Adding a Beneficiary/Dependent

| Step | Action | | | | |
|------|--|--|--|--|--|
| 1. | Click Benefits tile. | | | | |
| | Benefits Payroll Image: Second Details Image: Second Details | | | | |
| 2. | The Benefits Self Service 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. | | | | |
| | This page contains the links that you use to review and manage your benefits information. These links allow you to | | | | |
| | Review benefits summary information—to see your current or past benefits elections Review and/or edit your Dependent and beneficiary information Update your benefits information after you have experienced a qualifying Life Event—marriage, birth of a child, divorce, adoption, etc. Enroll in benefits during an open enrollment period and/or at the time of hire Upload documents in support of a qualifying life event or dependent verification Access benefits guides, forms, and provider links Request a CVC Voucher | | | | |
| 3. | You can add a dependent/beneficiary during enrollment and as part of a life event. These are covered in other topics. | | | | |
| | 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. | | | | |
| | In this topic, you will add your father, Peter Smith as a beneficiary. | | | | |
| | Adding Dependent/Beneficiaries outside of enrollment or a life event is done from the Benefits Summary component. | | | | |



| Step | Action | | | | | | |
|------|---|---------------------------------------|---------------------------|---|--------------------|--|--|
| 4. | Click the Benefits Summary link. | | | | | | |
| | Benefits Self Service | | | | | | |
| | Benefits Self Service | | | | | | |
| | Benefits Employee Self | | | ▲ Life Events | | | |
| | Benefits S Review a su enrollments | immary of current, past (| or future benefit | Process Life Even include Marriage, Adoption. | | | |
| | |) | | 0 | | | |
| 5 | | Reneficiary Info | a diamlaria | | | | |
| 5. | The Benefits S | ummary Pag | e displays. | | | | |
| | | | | You can edit covere ciaries added to one p | | | |
| | For this example | le, You will u | se your bas | sic life coverage. | | | |
| 6. | 6. Click the Basic Life link. | | | | | | |
| | Benefits Summary | | | | | | |
| | Type of Benefit NonPERS Medical | Plan Description Kaiser HMO Plan A | Coverage or Pau Family | | | | |
| | Dental PP0 | Delta Dental PPO w/KSR/HN | Family | | | | |
| | Voluntary Vision Plan | VSP Voluntary Vision Plan | Family | | | | |
| | Dental HMO | | Waived | | | | |
| | Basic Life Spouse Life and AD & D | Basic Life 10000 ER | \$10,000 Waived | | | | |
| 7. | The Basic Life details page displays. The Covered Beneficiaries section displays your current Dependents/Beneficiaries who have allocations for this plan. To add a new beneficiary, click the Edit button. | | | | | | |
| 8. | | | | | | | |
| | Name | | hip to Employe | e Primary Allocat | ion Secondary Alle | | |
| | Smith,Mary | Spouse | | 3 | 3% | | |
| | Smith,Michael | Child | | 6 | 7% | | |
| | Edit | | | | | | |
| 9. | The Change C | urrent Benef | iciaries an | d Allocations page d | isplays. | | |
| | You can use this page to edit allocations for Basic Life coverage. You can also use the page to add a beneficiary. | | | | | | |
| | For this example | le, you will ac | ld your fath | er as a beneficiary. | | | |
| | Changing alloc | ations is cove | red in other | topics in this trainin | g | | |



| Step | Action | | | | |
|------|---|--|--|--|--|
| 10. | Click the Add a New Beneficiary button. | | | | |
| | Allocation Details Name Relationship Current Prim Perce Mary Smith Spouse Image: Current Prim Perce Michael Smith Child Image: Current Prim Perce Michael Smith Child Image: Current Prim Perce | | | | |
| | eBenefits Summary | | | | |
| 11. | The Dependent/Beneficiary Personal Information page displays in edit mode. | | | | |
| | You will use this page to add your father, Peter Smith as a beneficiary. | | | | |
| 12. | Click in the First Name field. | | | | |
| | *First Name | | | | |
| | Middle Name | | | | |
| | *Last Name | | | | |
| 13. | Enter the desired information into the First Name field. Enter a valid value e.g. " Peter ". Select Save once you have added your Dependent/Beneficiary's personal information. Tr information will go into effect as of Aug 14, 2017. Personal Information | | | | |
| | *First Name | | | | |
| 14. | Click in the Last Name field. Don Smith Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Aug 14, 2017. Personal Information *First Name Peter! x Middle Name *Last Name Name PrefixQ | | | | |
| 15. | Enter the desired information into the Last Name field. Enter a valid value e.g. "Smith". Don Smith Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Aug 14, 2017. Personal Information *First Name Peter Middle Name *Last Name Name Prefix Q | | | | |



| Step | Action |
|------|---|
| 16. | Peter's birthday is 9/7/1951. |
| | Click in the Date of Birth field. Information will go into effect as of Aug 14, 2017. Personal Information *First Name Peter Middle Name *Last Name Smitth Name Prefix Name Prefix Q Name Prefix Q *Date of Birth Bir *Gender Male |
| 17. | Enter the desired information into the Date of Birth field. Enter a valid value e.g. "9/7/1951". Do Snill SeteSave one you have added your Dependent/Enenticary's personal information. This information will go into effect as of Aug 14, 2017. Personal Information "First Name Prefix "ast Name Sintax" |
| 18. | Peter's Social Security number is 123-58-6543. Click in the Social Security Number field. Personal Information *First Name Prefix *Last Name Stiffx Name Stiffx *Date of Birth 977/1951 _ x is *Gender Male *social Security Number Please submit to Benefits. |
| 19. | Enter the desired information into the Social Security Number field. Enter a valid value e.g. "123-58-6543". *Last Name Smith Name Prefix Name Suffix Date of Birth 977/1951 *Gender Male *Social Security Number Please 5 |



| Step | Action |
|------|--|
| 20. | Click the Relationship to Employee list. |
| | Name Suffix |
| | *Date of Birth 09/07/1951 |
| | *Gender Male |
| | *Social Security Number 123-58-6543 Please submit |
| | *Relationship to Employee |
| | |
| 21. | Click the Parent list item. |
| | *Relationship to Employee Child Child Domesic Partner Adult Domesic Partner Child |
| | Employee E-DOmeste Partner E-Sopouse Uddress as Employee Friend |
| | Grand Parent Country United States Grand/bild IRS Section152 Domesic Partur Address 5124 Pine Legal Dependent |
| | Concord, CA 94518 Other Other Flatdwe Parent |
| | Solid Shing Spoule None as Employee State Registered Domestic Part |
| | |
| 22. | Peter lives with you. The Same Address as Employee and the Same Phone as Employee check boxes are selected by default. |
| | check boxes are selected by default. |
| | If Peter's contact information were different from yours, you could deselect these check |
| | boxes and add address and phone information for Peter. |
| | For this example you will leave these check boxes selected. |
| | For this example you will leave these check boxes selected. |
| | You are now ready to save Peter's information. |
| 23. | Click the Save button. |
| | |
| | |
| | |
| | Same Phone as Employee |
| | Phone 925/555-4444 Business Save |
| | |
| 24. | Click the OK button. |
| | OK |
| 25. | Click the Self Service Home button. |
| | |
| | A serve Dhare on Employee |
| | Same Phone as Employee |
| | Phone 925/555-4444 Business |
| | |
| | Benefits Home Self Service Home |

