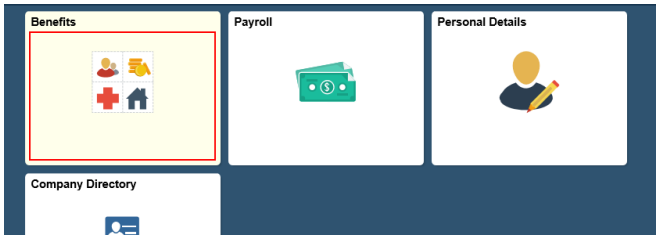
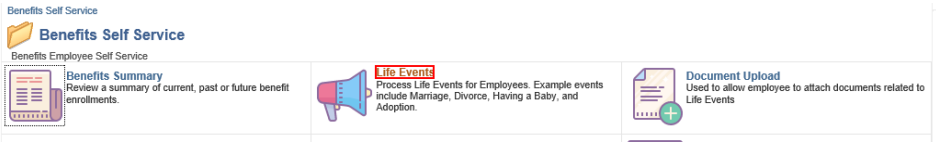
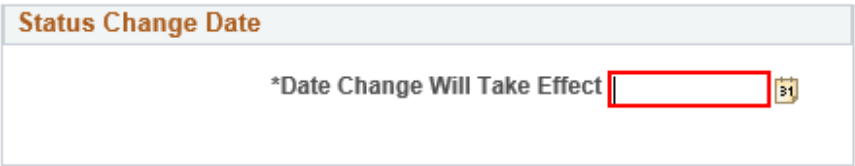
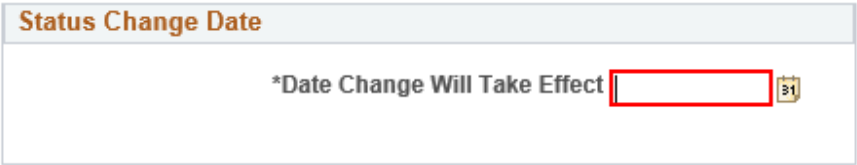
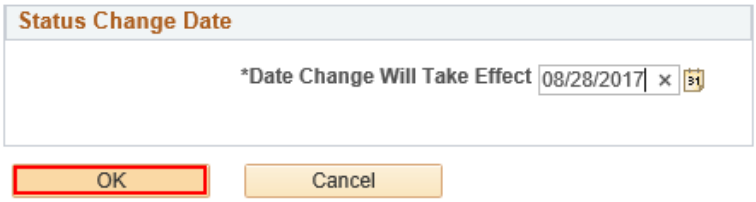
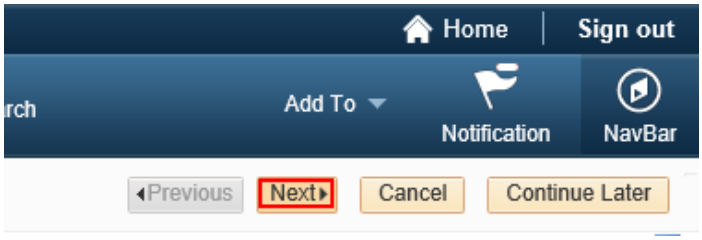
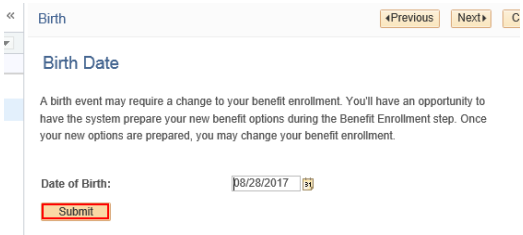
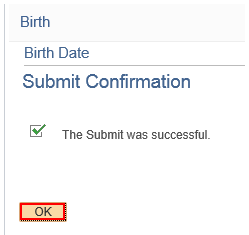
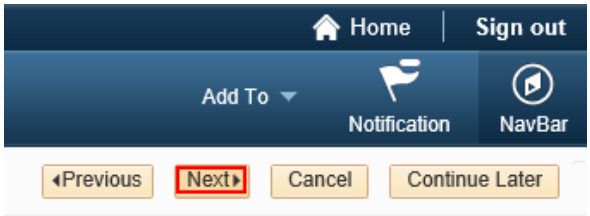
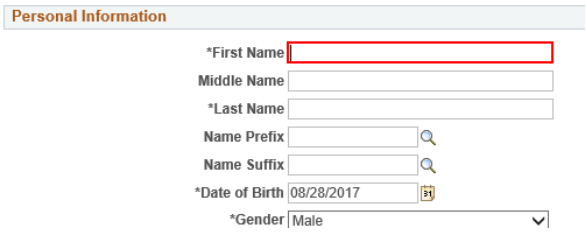
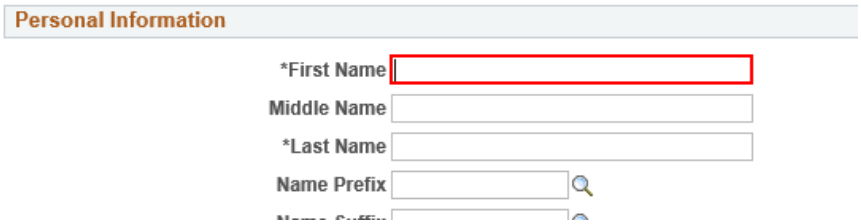
Birth

