.	<p>Now, you will change allocations for your Basic Life coverage. To do so, you must navigate back to the <b>Basic Life</b> page.</p> <p>You can begin by clicking <b>Benefits Summary</b> in the breadcrumbs menu and then the <b>Basic Life</b> link on the <b>Benefits Summary</b> page.</p> <p>You can also use the <b>Benefits Home</b> button. Then click the <b>Benefits Summary</b> link, and then the <b>Basic Life</b> link.</p> <p>For this example, you will use the breadcrumbs menu.</p>
47.	<p>Click the <b>Benefits Summary</b> menu.</p> <p><b>Favorites</b> ▾ <b>Main Menu</b> ▾ &gt; <b>Benefits Summary</b></p> <p>ORACLE® <input type="button" value="All"/> <input type="button" value="Search"/></p> <p>Dependent/Beneficiary's personal information as of Aug 24, 2017.</p>

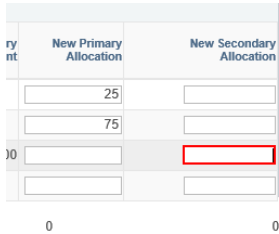
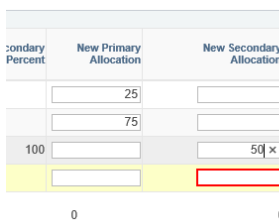
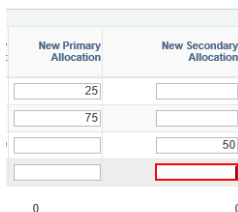
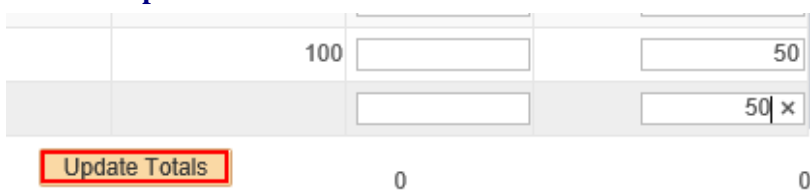


Step	Action																																
48.	<p>Click the <b>Basic Life</b> link.</p> <table><tr><th colspan="3">Benefits Summary</th></tr><tr><th>Type of Benefit</th><th>Plan Description</th><th>Coverage or Partic</th></tr><tr><td>NonPERS Medical</td><td>Kaiser HMO Plan A</td><td>Family</td></tr><tr><td>Dental PPO</td><td>Delta Dental PPO w/KSR/HN</td><td>Family</td></tr><tr><td>Voluntary Vision Plan</td><td>VSP Voluntary Vision Plan</td><td>Family</td></tr><tr><td>Dental HMO</td><td></td><td>Waived</td></tr><tr><td>Basic Life</td><td>Basic Life 10000 ER</td><td>\$10,000</td></tr><tr><td>Spouse Life and AD &amp; D</td><td></td><td>Waived</td></tr></table>	Benefits Summary			Type of Benefit	Plan Description	Coverage or Partic	NonPERS Medical	Kaiser HMO Plan A	Family	Dental PPO	Delta Dental PPO w/KSR/HN	Family	Voluntary Vision Plan	VSP Voluntary Vision Plan	Family	Dental HMO		Waived	Basic Life	Basic Life 10000 ER	\$10,000	Spouse Life and AD & D		Waived								
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Spouse Life and AD & D		Waived																															
49.	<p>The <b>Basic Life</b> page displays your current allocations.</p> <p>Your mother-in-law, Alice Jones, does not appear in the <b>Dep/Ben Coverage Details</b> grid, because you have not yet created an allocation for her.</p> <p>For this example you will create a <b>Secondary Allocation</b> for her of 50%.</p>																																
50.	<p>Click the <b>Edit</b> button.</p> <table><tr><th colspan="4">Covered Beneficiaries</th></tr><tr><td colspan="4">Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.</td></tr><tr><th colspan="4">Dep/Ben Coverage Details</th></tr><tr><th>Name</th><th>Relationship to Employee</th><th>Primary Allocation</th><th>Secondary Allocation</th></tr><tr><td>Smith, Mary</td><td>Spouse</td><td>25%</td><td></td></tr><tr><td>Smith, Michael</td><td>Child</td><td>75%</td><td></td></tr><tr><td>Smith, Peter</td><td>Parent</td><td></td><td>100%</td></tr><tr><td colspan="4"><b>Edit</b></td></tr></table>	Covered Beneficiaries				Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.				Dep/Ben Coverage Details				Name	Relationship to Employee	Primary Allocation	Secondary Allocation	Smith, Mary	Spouse	25%		Smith, Michael	Child	75%		Smith, Peter	Parent		100%	<b>Edit</b>			
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51.	<p>The <b>Change Current Beneficiaries and Allocations</b> page displays.</p> <p>The beneficiary you just added now appears in the <b>Allocation Details</b> grid. No allocations have been assigned to this beneficiary.</p> <p>Now, you will add Alice as a secondary allocation.</p>																																
52.	<p>The <b>Allocations Details</b> section display’s the current Allocation:</p> <p>25% is allocated to your husband and 75% to your child as primary allocations and 100% to your father as a secondary allocation. You must re-enter these in the <b>New Primary Allocation</b> fields.</p> <p>You will add your mother-in-law as a secondary allocation of 50%. To do so you will have to reduce the Allocation to your father to 50%.</p> <p>Remember the totals of the new allocations fields for primary and secondary allocations must each total to 100%.</p>																																

