Contra Costa County
PeopleSoft Training
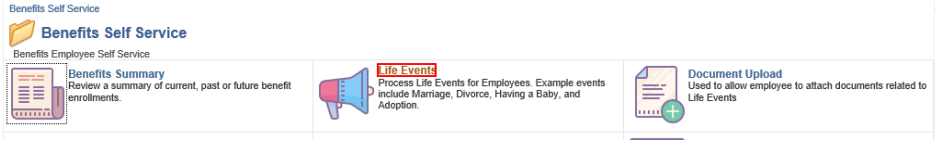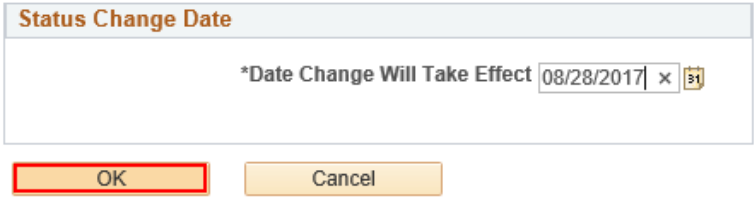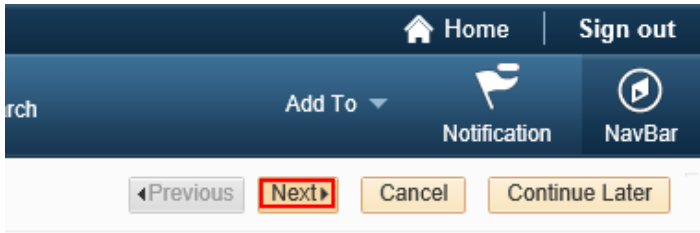
Birth

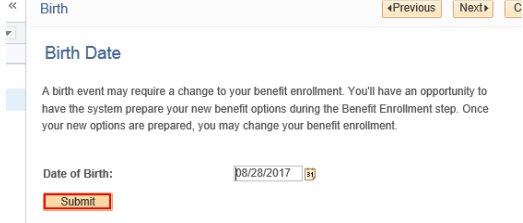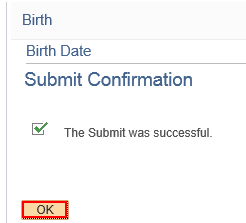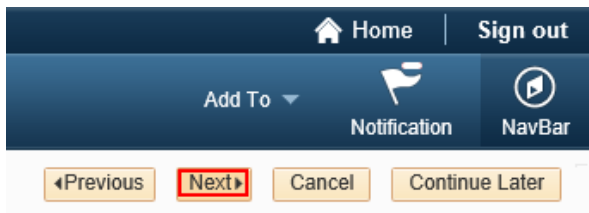| Step	Action
1.	Click the **Benefits** tile.
2.	The **Benefits Self Service** page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid. This page contains the links that you use to review and manage your benefits 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 Each of these links is covered in topics in Employee Self Service training.
3.	Click the **Life Events** link.
4.	The **Life Events** page displays. Use this page to select the type of life event you experienced. The system provides a guided process that walks you through the steps necessary to complete a life event For this example you will select Birth of a Child.

Step	Action
5.	You can only process one life event at a time. The life event pages contain a **Cancel** button and a **Continue Later** button. **Cancel** cancels the life event and discards any changes you made. **Continue Later** saves the changes you made and allows you to continue processing the life event at a later date. If you have started life event, and decided to continue it later, the Life Events page will indicate that you have an event in progress. It will also display a **Continue My Life Event** button. You will not be able to start another until you either complete the event in progress or cancel it.
6.	Click the **Birth of a Child** option. Employee ☐ Marriage ◉ Birth of a Child ○ Adopted or Gained Legal Custody/Guardianship of a child ○ Divorce or Legal Separation ○ Loss of Coverage Elsewhere ○ Gain of Coverage Elsewhere ○ Add/Remove a Domestic Partner ○ Death of a Dependent ○ Deferred Compensation Contribution Change Return to Benefits Self Service
7.	The **Change Status Date** displays. Use the **Date Change Will Take Effect** to enter your child was born. Your child was born on 8/28/20127 For this example you will enter 8/28/2017 in the **Date Change Will Take Effect** field. Note: you must complete the life event within 30 days of the date of your child's birth.
8.	Click in the **Date Change Will Take Effect** field. **Status Change Date** *Date Change Will Take Effect [_____] 📅
9.	Enter the desired information into the **Date Change Will Take Effect** field. Enter a valid value e.g. "**08/28/2017**". **Status Change Date** *Date Change Will Take Effect [_____] 📅