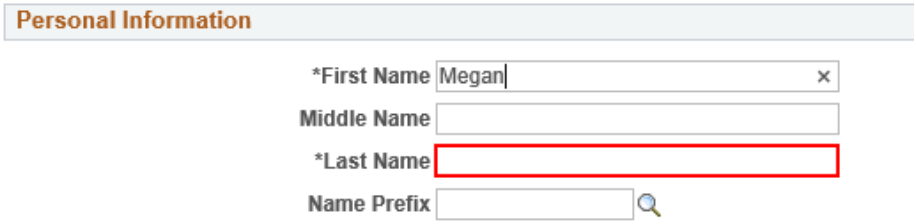
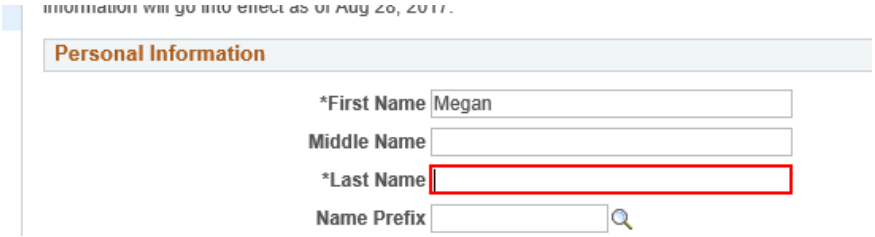
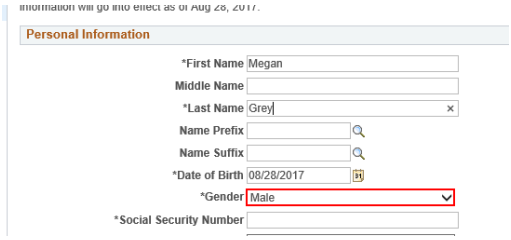
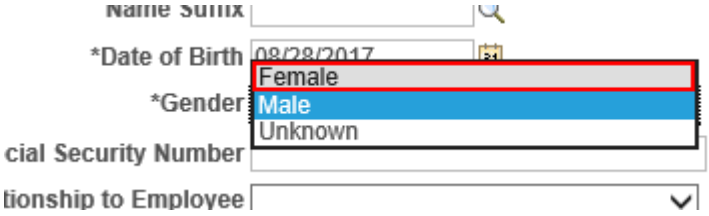
Step	Action
1.	Click the **Benefits** tile. 
2.	The **Benefits Self Service** page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid. This page contains the links that you use to review and manage your benefits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

