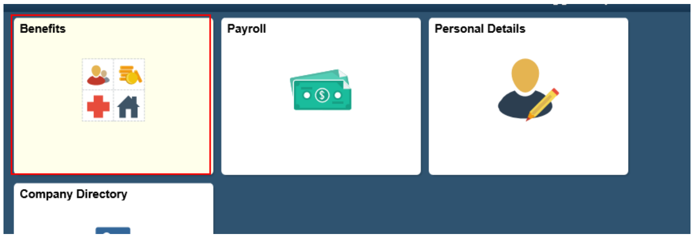
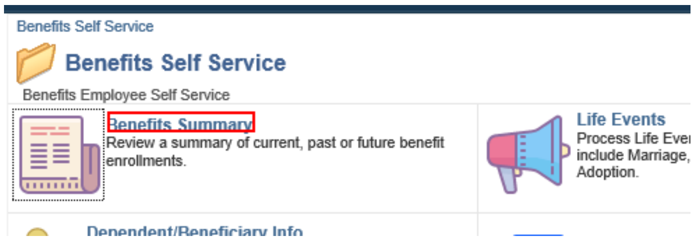
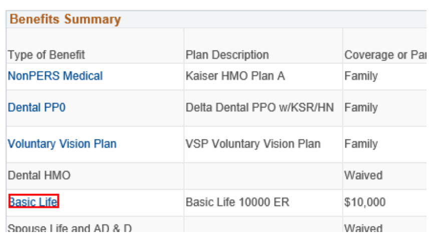
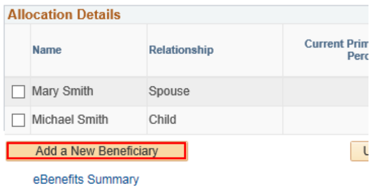
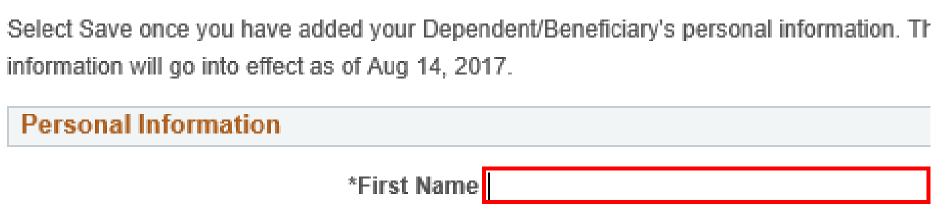
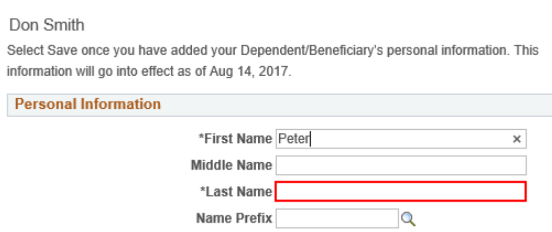
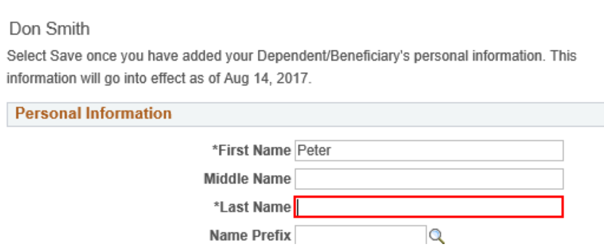
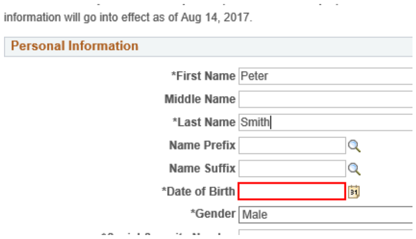
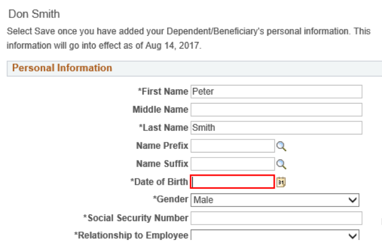
Adding a Beneficiary/Dependent