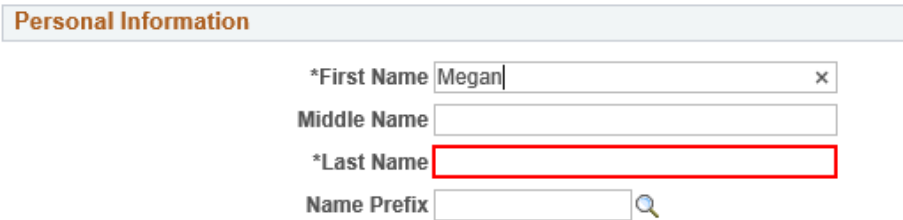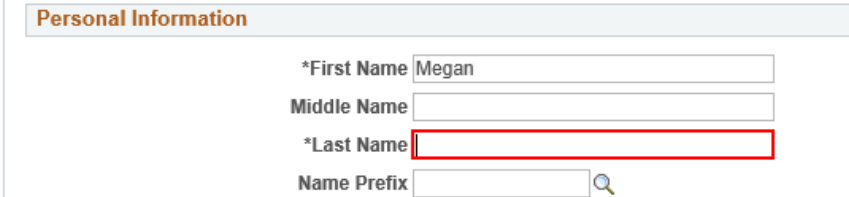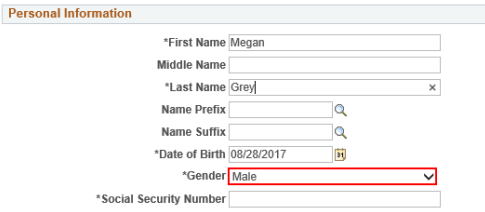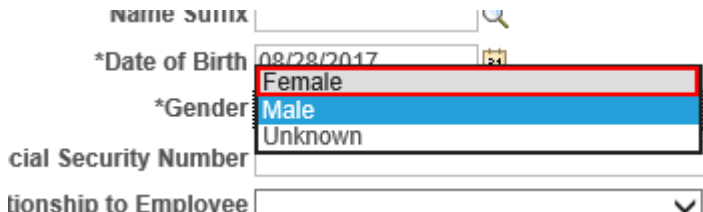| Step	Action
10.	Click the **OK** button.
11.	The **Welcome to the Birth Event** page displays. Review the information in the welcome message. Then begin the process.
12.	This page, as will all life event pages, displays the activity guide. The panel on the left lists all the steps necessary to complete a life event and an indicator that indicates the status of each step. You can use the collapse panel button to hide or display this panel. Hiding the panel allows you to work with the right side panel without having to use the scroll bar. Initially you will leave this panel open. Later in the process, you will collapse the panel. **Note:** the Activity Guide indicates that you have completed the **Welcome** step.
13.	A set of buttons display at the top right. These buttons allow you to advance through the steps in the life event process. After the initial page in the process, the buttons allow you to move forward and/or back to previous steps in the process. Use the **Cancel** button to cancel the event without saving any changes you have made. Use the **Continue Later** button, to save any changes you have made and to continue processing the event at another time.
14.	Begin the process by clicking the **Next** button. Click the **Next** button.
15.	The **Birth Date** page displays. The **Date of Birth** field displays the date you previously entered. This should reflect your child's birth date. You can edit the value in this field, if necessary. For this example, you will not edit this value.

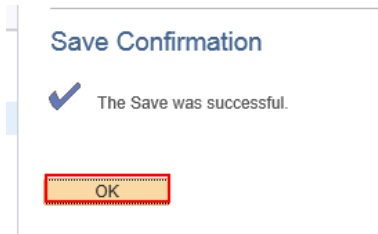| Step	Action
16.	You are now ready to submit your information. Click the **Submit** button. Birth ◀Previous Next▶ Birth Date A birth event may require a change to your benefit enrollment. You'll have an opportunity to have the system prepare your new benefit options during the Benefit Enrollment step. Once your new options are prepared, you may change your benefit enrollment. Date of Birth: 08/28/2017 📅 Submit
17.	Click the **OK** button. Birth Birth Date Submit Confirmation ✓ The Submit was successful. OK
18.	The **Birth Date** page displays in view only mode. If you need to change the date, use the **Previous** button to return to the previous step. You will be able to edit this date. Note the **Activity Guide** indicates that the **Birth Date** step is complete. You are now ready to move to the next step, **Update Dependent and Beneficiary**.
19.	Click the **Next** button. 🏠 Home | Sign out Add To ▼ Notification NavBar ◀Previous Next▶ Cancel Continue Later

