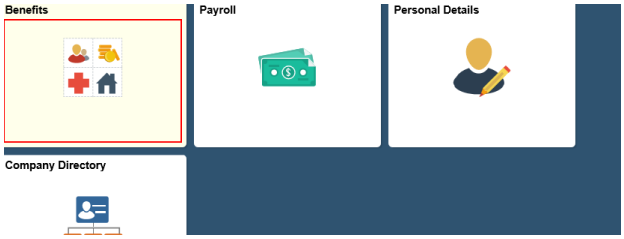
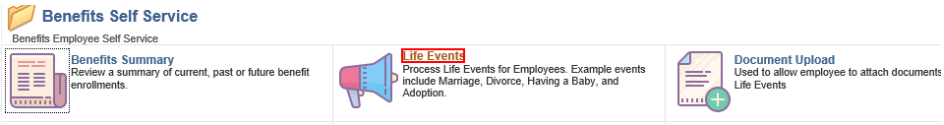
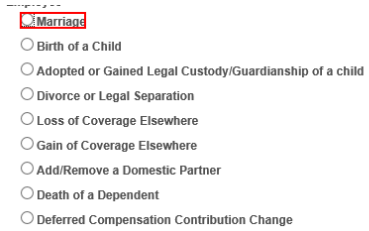
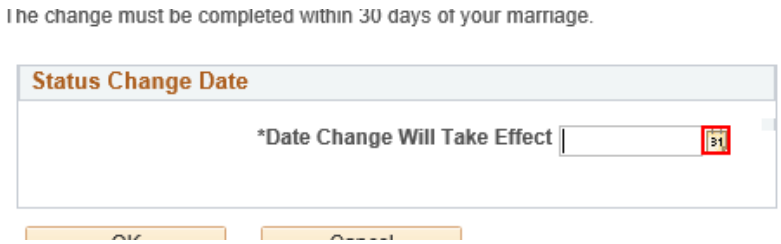
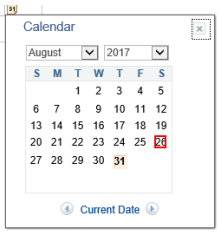
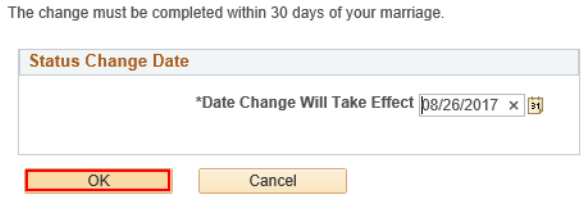
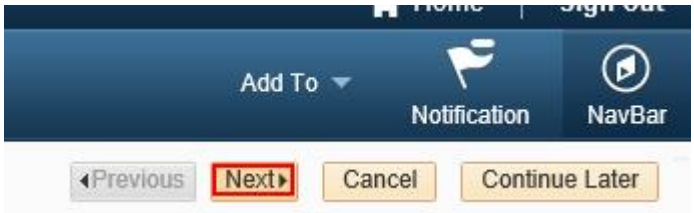
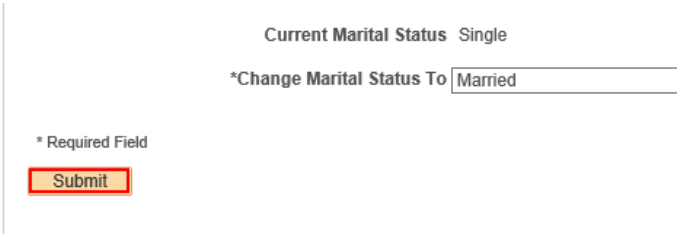
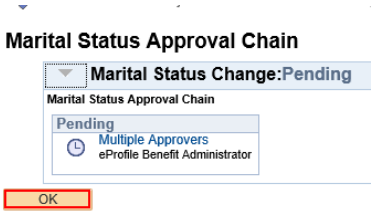
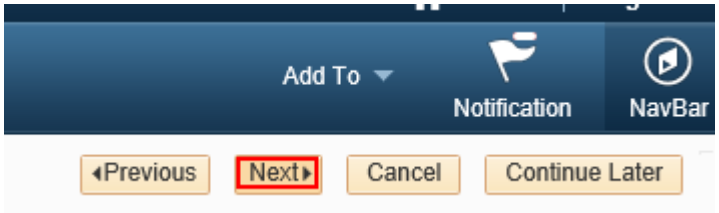
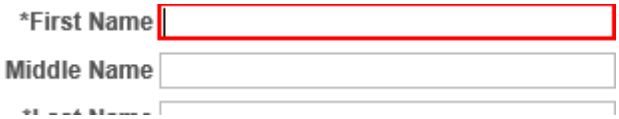
Completing a Marriage Life Event