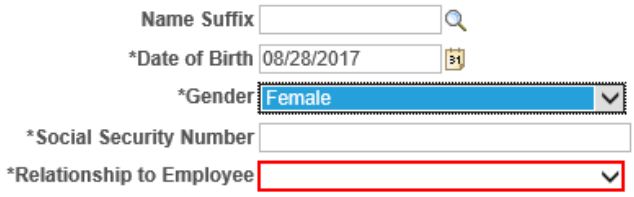
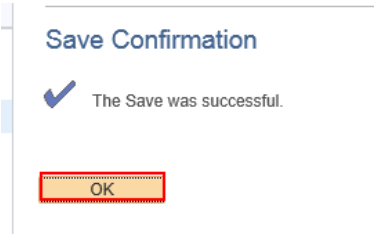
Step	Action
5.	You can only process one life event at a time. The life event pages contain a **Cancel** button and a **Continue Later** button. **Cancel** cancels the life event and discards any changes you made. **Continue Later** saves the changes you made and allows you to continue processing the 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.
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. 
9.	Enter the desired information into the **Date Change Will Take Effect** field. Enter a valid value e.g. "**08/28/2017**". 

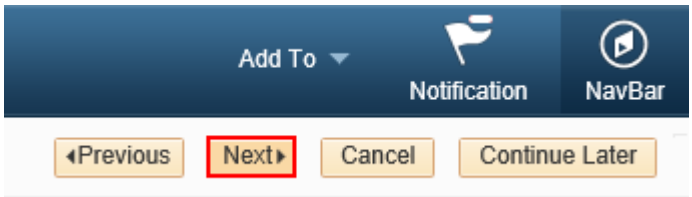
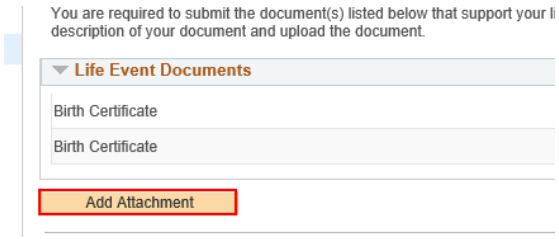
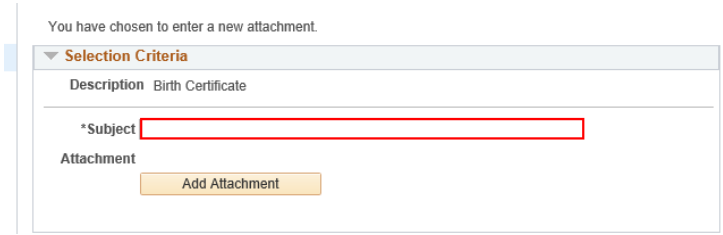
Step	Action
10.	Click the **OK** button. 
11.	The **Welcome to the Birth Event** page displays. Review the information in the welcome message. Then begin the process.
12.	This page, as will all life event pages, displays the activity guide. The panel on the left lists all the steps necessary to complete 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.

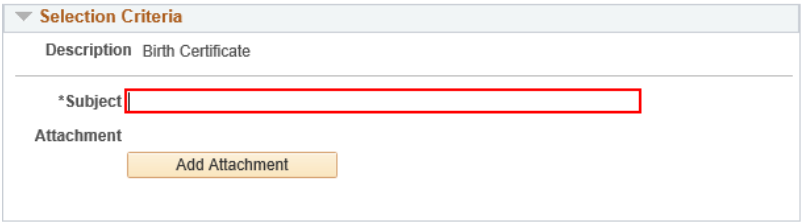
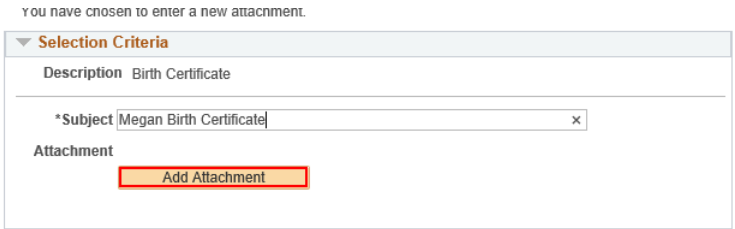
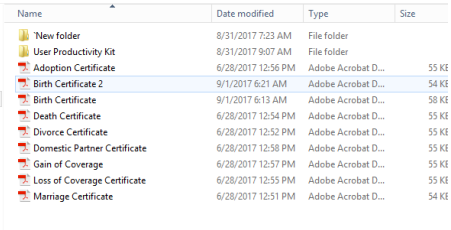
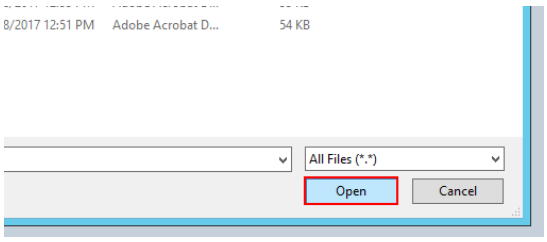
Step	Action
16.	You are now ready to submit your information. Click the **Submit** button. 
17.	Click the **OK** button. 
18.	The **Birth Date** page displays in view only mode. If you need to change the date, use the **Previous** button to return to the previous step. You will be able to edit this date. 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. 