Step	Action
20.	The **Add/Review Dependent/Beneficiary** page displays. The activity guide indicates that you are on the next step in the process--**Update Dependent and Beneficiary**. In this step, you will add your new child, Megan, as a dependent/beneficiary. Doing so will make her eligible for coverage under your medical and dental plans and for allocations on your life insurance and/or deferred compensation plans. You can also edit information for your existing dependent/beneficiaries. You can also edit this information outside of a life event using the **Benefits Summary** page or the **Dependent and Beneficiary Info** component. These are covered in other topics in eBenefits training. For this topic you will not edit your existing dependent/beneficiary's information.
21.	Click the **Add a dependent or beneficiary** button. pushbutton. **Dependent and Beneficiary Information** | Name	Relationship to Employee	Date of Birth	Marital Status	Dependent	Beneficiary
---	---	---	---	---	---
Michelle Grey	Child	05/16/2008	Single	Yes	Yes
Susan Grey	Spouse	05/13/1973	Married	Yes	Yes
Tracy Grey	Child	06/12/2011	Single	Yes	Yes	 Add a dependent or beneficiary
22.	Click in the **First Name** field. **Personal Information** *First Name Middle Name *Last Name Name Prefix Name Suffix *Date of Birth 08/28/2017 *Gender Male
23.	Enter the desired information into the **First Name** field. Enter a valid value e.g. "**Megan**". **Personal Information** *First Name Middle Name *Last Name Name Prefix
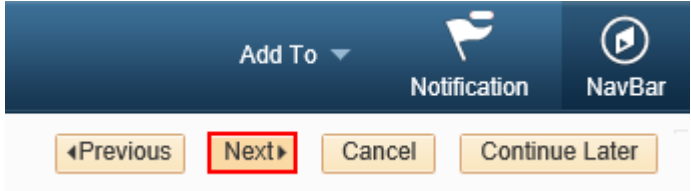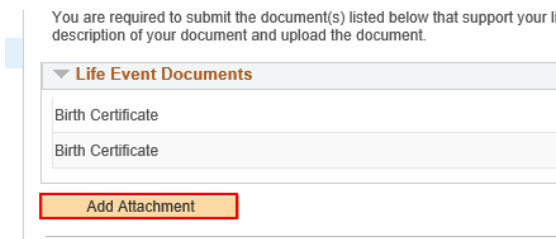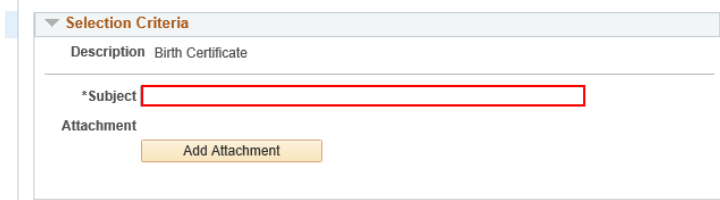
Step	Action
24.	Click in the **Last Name** field.
25.	Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Grey**".
26.	Notice, the **Date of Birth** field automatically populates based on information you provided earlier.
27.	Click the **Gender** list.
28.	Click the **Female** list item.
29.	If you have a Social Security Number for your new child, enter it here. If you have not yet obtained a Social Security number for the new child, you can skip the **Social Security Number** field. For this example, you do not yet have a Social Security number for your new child. You will skip this field.