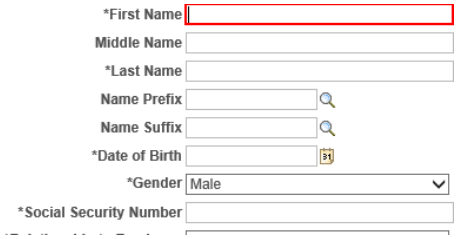
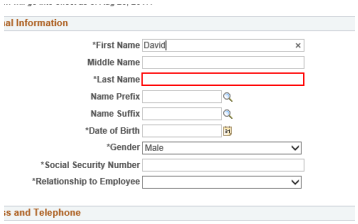
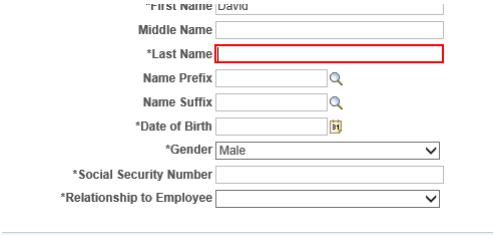
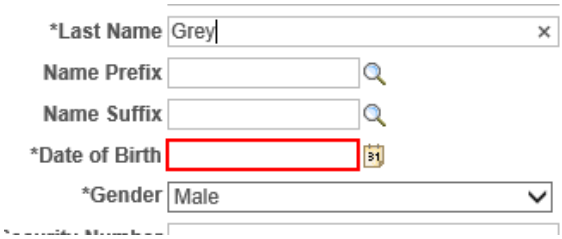
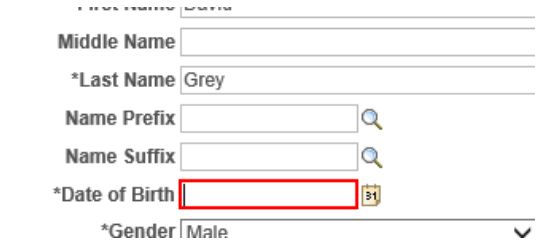
Step	Action
1.	Click the **Benefits** tile. 
2.	The **Benefits Self Service** page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid. This page contains the links that you use to review and manage your benefits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

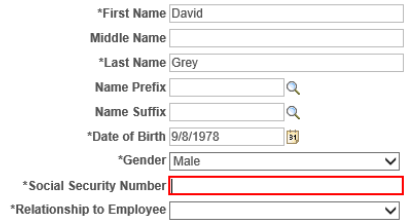
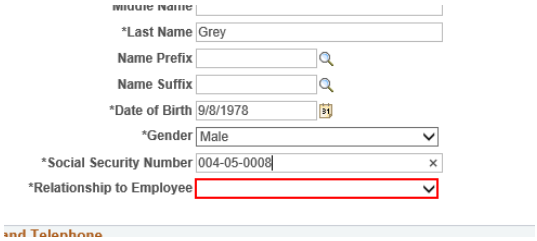
Step	Action
5.	You can only process one life event at a time. The life event pages contain a **Cancel** button and a **Continue Later** button. **Cancel** cancels the life event and discards any changes you made. **Continue Later** saves the changes you made and allows you to continue processing the 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 **Marriage** option. 
7.	The **Change Status Date** displays. Use the **Date Change Will Take Effect** to enter your marriage date. You can also use the calendar button to select the date. For this example you will use the calendar button to select 8/26/2017. Note: you must complete the life event within 30 days of the date of your marriage.
8.	Click the **Calendar Date Submitted** button. 
9.	Click the **26** link. 

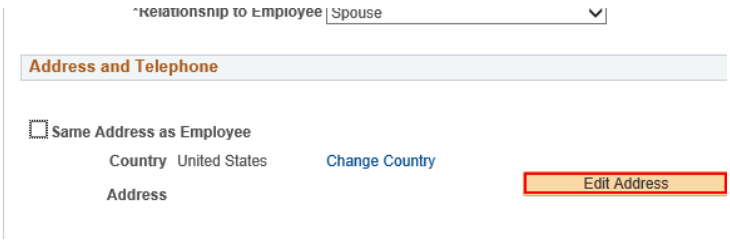
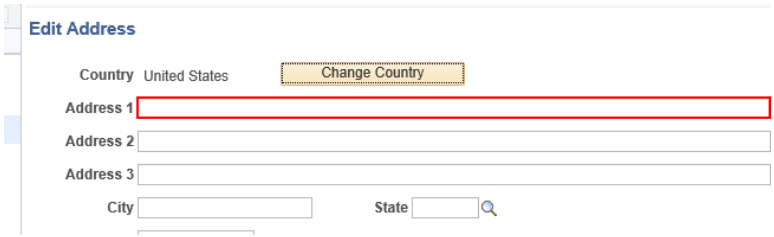
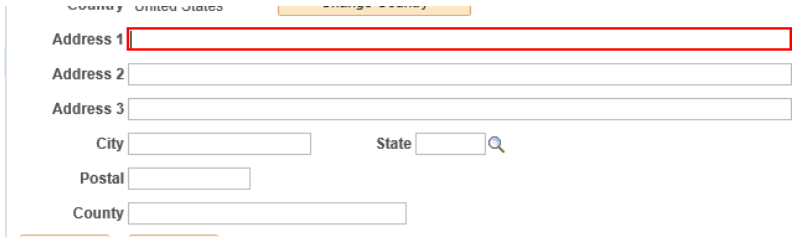
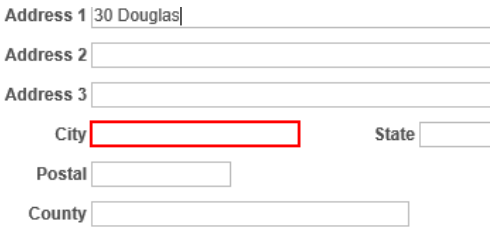
Step	Action
10.	Click the **OK** button. 
11.	The **Welcome to the Marriage Event** page displays. Review the information the welcome message. Then begin the process. Note the Activity Guide indicates that you have completed the **Welcome** step.
12.	This page, as will all life event pages, displays 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. 