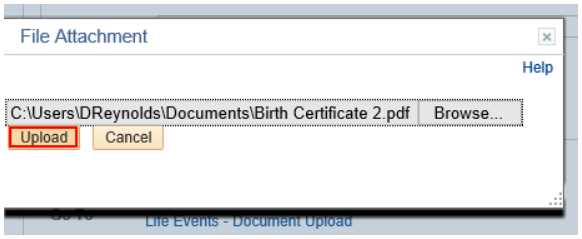
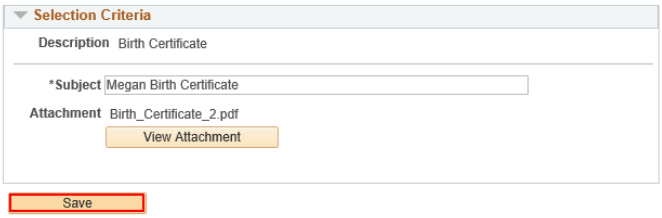
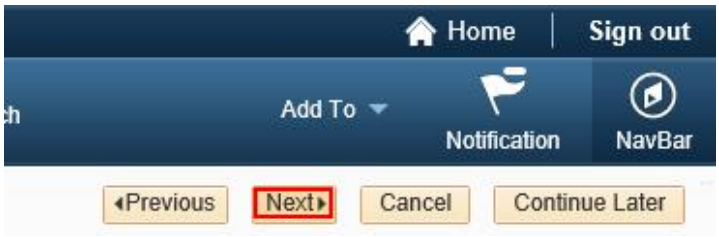
Step	Action
20.	The **Add/Review Dependent/Beneficiary** page displays. The activity guide indicates that you are on the next step in the process--**Update Dependent and Beneficiary**. In this step, you will add your new child, Megan, as a dependent/beneficiary. Doing so will make her eligible for coverage 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

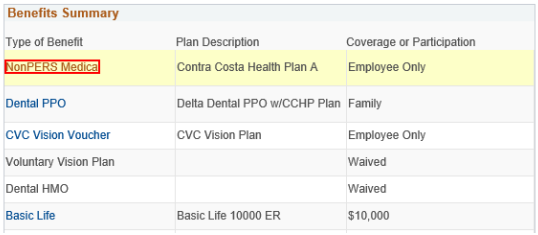
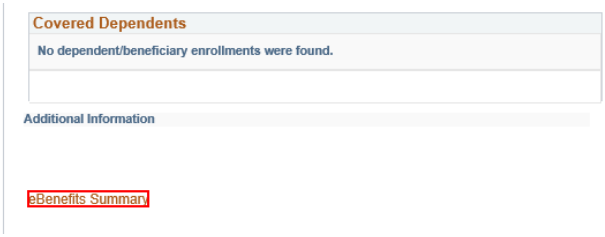
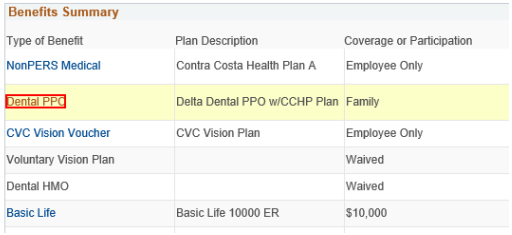
Step	Action
24.	Click in the **Last Name** field. 
25.	Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Grey**". 
26.	Notice, the **Date of Birth** field automatically populates based on information you provided earlier.
27.	Click the **Gender** list. 
28.	Click 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.