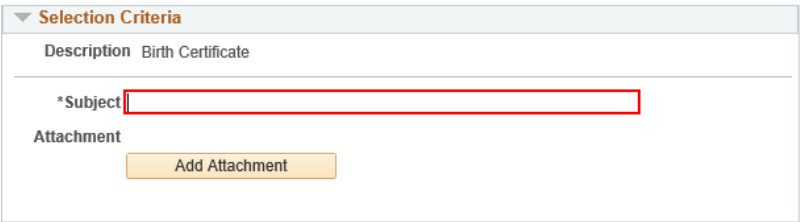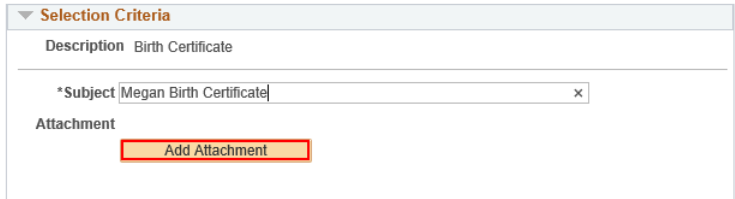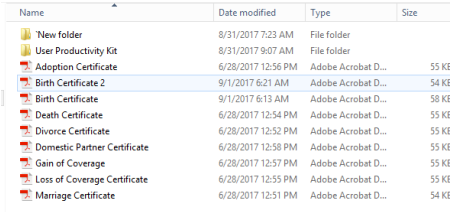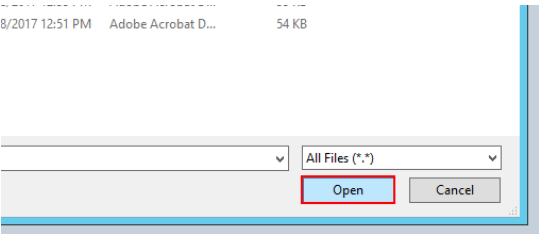| Step	Action
30.	Click the **Relationship to Employee** list. Name Suffix [　　　　　] 🔍 *Date of Birth 08/28/2017 📅 *Gender Female ▼ *Social Security Number [　　　　　] *Relationship to Employee [　　　　　▼]
31.	Click the **Child** list item. ployee Child Domestic Partner Adult Domestic Partner Child Employee ExDomestic Partner ExSpouse Friend Grand Parent Grandchild IRS Section152 Domestic Partnr Legal Dependent 94553 Other Other Child Court Ordered Other Relative Parent Self Sibling Spouse State Registered Domestic Part StepChild
32.	Click the scrollbar to move to the bottom of the page.
33.	Generally, you will leave the **Same Address as Employee** and **Same Phone as Employee** check boxes selected. If your address has changed, use eProfile to update your new address information. Do not make that change here. In this example you will leave these check boxes selected.
34.	Click the **Save** button. ☑ Same Address as Employee Country United States Address 30 Douglas Martinez, CA 94553 ☑ Same Phone as Employee Phone 925/555-1414 Home [Save]
35.	Click the **OK** button. Save Confirmation ✔ The Save was successful. [OK]

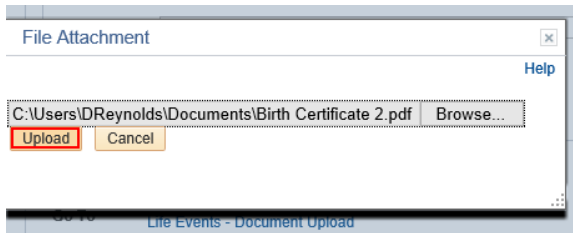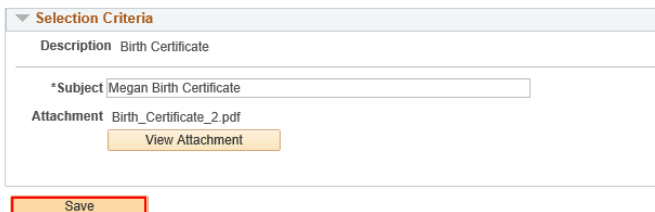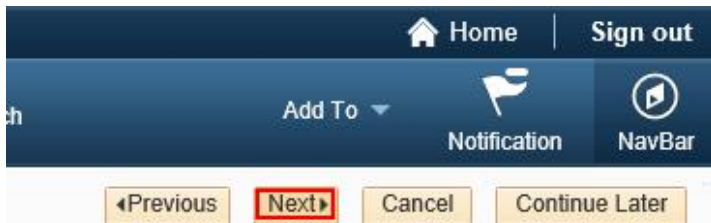| Step	Action
36.	Notice, your new child now appears in the **Dependent and Beneficiary Information** section. The **Activity Guide** indicates that you have completed the **Update Dependent and Beneficiary** step. You are now ready to go on to the next step, **Document Upload**.
37.	Click the **Next** button. Add To ▾ Notification NavBar ◀Previous Next▶ Cancel Continue Later
38.	The **Life Events - Document Upload** page displays. The Activity Guide indicates that this step is in progress. The * indicates that this step is a required step. You can not skip it. The **Life Event Documents** section lists the types of documents required. You need to upload a copy of your child's birth certificate. If you only have a paper copy of this document, you will have to scan it and save it as a pdf in order to upload it Uploading and working with uploaded documents outside of a life event is covered in other topics in eBenefits training. For this example, you will upload a copy of your child's birth certificate.
39.	Click the **Add Attachment** button. You are required to submit the document(s) listed below that support your li description of your document and upload the document. ▼ Life Event Documents Birth Certificate Birth Certificate Add Attachment
40.	You must enter a description in the **Subject** field. This is a required field.
41.	Click in the **Subject** field. You have chosen to enter a new attachment. ▼ Selection Criteria Description Birth Certificate *Subject Attachment Add Attachment