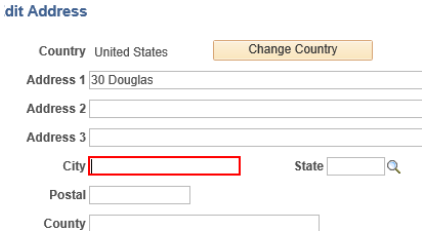
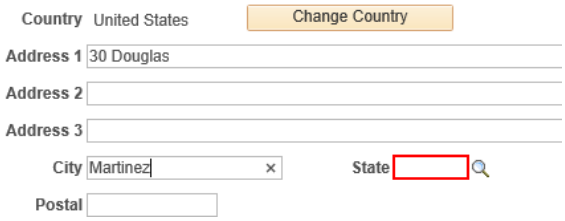
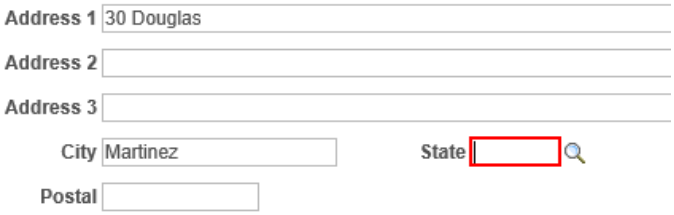
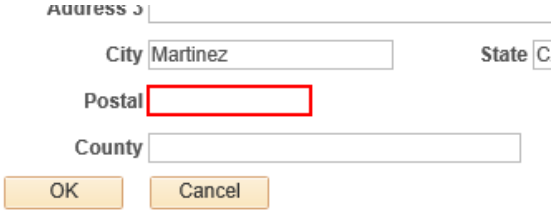
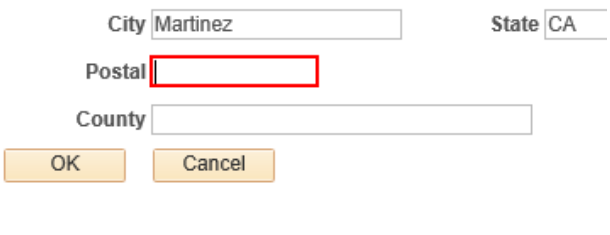
Step	Action
15.	The **Marital Status Change** page displays. The **Date Change Will Take Effect** displays the date you previously entered. You can edit this date, if necessary. This date should reflect your marriage date. The **Current Marital Status** field defaults to your current status and displays as view only. You cannot edit this field. The **Change Marital Status To** field defaults to Married. You should accept this default value.
16.	You are now ready to submit your request. Click the **Submit** button. 
17.	A **Submit Confirmation** page displays. This page contains an approval chain. Your request to change your marital status in the system is pending approval by multiple approvers. There is only one level of approval and only one of the multiple approvers must approve this change.
18.	Click the **OK** button. 
19.	The **Marital Status Change** page indicates that you have submitted a request to change your marital status in the system, for the purposes of benefits, from single to married. Notice the **Marital Status** step in the activity guide indicates that you have completed this step.

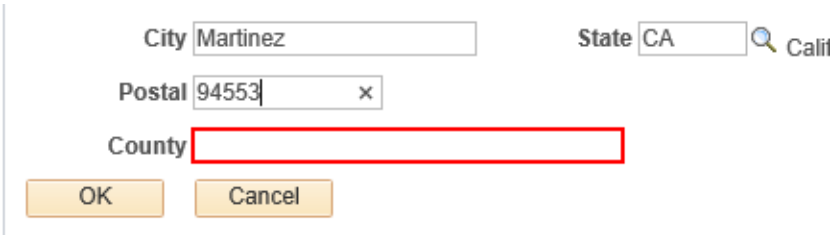
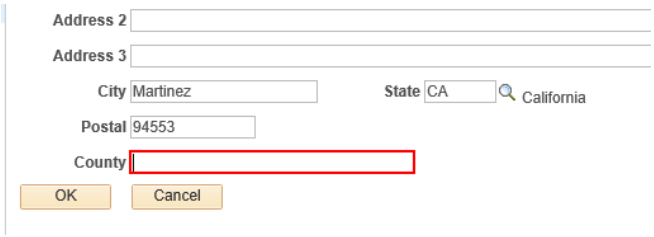
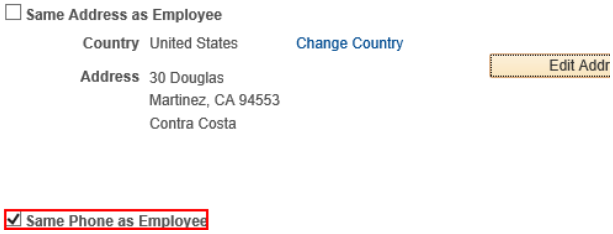
Step	Action
20.	You are now ready to go on to the next step. Click the **Next** button. 
21.	The **Add/Review Dependent/Beneficiary** page displays. The activity guide indicates that you are on the next step in the process--**Update Dependent and Beneficiary**. In this step, you will add your husband as a dependent/beneficiary. Doing so will make him 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/beneficiary. You can also edit this information outside of al 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.
22.	Use the **Add a dependent or beneficiary** button to add your husband as a dependent/beneficiary. Click the **Add a dependent or beneficiary** button. 
23.	Click in the **First Name** field. 