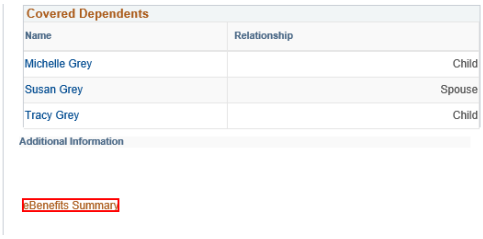
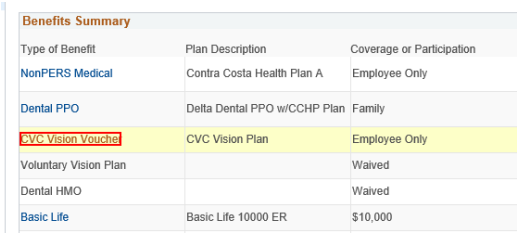
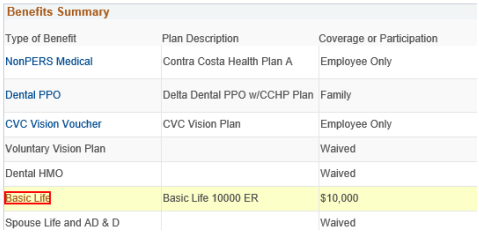
Step	Action
30.	Click the **Relationship to Employee** list. 
31.	Click the **Child** list item.
32.	Click the scrollbar to move to the bottom of the page.
33.	Generally, you will leave the **Same Address as Employee** and **Same Phone as Employee** check boxes selected. If your address has changed, 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.
35.	Click the **OK** button. 

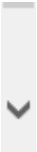
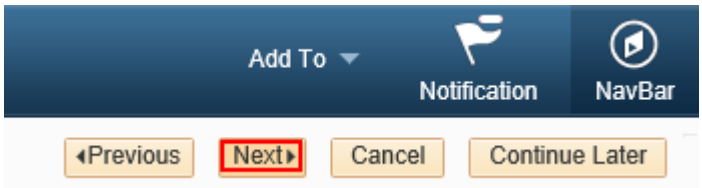
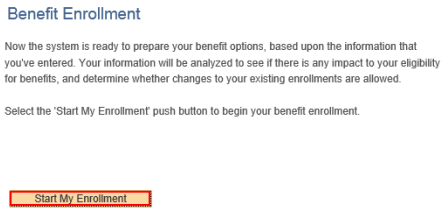
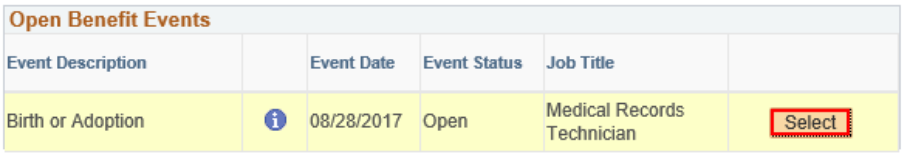
Step	Action
36.	Notice, your new child now appears in the **Dependent and Beneficiary Information** section. The **Activity Guide** indicates that you have completed the **Update Dependent and Beneficiary** step. You are now ready to go on to the next step, **Document Upload**.
37.	Click the **Next** button. 
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. 
40.	You must enter a description in the **Subject** field. This is a required field.
41.	Click in the **Subject** field. 