Step	Action
42.	Enter the desired information into the **Subject** field. Enter a valid value e.g. "**Megan Birth Certificate**". ▼ Selection Criteria Description Birth Certificate *Subject [ ] Attachment Add Attachment
43.	Click the **Add Attachment** button. You have chosen to enter a new attachment. ▼ Selection Criteria Description Birth Certificate *Subject Megan Birth Certificate × Attachment Add Attachment
44.	The **File Attachment** window displays. Use this window to locate and upload the marriage certificate.
45.	Click in the **Help** field. File Attachment × Help [ ] Browse... Upload Cancel
46.	Click the **Birth Certificate 2** list item. Name / Date modified / Type / Size 'New folder 8/31/2017 7:23 AM File folder User Productivity Kit 8/31/2017 9:07 AM File folder Adoption Certificate 6/28/2017 12:56 PM Adobe Acrobat D... 55 KB Birth Certificate 2 9/1/2017 6:21 AM Adobe Acrobat D... 54 KB Birth Certificate 9/1/2017 6:13 AM Adobe Acrobat D... 58 KB Death Certificate 6/28/2017 12:54 PM Adobe Acrobat D... 55 KB Divorce Certificate 6/28/2017 12:52 PM Adobe Acrobat D... 55 KB Domestic Partner Certificate 6/28/2017 12:58 PM Adobe Acrobat D... 55 KB Gain of Coverage 6/28/2017 12:57 PM Adobe Acrobat D... 55 KB Loss of Coverage Certificate 6/28/2017 12:55 PM Adobe Acrobat D... 55 KB Marriage Certificate 6/28/2017 12:51 PM Adobe Acrobat D... 54 KB
47.	Click the **Open** button. 8/2017 12:51 PM Adobe Acrobat D... 54 KB [ ] ∨ All Files (*.*) ∨ Open Cancel

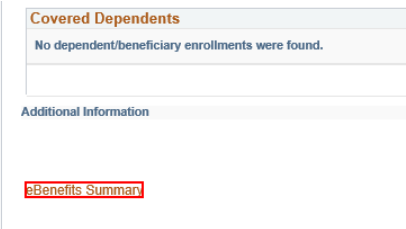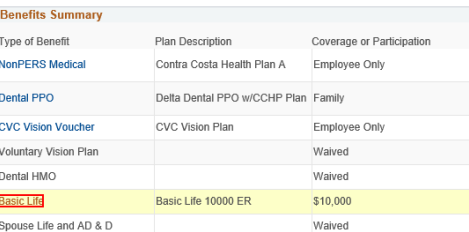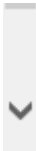| Step	Action
48.	Click the **Upload** button. File Attachment ☒ Help C:\Users\DReynolds\Documents\Birth Certificate 2.pdf Browse... Upload Cancel Life Events - Document Upload
49.	The **Document Definition - New Attachment** page displays. the **Selection Criteria** section displays the subject you entered previously and the name of the file you uploaded, in this case Birth_Certificate_2.pdf. You can use the **View Attachment** button to view the attachment. For this example, you will not use this button. Viewing attachments is covered in the document upload portion of eBenefits training.
50.	Click the **Save** button. Selection Criteria Description Birth Certificate *Subject Megan Birth Certificate Attachment Birth_Certificate_2.pdf View Attachment Save
51.	The **Life Events - Documents Upload** page displays. The **Activity Guide** indicates that you have completed the **Document Upload** step. You can use this page to upload additional documents (click the **Add Attachment** button). You can also use this page to delete the document. Deleting uploaded documents is covered in the document upload portion of eBenefits training. The next step is to view your benefits summary information.
52.	Click the **Next** button. 🏠 Home Sign out Add To ▾ Notification NavBar ◀Previous Next▶ Cancel Continue Later