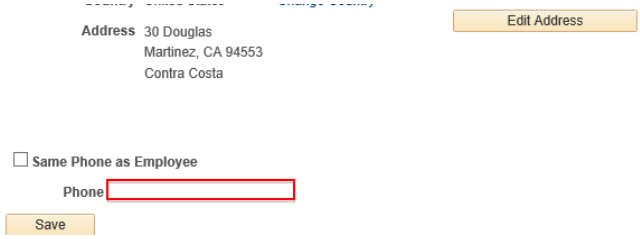
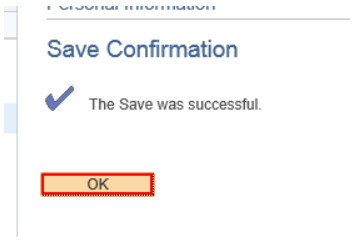
Step	Action
24.	Enter the desired information into the **First Name** field. Enter a valid value e.g. "**David**". 
25.	Click in the **Last Name** field. 
26.	Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Grey**". 
27.	Click in the **Date of Birth** field. 
28.	Enter the desired information into the **Date of Birth** field. Enter a valid value e.g. "**9/8/1978**". 

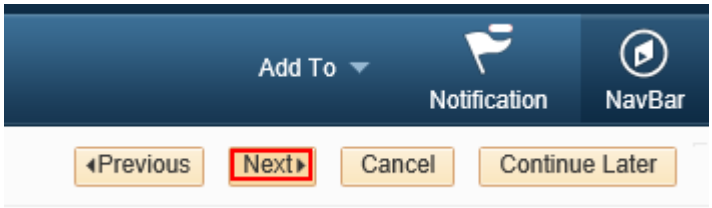
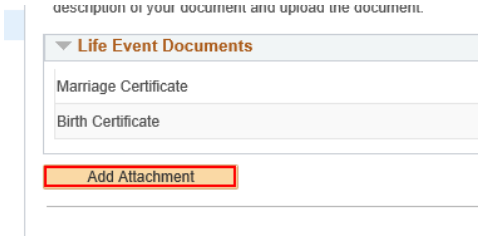
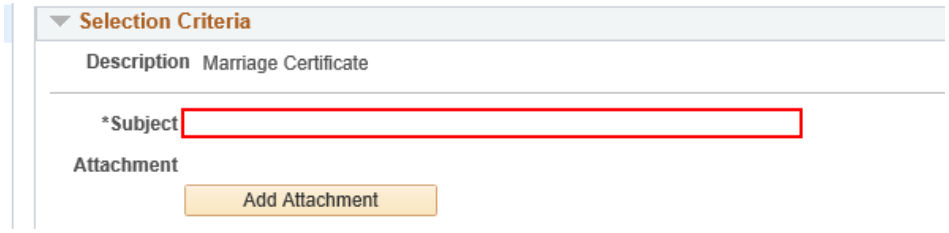
Step	Action
29.	Click in the **Social Security Number** field. 
30.	Enter the desired information into the **Social Security Number** field. Enter a valid value e.g. "**004-05-0008**". 
31.	Click the **Relationship to Employee** list. 
32.	Click the **Spouse** list item. 
33.	Your husband has a different address from yours that is stored in the system. You will add his address here. You will have to change your address in information in the system using eProfile. Changing address information is covered in eProfile training. To add his address information, begin by deselecting the **Same Address as Employee** option.

