Completing a Deferred Compensation Contribution Change Life Event

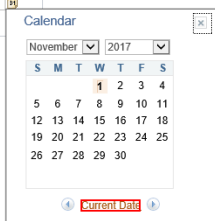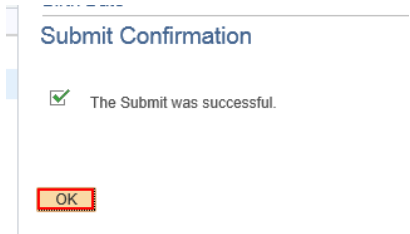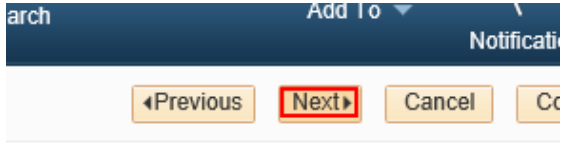| Step	Action
1.	Click the **Benefits** button.
2.	The **Benefits Self Service** page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid. This page contains the links that you use to review and manage your benefits 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 plan 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. You can only process one life event at a time. The system provides a guided process that walks you through the steps necessary to complete a life event For this example you will select **Deferred Compensation Contribution Change**.

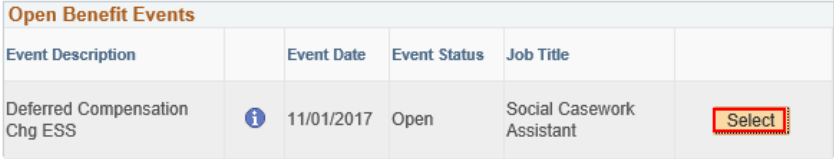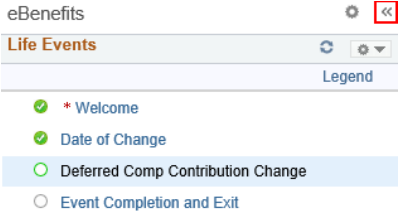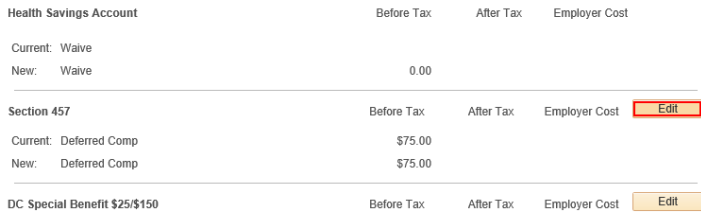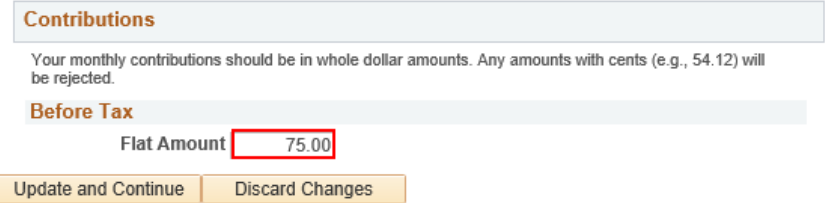| Step	Action
5.	You can only process one life event at a time. The life event pages contain a **Cancel** button and a **Continue Later** button. **Cancel** cancels the life event and discards any changes you made. **Continue Later** saves the changes you made and allows to continue processing the life 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 Even**t button. You will not be able to start another until you either complete the event in progress or cancel it.
6.	Click the **Deferred Compensation Contribution Change** 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
7.	The **Change Status Date** page displays. Use the **Date Change Will Take Effect** field to enter the date on which you want the change in contribution to become effective. For this example you will select the current date in the **Date Change Will Take Effect** field. Note: this event must be completed by the end of the current month in order for the change to be processed to be reflected in the next 10th of month pay.
8.	Click the **Calendar Date Submitted** button. ate *Date Change Will Take Effect [ ] 🗓
9.	Click the **Current Date** link. Calendar November ⌄ 2017 ⌄ S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 ◀ Current Date ▶

Step	Action
10.	Click the **OK** button. Please note that the change must be completed by the end of the current month to be processed for the next 10th of the month pay. **Status Change Date** *Date Change Will Take Effect 11/01/2017 × 🗓 OK Cancel
11.	The **Deferred Compensation Change** page displays. Review the information 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.
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.	Click the **Next** button. Notification ◄Previous Next► Cancel Co Help | Personal
15.	The **Deferred Compensation Change** page displays. The **Date of Status Change** field displays the date you previously entered. This should reflect the date you want to the change to become effective. You can edit the value in this field, if necessary. For this example, you will not edit this value.
16.	Click the **Submit** button. If correct, please click on the **Submit** button. Date of Status Change 11/01/2017 🗓 Submit