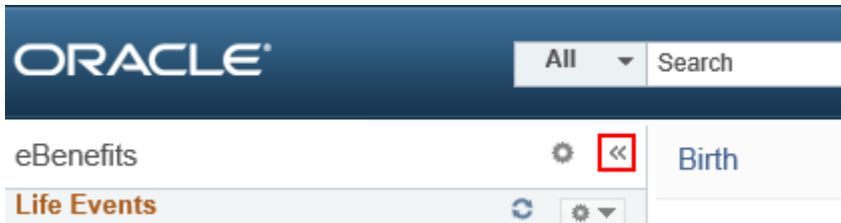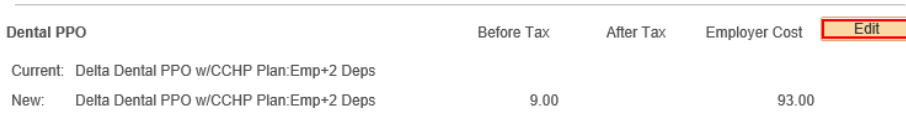| Step	Action
53.	The **Benefits Summary** page displays. This is the same page that you can access from the **Benefits Summary** link on the **Benefits Self Service** home page. Use if this page is covered in other portions of eBenefits training. The page lists all the types of benefits that are available to you and which types you have elected, the plan you have elected, and the level of coverage or participation. It also lists the benefit types for which you have waived coverage. You can change these elections as part of the life event process. In this step, you will review each of the benefit types for which you have elected coverage. You will start with NonPERS Medical.
54.	Click the **NonPERS Medical** link. **Benefits Summary** | Type of Benefit	Plan Description	Coverage or Participation
---	---	---
NonPERS Medical	Contra Costa Health Plan A	Employee Only
Dental PPO	Delta Dental PPO w/CCHP Plan	Family
CVC Vision Voucher	CVC Vision Plan	Employee Only
Voluntary Vision Plan		Waived
Dental HMO		Waived
Basic Life	Basic Life 10000 ER	$10,000	
55.	The **NonPERS Medical** page displays. Currently you are enrolled in the Contra Costa Health Plan A, employee only. You will not change this election. Your new child will be covered under your husband's medical coverage through his work.
56.	Click the **eBenefits Summary** link. **Covered Dependents** No dependent/beneficiary enrollments were found. **Additional Information** eBenefits Summary
57.	Next you will review Dental PPO. Click the **Dental PPO** link. **Benefits Summary** | Type of Benefit	Plan Description	Coverage or Participation
---	---	---
NonPERS Medical	Contra Costa Health Plan A	Employee Only
Dental PPO	Delta Dental PPO w/CCHP Plan	Family
CVC Vision Voucher	CVC Vision Plan	Employee Only
Voluntary Vision Plan		Waived
Dental HMO		Waived
Basic Life	Basic Life 10000 ER	$10,000	

Step	Action
58.	The Dental PPO page displays. You are currently enrolled Delta Dental PPO, employee and two dependents. You will continue this enrollment and add your new child to this plan.
59.	Click the **eBenefits Summary** link. **Covered Dependents** 	Name	Relationship
Michelle Grey	Child
Susan Grey	Spouse
Tracy Grey	Child | Additional Information eBenefits Summary
60.	Next you will review your CVC Vision Voucher coverage. Click the **CVC Vision Voucher** link. **Benefits Summary** | Type of Benefit	Plan Description	Coverage or Participation
NonPERS Medical	Contra Costa Health Plan A	Employee Only
Dental PPO	Delta Dental PPO w/CCHP Plan	Family
CVC Vision Voucher	CVC Vision Plan	Employee Only
Voluntary Vision Plan		Waived
Dental HMO		Waived
Basic Life	Basic Life 10000 ER	$10,000	
61.	The **CVC Vision Voucher** displays. You are currently enrolled, employee only. You will not change this enrollment.
62.	Click the **eBenefits Summary** link. **Covered Dependents** No dependent/beneficiary enrollments were found. Additional Information eBenefits Summary
63.	Next you will review your Basic Life coverage. Click the **Basic Life** link. **Benefits Summary** | Type of Benefit	Plan Description	Coverage or Participation
NonPERS Medical	Contra Costa Health Plan A	Employee Only
Dental PPO	Delta Dental PPO w/CCHP Plan	Family
CVC Vision Voucher	CVC Vision Plan	Employee Only
Voluntary Vision Plan		Waived
Dental HMO		Waived
Basic Life	Basic Life 10000 ER	$10,000
Spouse Life and AD & D		Waived	

Step	Action
64.	The **Basic Life** page displays. You will not make any changes to your allocations for this benefit.
65.	Click the **eBenefits Summary** link. **Covered Beneficiaries** You are currently viewing past allocations, therefore, you are not eligible to make changes. **Dep/Ben Coverage Details** 	Name	Relationship to Employee	Primary Allocation	Secondary Allocation
------	--------------------------	--------------------	----------------------
Grey,Michelle	Child		100%
Grey,Susan	Spouse	100%		 eBenefits Summary
66.	Click the scrollbar to move to the bottom of the page.
67.	Click the **Next** button. Add To ▾ Notification NavBar ◀Previous Next▶ Cancel Continue Later
68.	Click the **Start My Enrollment** button. Benefit Enrollment Now the system is ready to prepare your benefit options, based upon the information that you've entered. Your information will be analyzed to see if there is any impact to your eligibility for benefits, and determine whether changes to your existing enrollments are allowed. Select the 'Start My Enrollment' push button to begin your benefit enrollment. Start My Enrollment
69.	The **Activity Guide** now indicates that you are on the **Benefits Enrollment** step. Review the text on the **Benefits Enrollment** page. Then click the **Select** button in the **Open Benefits Events** section.
70.	Click the **Select** button. **Open Benefit Events** | Event Description		Event Date	Event Status	Job Title	
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Birth or Adoption	ⓘ	08/28/2017	Open	Medical Records Technician	Select	