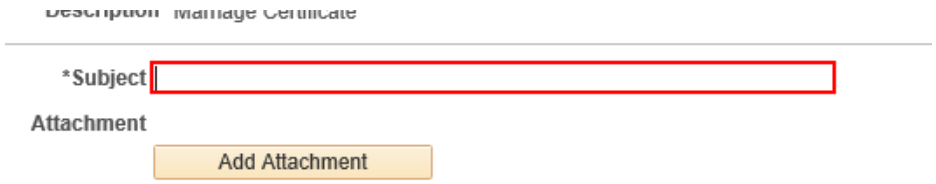
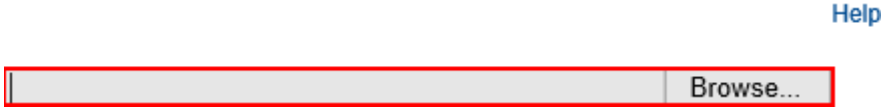
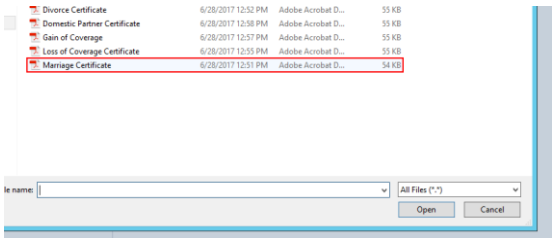
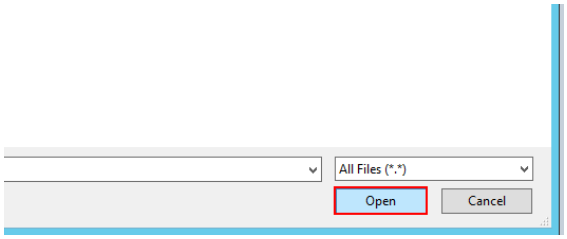
Step	Action
34.	Click the **Same Address as Employee** option. 
35.	Click the **Edit Address** button. 
36.	Click in the **Address 1** field. 
37.	Enter the desired information into the **Address 1** field. Enter a valid value e.g. "**30 Douglas**". 
38.	Click in the **City** field. 

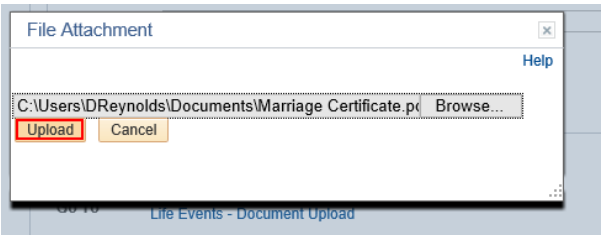
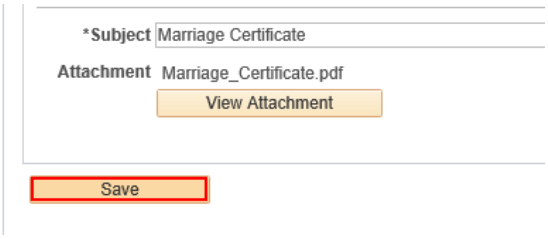
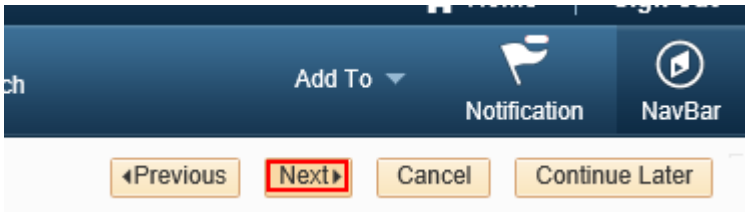
Step	Action
39.	Enter the desired information into the **City** field. Enter a valid value e.g. "**Martinez**". 
40.	Click in the **State** field. 
41.	Enter the desired information into the **State** field. Enter a valid value e.g. "**CA**". 
42.	Click in the **Postal** field. 
43.	Enter the desired information into the **Postal** field. Enter a valid value e.g. "**94553**". 

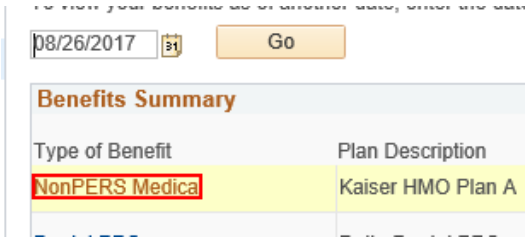
Step	Action
44.	Click in the **County** field. 
45.	Enter the desired information into the **County** field. Enter a valid value e.g. "**Contra Costa**". 
46.	Click the **OK** button. 
47.	Next you will enter your husband's phone information. It is different from yours as stored in the system. If you need to change your phone information, you will have to do so using eProfile. Changing phone information is covered in eProfile training.
48.	Click the **Same Phone as Employee** option. 
49.	Click the scrollbar.