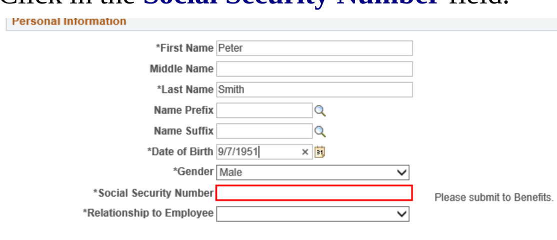
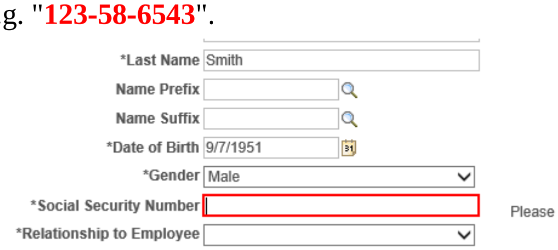
Step	Action
1.	Click **Benefits** tile. 
2.	The **Benefits Self Service** page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid. This page contains the links that you use to review and manage your benefits information. 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.

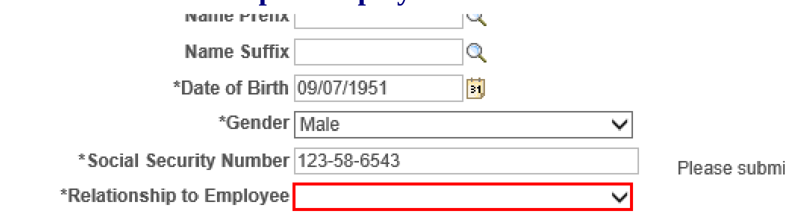
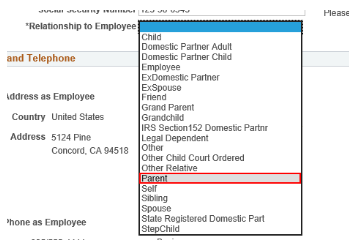
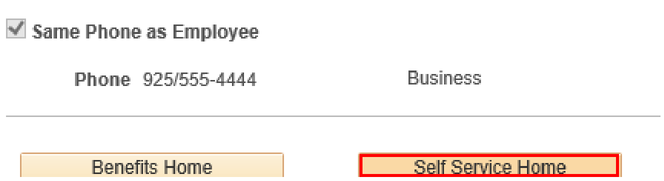
Step	Action
4.	Click the **Benefits Summary** link. 
5.	The **Benefits Summary Page** displays. This page lists your current enrollments. You can edit covered beneficiaries for your savings and life insurance plans. Beneficiaries added to one plan are available on all plans. For this example, You will use your basic life coverage.
6.	Click the **Basic Life** link. 
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.	Click the **Edit** button. 
9.	The **Change Current Beneficiaries and Allocations** page displays. 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, you will add your father as a beneficiary. Changing allocations is covered in other topics in this training.

Step	Action
10.	Click the **Add a New Beneficiary** button. 
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. 
13.	Enter the desired information into the **First Name** field. Enter a valid value e.g. "**Peter**". 
14.	Click in the **Last Name** field. 
15.	Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Smith**". 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16.</td><td>Peter's birthday is 9/7/1951.

Click in the Date of Birth field.

</td></tr>
<tr><td>17.</td><td>Enter the desired information into the Date of Birth field. Enter a valid value e.g. "9/7/1951".

</td></tr>
<tr><td>18.</td><td>Peter's Social Security number is 123-58-6543.

Click in the Social Security Number field.

</td></tr>
<tr><td>19.</td><td>Enter the desired information into the Social Security Number field. Enter a valid value e.g. "123-58-6543".

</td></tr>
</table>

Step	Action
20.	Click the **Relationship to Employee** list. 
21.	Click the **Parent** list item. 
22.	Peter lives with you. The **Same Address as Employee** and the **Same Phone as Employee** 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. You are now ready to save Peter's information.
23.	Click the **Save** button. 
24.	Click the **OK** button. 
25.	Click the **Self Service Home** button. 

Step	Action
26.	**End of Procedure.**