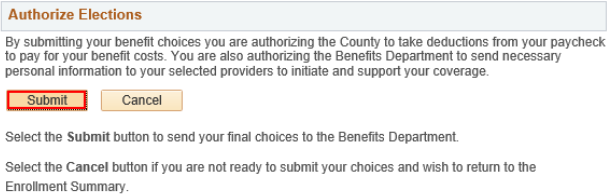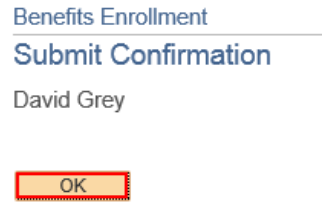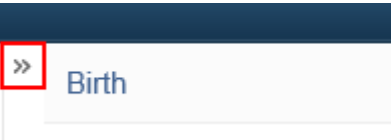| Step	Action
71.	Click the **Minimize eBenefits** button to collapse the Activity Guide. ORACLE All ▼ Search eBenefits ⚙ « Birth Life Events ↻ ⚙▼
72.	The **Enrollment Summary** section lists the types of benefits available to you and your current enrollments. You will scroll through these options before beginning to make changes to enrollment to accommodate your new child.
73.	Click the scrollbar to move down the page..
74.	Click the scrollbar to move down the page.
75.	The **Election Summary Section** displays your costs and the employer contribution for your current elections. If you do not want to change any of your elections, click the **I Have No Changes** button. For this example, you do want to make changes to your dental coverage. Scroll to the top of the page.
76.	Click the scrollbar top move up the page.
77.	Click the scrollbar to move up the page.
78.	You will add your new child to your dental coverage. You will not change your medical coverage.
79.	Click the **Edit** button. Dental PPO Before Tax After Tax Employer Cost Edit Current: Delta Dental PPO w/CCHP Plan:Emp+2 Deps New: Delta Dental PPO w/CCHP Plan:Emp+2 Deps 9.00 93.00
80.	The **Dental PPO** page displays. Your current coverage is Delta Dental PPO w/CCHP Plan, employee only. You will add your new child to this plan as a covered dependent.
81.	You can use the **Cost Comparison for All Plans** link to view cost comparisons. You will not use this link.