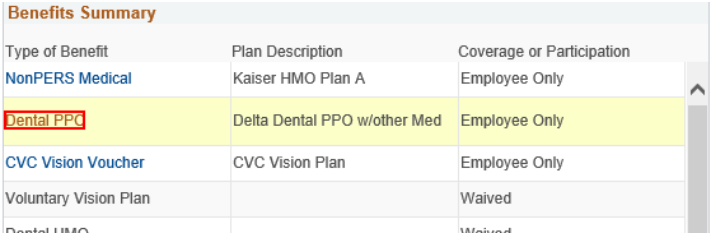
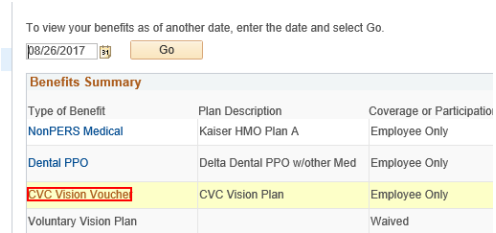
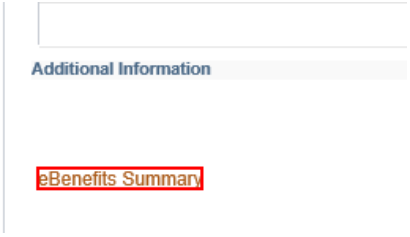
Step	Action
50.	Click in the **Phone** field. 
51.	Enter the desired information into the **Phone** field. Enter a valid value e.g. "**925/555-8888**". 
52.	Click the **Save** button. 
53.	Click the **OK** button. 
54.	Note: your husband now displays in the **Dependent and Beneficiary Information** section. Notice the activity guide now indicates that the **Update Dependent and Beneficiary** step is now complete. You are ready to go on to the next step: **Document Upload**.

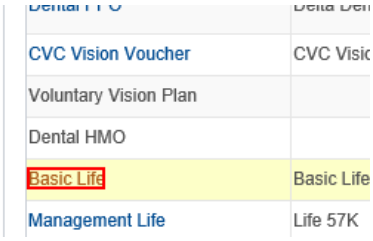
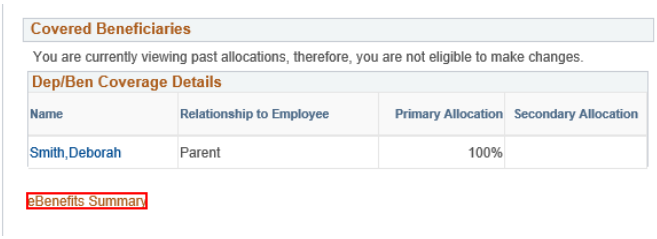
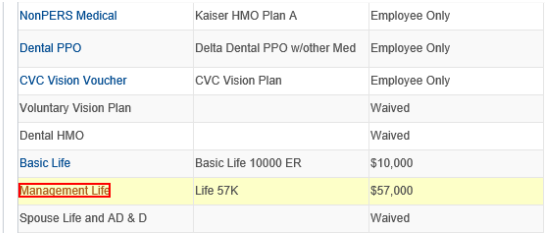
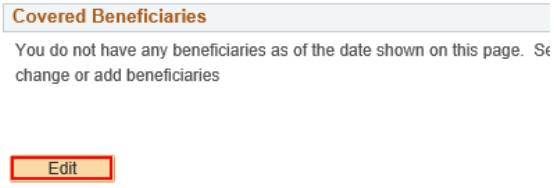
Step	Action
55.	Click the **Next** button. 
56.	The **Life Events - Document Upload** page displays. The Activity Guide indicates that this step is in progress. The * indicates that this step is a required step. You can not skip it. The **Life Event Documents** section lists the types of documents required. If you are adding children or step children as part of this life event, you must upload birth certificates for them as well as a copy of your marriage certificate. If you are not adding children, then you need to only upload a copy of your marriage certificate. If you only have paper copies of these documents, you will have to scan them and save them as a pdf in order to upload them. 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 marriage certificate.
57.	Click the **Add Attachment** button. 
58.	You must enter a description in the **Subject** field. This is a required field.
59.	Click in the **Subject** field. 

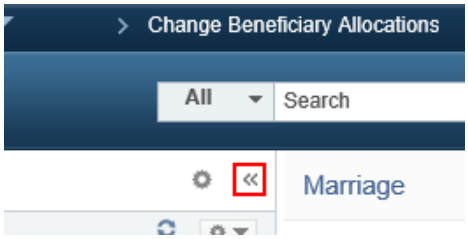
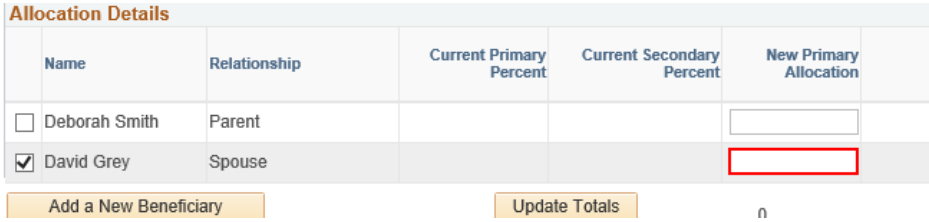
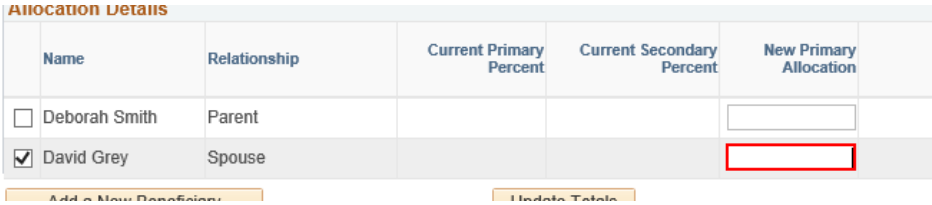
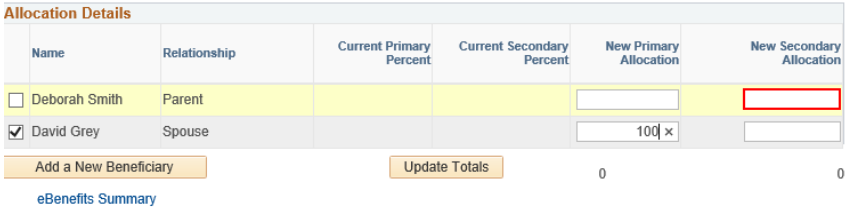
Step	Action
60.	Enter the desired information into the **Subject** field. Enter a valid value e.g. "**Marriage Certificate**". 
61.	Click the **Add Attachment** button. 
62.	The **File Attachment** window displays. Use this window to locate and upload the marriage certificate.
63.	Click in the **Help** field. 
64.	Click the **Marriage Certificate** list item. 
65.	Click the **Open** button. 