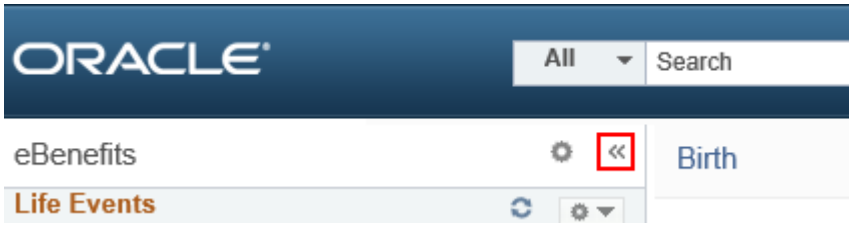
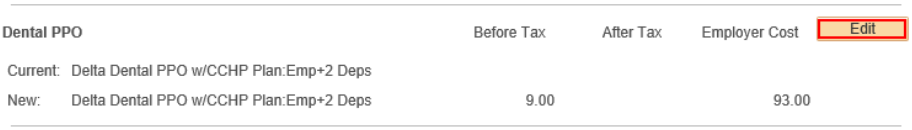
Step	Action
42.	Enter the desired information into the **Subject** field. Enter a valid value e.g. "**Megan Birth Certificate**". 
43.	Click the **Add Attachment** button. 
44.	The **File Attachment** window displays. Use this window to locate and upload the marriage certificate.
45.	Click in the **Help** field.
46.	Click the **Birth Certificate 2** list item. 
47.	Click the **Open** button. 

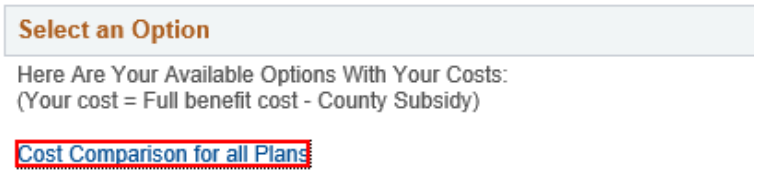
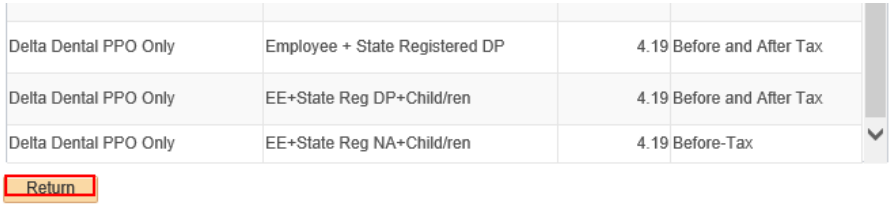
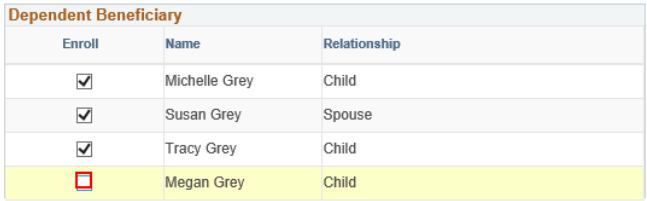
Step	Action
48.	Click the **Upload** button. 
49.	The **Document Definition - New Attachment** page displays. the **Selection Criteria** section displays the subject you entered previously and the name of the file you uploaded, in this case Birth_Certificate_2.pdf. You can use the **View Attachment** 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. 
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. 

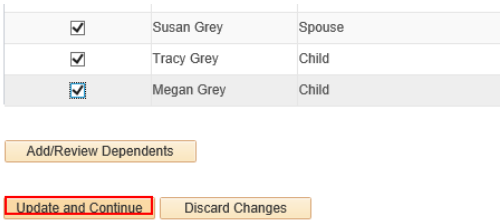
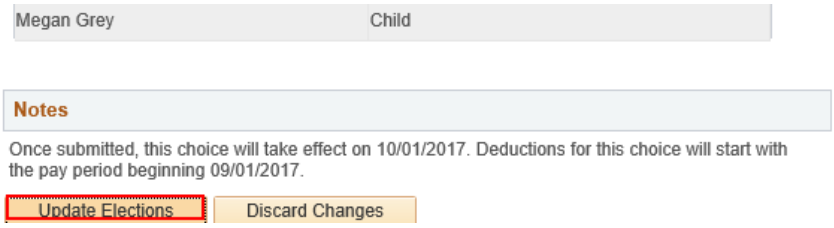
Step	Action
53.	The **Benefits Summary** page displays. This is the same page that you can access from the **Benefits Summary** link on the **Benefits Self Service** home page. Use if this page is covered in other portions of eBenefits training. The page lists all the types of benefits that are available 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