Step	Action
17.	Click the **OK** button. Submit Confirmation ☑ The Submit was successful. OK
18.	The **Deferred Compensation Change** 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. You will not make any changes to this date. Note the **Activity Guide** indicates that the **Date of Change** step is complete. You are now ready to move to the next step, **Deferred Comp Contribution Change.**
19.	Click the **Next** button. arch Add To Notificati ◄Previous Next► Cancel Cc
20.	The **Benefit Enrollment** page displays. Click the **Start My Enrollment** button to have the system prepare your options.
21.	Click the **Start My Enrollment** button. Start My Enrollment
22.	The **Activity Guide** now indicates that you are on the **Deferred Comp Contribution Change** step. Review the text on the **Benefits Enrollment** page. Then click the **Select** button in the **Open Benefits Events** section.

Date Created: 11/13/2017 2:23:00 PM

Step	Action
23.	Click the **Select** button. **Open Benefit Events** Event Description / Event Date / Event Status / Job Title Deferred Compensation Chg ESS 11/01/2017 Open Social Casework Assistant [Select]
24.	Click the **Minimize eBenefits** button. eBenefits ✿ « **Life Events** ↻ ✿▾ Legend ✅ * Welcome ✅ Date of Change ◯ Deferred Comp Contribution Change ◯ Event Completion and Exit
25.	The **Enrollment Summary** sections displays the type of benefits for which you can make changes in your current enrollments--those that have a **Edit** button. You can change your enrollments for **Section 457** and **DC Special Benefits $25/$150**. For this example you will edit your contribution to **Section 457.** You will increase your contribution from $75 to $85.
26.	Click the **Edit** button. **Health Savings Account** Before Tax After Tax Employer Cost Current: Waive New: Waive 0.00 **Section 457** Before Tax After Tax Employer Cost [Edit] Current: Deferred Comp $75.00 New: Deferred Comp $75.00 **DC Special Benefit $25/$150** Before Tax After Tax Employer Cost [Edit]
27.	Click in the **Flat Amount** field. **Contributions** Your monthly contributions should be in whole dollar amounts. Any amounts with cents (e.g., 54.12) will be rejected. **Before Tax** Flat Amount [75.00] [Update and Continue] [Discard Changes]

Step	Action
28.	Enter the desired information into the **Flat Amount** field. Enter a valid value e.g. "**85**". **Contributions** Your monthly contributions should be in whole dollar amounts. Any amounts with cents (e.g., 54.12) will be rejected. **Before Tax** Flat Amount 75.00
29.	Click the **Update and Continue** button. **Contributions** Your monthly contributions should be in whole dollar amounts. Any amounts with cents (e.g., 54.12) will be rejected. **Before Tax** Flat Amount 85 Update and Continue Discard Changes
30.	The **Your Choice** section displays your new contribution. The **Notes** section indicates when the change will take effective and when deductions reflecting your choice will be taken from your paycheck. You are ready now to update your elections.
31.	Click the **Update Elections** button. **Your Choice** You have chosen $85 before-tax. **Notes** Once submitted, this choice will take effect on 11/01/2017. Deductions for this choice will start with the pay period beginning 10/01/2017. Update Elections Discard Changes
32.	The **Section 457** section now displays the new contribution you just specified. You are now ready to save your changes.
33.	Click the scrollbar.
34.	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
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Costs	530.64	530.64	0.00	1,623.57
Your Costs	530.64	530.64	0.00		 These costs do not include certain choices that are based on variable earnings. Save and Continue

Step	Action
35.	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).
36.	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.
37.	Click the **Submit** button. next Open Enrollment period or if you have a qualifying event such as a family status change. **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
38.	Click the **OK** button. Benefits Enrollment Submit Confirmation Don Smith OK
39.	Click the **Next** button. ◄Previous Next► Cancel Continue Later
40.	The **Event Completion and Exit** page displays. For this topic, you are ready to complete this event.
41.	Click the **Complete** button. Event Completion and Exit To finalize your Change DC-457 Contribution event, please click the Complete button below. Complete

Step	Action
42.	Click the **Home** link.
43.	**End of Procedure.**