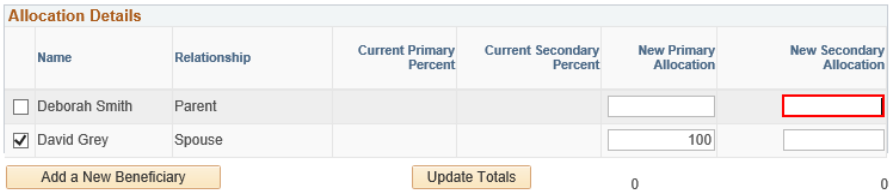
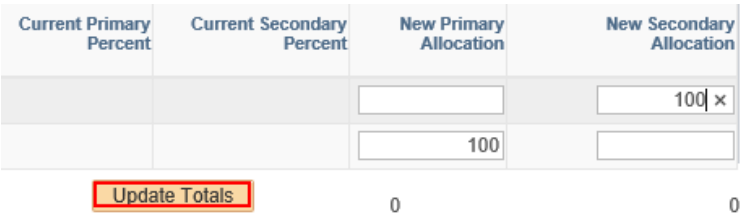
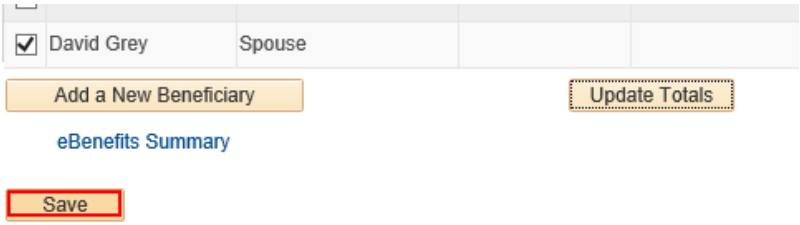
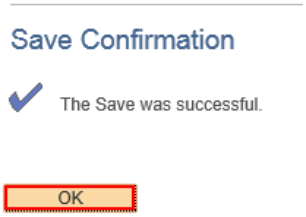
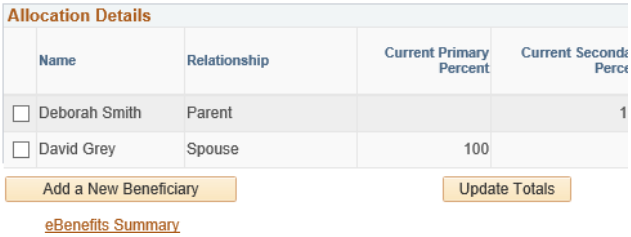
Step	Action
66.	Click the **Upload** button. 
67.	The **Document Definition - New Attachment** page displays. The **Selection Criteria** section displays the subject you entered previously and the name of the file you uploaded, in this case Marriage_Certificate.pdf. You can use the **View Attachment** 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.
68.	Click the **Save** button. 
69.	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.
70.	Click the **Next** button. 