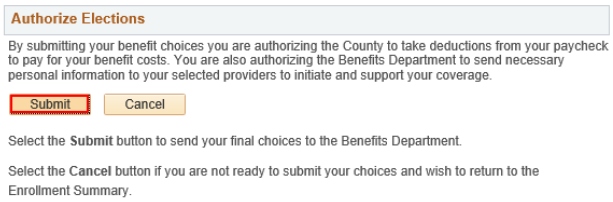
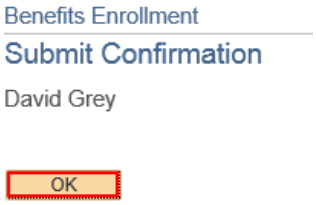
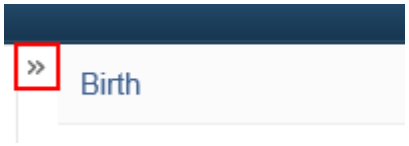
Step	Action
58.	The Dental PPO page displays. You are currently enrolled Delta Dental PPO, employee and two dependents. You will continue this enrollment and add your new child to this plan.
59.	Click the **eBenefits Summary** link.  Covered Dependents Name | Relationship Michelle Grey | Child Susan 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

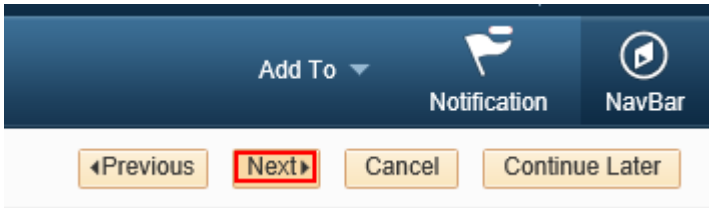
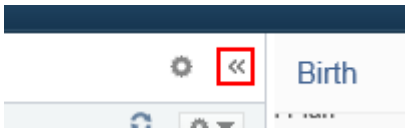
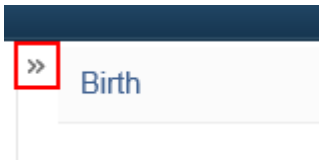
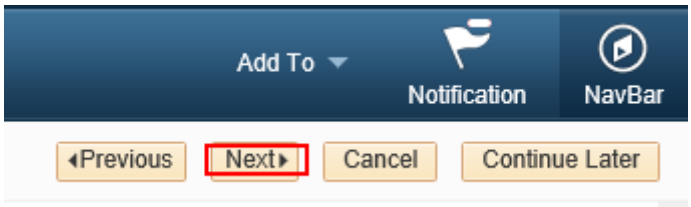
Step	Action
64.	The **Basic Life** page displays. You will not make any changes to your allocations for this benefit.
65.	Click the **eBenefits Summary** link.
66.	Click the scrollbar to move to the bottom of the page. 
67.	Click the **Next** button. 
68.	Click the **Start My Enrollment** button. 
69.	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. 

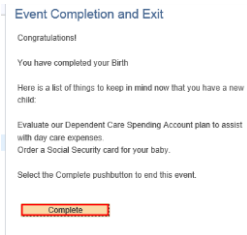
Step	Action
71.	Click the **Minimize eBenefits** button to collapse the Activity Guide. 
72.	The **Enrollment Summary** section lists the types of benefits available to you and your current enrollments. You will scroll through these options before beginning to make changes to enrollment to accommodate 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. 
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. 
83.	Click the scrollbar to move down the **Coverage Details** section.
84.	Click the scrollbar to down the page.
85.	Click the **Return** button. 
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. 

Step	Action
90.	Click the **Update and Continue** button. 
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. 
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.
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. 
101.	Click the **OK** button. 
102.	Click the **Expand** button to display the **Activity Guide**. 
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. 
115.	Click the **Home** link.
116.	**End of Procedure.**