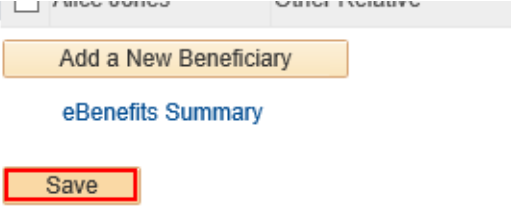
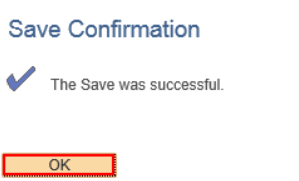
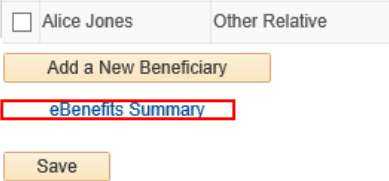
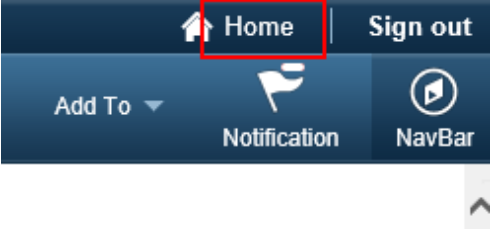


Step	Action															
53.	<p>Click in the <b>New Primary Allocation</b> field.</p> <table><tr><th>Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>100</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr></table>	Secondary Percent	New Primary Allocation	New Secondary Allocation		<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	100	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
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100	<input type="text"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														
54.	<p>Enter the desired information into the <b>New Primary Allocation</b> field. Enter a valid value e.g. "25".</p> <table><tr><th>Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>100</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr></table> <p>00</p>	Secondary Percent	New Primary Allocation	New Secondary Allocation		<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	100	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
Secondary Percent	New Primary Allocation	New Secondary Allocation														
	<input type="text"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														
100	<input type="text"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														
55.	<p>Click in the <b>New Primary Allocation</b> field.</p> <table><tr><th>Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><input type="text" value="25"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>100</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr></table> <p>00</p>	Secondary Percent	New Primary Allocation	New Secondary Allocation		<input type="text" value="25"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	100	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
Secondary Percent	New Primary Allocation	New Secondary Allocation														
	<input type="text" value="25"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														
100	<input type="text"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														
56.	<p>Enter the desired information into the <b>New Primary Allocation</b> field. Enter a valid value e.g. "75".</p> <table><tr><th>Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><input type="text" value="25"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>100</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr></table> <p>00</p>	Secondary Percent	New Primary Allocation	New Secondary Allocation		<input type="text" value="25"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	100	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
Secondary Percent	New Primary Allocation	New Secondary Allocation														
	<input type="text" value="25"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														
100	<input type="text"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														
57.	<p>Click in the <b>New Secondary Allocation</b> field.</p> <table><tr><th>Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><input type="text" value="25"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text" value="75"/></td><td><input type="text"/></td></tr><tr><td>100</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr></table> <p>00</p>	Secondary Percent	New Primary Allocation	New Secondary Allocation		<input type="text" value="25"/>	<input type="text"/>		<input type="text" value="75"/>	<input type="text"/>	100	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
Secondary Percent	New Primary Allocation	New Secondary Allocation														
	<input type="text" value="25"/>	<input type="text"/>														
	<input type="text" value="75"/>	<input type="text"/>														
100	<input type="text"/>	<input type="text"/>														
	<input type="text"/>	<input type="text"/>														



Step	Action
58.	<p>Enter the desired information into the <b>New Secondary Allocation</b> field. Enter a valid value e.g. "<b>50</b>".</p> 
59.	<p>Click in the <b>New Secondary Allocation</b> field.</p> 
60.	<p>Enter the desired information into the <b>New Secondary Allocation</b> field. Enter a valid value e.g. "<b>50</b>".</p> 
61.	<p>You will use the Update Totals button to be sure that your allocations total 100.</p> <p>Click the <b>Update Totals</b> button.</p> 
62.	<p>Notice both primary and secondary allocations total 100. If you have allocate more than 100% the system will generate and error message. If you allocate less than 100% the system will generate an error message when you click the save button. In either case, the system will not allow you to save your changes, if you have not allocated exactly 100%. You do not have to create secondary allocations. You must create primary allocations</p> <p>You cannot create primary and secondary allocations for the same beneficiary. A beneficiary cannot be used for both a primary and a secondary allocation. The system generates an error message when you attempt to save your changes.</p>



Step	Action
63.	<p>If you receive an error message, click the <b>OK</b> button to close it and then make the necessary changes by adjust the new primary and secondary allocations.</p> <p>If you decide to cancel you changes without saving them, click <b>eBenefits Summary</b> link. The system will navigate to the <b>Benefits Summary</b> page.</p> <p>For this example you will save your changes.</p>
64.	<p>Click the <b>Save</b> button.</p> 
65.	<p>Click the <b>OK</b> button.</p> 
66.	<p>Click the <b>eBenefits Summary</b> link.</p> 
67.	<p>Click the <b>Home</b> link.</p> 
68.	<p><b>End of Procedure.</b></p>