Step	Action
82.	Click the **Cost Comparison for all Plans** link. **Select an Option** Here Are Your Available Options With Your Costs: (Your cost = Full benefit cost - County Subsidy) Cost Comparison for all Plans
83.	Click the scrollbar to move down the **Coverage Details** section.
84.	Click the scrollbar to down the page.
85.	Click the **Return** button. | Delta Dental PPO Only	Employee + State Registered DP	4.19	Before and After Tax
Delta Dental PPO Only	EE+State Reg DP+Child/ren	4.19	Before and After Tax
Delta Dental PPO Only	EE+State Reg NA+Child/ren	4.19	Before-Tax	 Return
86.	The Delta Dental PPO w/CCHP Plan is selected. This is the plan in which your are currently enrolled. You will scroll to the bottom of the page and select your new child for coverage under this plan.
87.	Click the scrollbar to move down the page.
88.	The **Enroll Your Dependents** selection displays. Use this section to add your new child to your Dental PPO coverage.
89.	Click the **Enroll** option for your new child. **Dependent Beneficiary** 	Enroll	Name	Relationship
---	---	---
☑	Michelle Grey	Child
☑	Susan Grey	Spouse
☑	Tracy Grey	Child
☐	Megan Grey	Child	
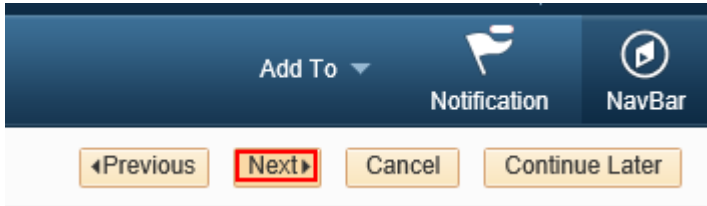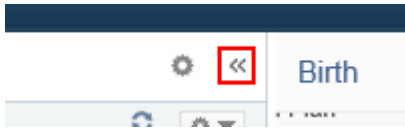
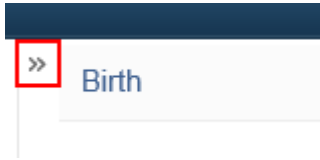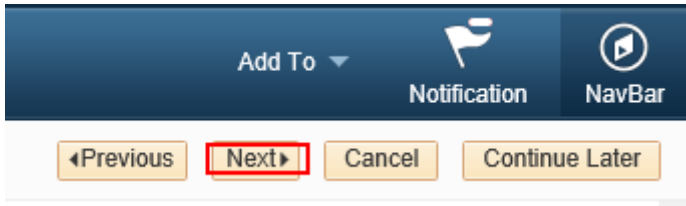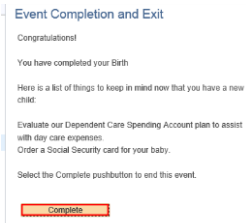| Step	Action
90.	Click the **Update and Continue** button. ☑ Susan Grey — Spouse ☑ Tracy Grey — Child ☑ Megan Grey — Child Add/Review Dependents Update and Continue Discard Changes
91.	The **Dental PPO** page now displays -- **Your Choice** -- **You Estimated Per-Pay-Period Cost** -- **Your Covered Dependents** The **Notes** section indicates when your new coverage will take effect and when deductions for this coverage will start.
92.	Click the **Update Elections** button. Megan Grey — Child **Notes** Once submitted, this choice will take effect on 10/01/2017. Deductions for this choice will start with the pay period beginning 09/01/2017. Update Elections Discard Changes
93.	You are now ready to save your benefit elections. You will scroll to the bottom of the **Benefits Enrollment** page.
94.	Click the scrollbar to move down the page.
95.	Click the scrollbar to move down the page.
96.	The **Election Summary** section displays information about your total before and after tax costs for your medical and dental elections and the total of the County's contribution (**Employer**)
97.	Click the **Save and Continue** button. the amount the County is contributing to subsidize the cost of your benefits.) **Election Summary** 	Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax	Employer	 	Costs	165.76	165.76	0.00	655.06	 	Your Costs	165.76	165.76	0.00		 These costs do not include certain choices that are based on variable earnings. Save and Continue
98.	The **Submit Benefits Choices** page displays. Read the text on this page. This text reminds you that you can still go back and review/revise your elections (up until your enrollment deadline).

Step	Action
99.	Use the **Cancel** button to return to the Benefit Summary page. You can then revise your elections. The **Submit** button sends your choices to Benefits. Do not click this button until you are certain of your choices. Once your click submit, you may not be able to make any changes to your elections until the next open enrollment period or until your experience a qualifying life event. For this example, you are ready to submit your elections.
100.	Click the **Submit** button. **Authorize Elections** By submitting your benefit choices you are authorizing the County to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage. [Submit] [Cancel] Select the **Submit** button to send your final choices to the Benefits Department. Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.
101.	Click the **OK** button. Benefits Enrollment **Submit Confirmation** David Grey [OK]
102.	Click the **Expand** button to display the **Activity Guide**. » Birth
103.	The **Activity Guide** indicates that you have completed the **Benefit Enrollment** step.
104.	Notice the **Event Status** field in the **Open Benefits Events** section now displays Submitted. If you click the **Select** button, the system will navigate back to the **Benefits Summary** step. You will then have to move through the steps to review and/or modify your elections. Any changes that you made to this point will be discarded.

Step	Action
105.	Click the **Next** button.
106.	The **Benefits Election Review** page displays. Use this page to review your elections. You can also use the **Print** button to display a pdf report of your benefits elections. For this example, you will review your elections on line. You will not use the **Print** button.
107.	Click the scrollbar to move down the page.
108.	Click the **Minimize eBenefits** button. The Activity Guide will hide and you will be able to see your benefits enrollment information without having to scroll to the right.
109.	Click the scrollbar to move to the top of the page.
110.	Click the **Expand** button to display the Activity Guide.
111.	Note: at this point you can still cancel this event or select to continue the event at a later time. For this example you are ready to go on to the next step, **Event Completion and Exit.**
112.	Click the **Next** button.
113.	The **Event Completion and Exit** page displays. For this topic, you are ready to complete this event.

Step	Action
114.	Click the **Complete** button. Event Completion and Exit Congratulations! You have completed your Birth Here is a list of things to keep in mind now that you have a new child: Evaluate our Dependent Care Spending Account plan to assist with day care expenses. Order a Social Security card for your baby. Select the Complete pushbutton to end this event. [Complete]
115.	Click the **Home** link. Home | Sign out d To ▼ Notification NavBar
116.	**End of Procedure.**