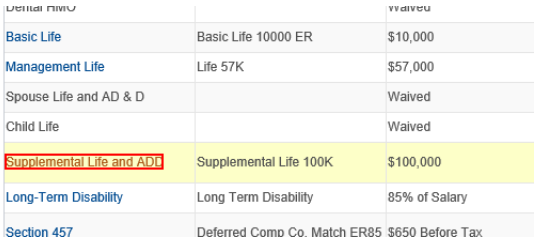
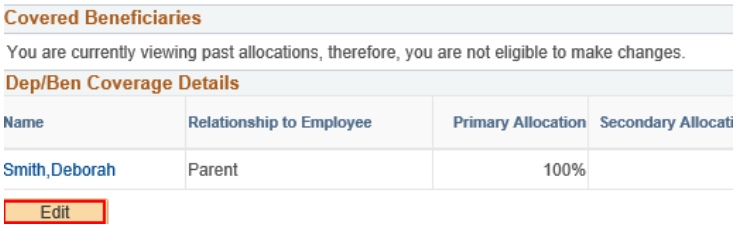
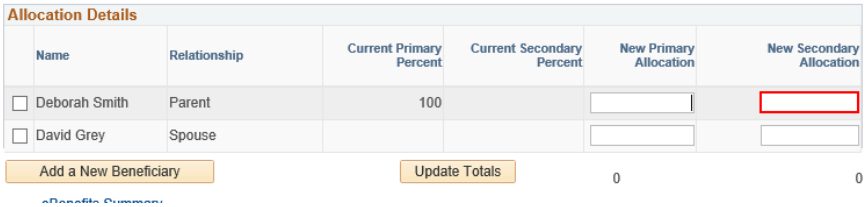
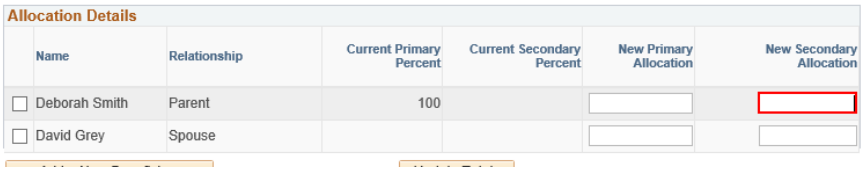
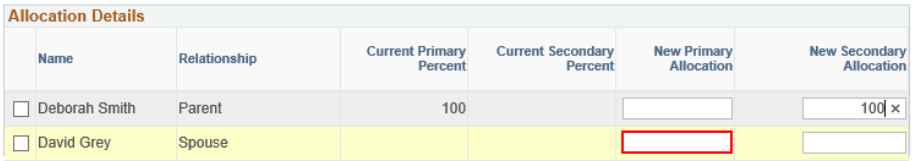
Step	Action
71.	The **Benefits Summary** page displays. This is the same page that you can access from the **Benefits Summary** link on the **Benefits Self Service** home page. Use if this page is covered in other portions of eBenefits training. The page lists all the types of benefits that are available 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 type 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 make some adjustments to allocation for insurance and/or deferred compensation plans. You can also change allocations outside of a life event. Working with allocations is also covered in other portions of eBenefits training. You will start with NonPERS Medical.
72.	Click the **NonPERS Medical** link. 
73.	The **NonPERS Medical** page displays. Currently, you are enrolled in Kaiser HMO Plan A, employee only. You will change this election to include your husband during the next step in the life event process, **Benefit Enrollment**.
74.	Click the **eBenefits Summary** link. 

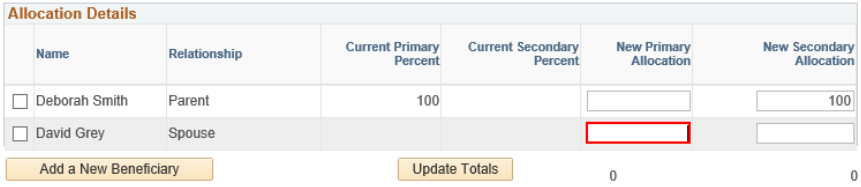
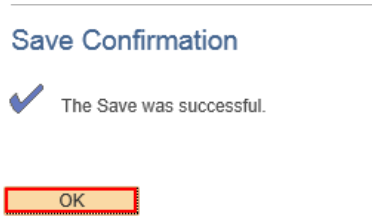
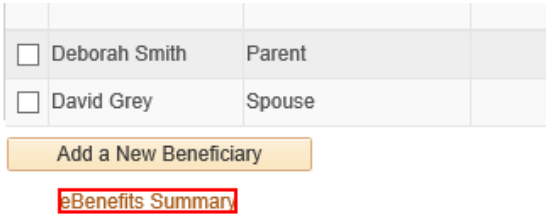
Step	Action
75.	Next you will review, Dental PPO. Click the **Dental PPO** link. 
76.	The **Dental PPO** page displays. Currently you are enrolled in a Delta Dental PPO w/other Med, employee only. You will add your husband to this plan in the next step in the life event process.
77.	Click the **eBenefits Summary** link. 
78.	Next, you will review your CVC Vision Voucher. Click the **CVC Vision Voucher** link. 
79.	The **CVC Vision Voucher** displays. You are currently enrolled, employee only. You will not change this enrollment.
80.	Click the **eBenefits Summary** link. 

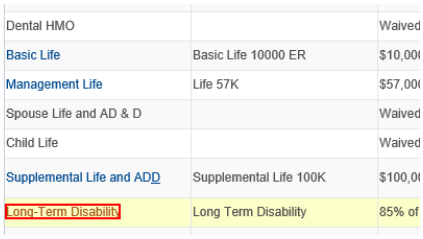
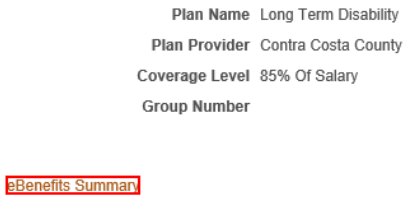
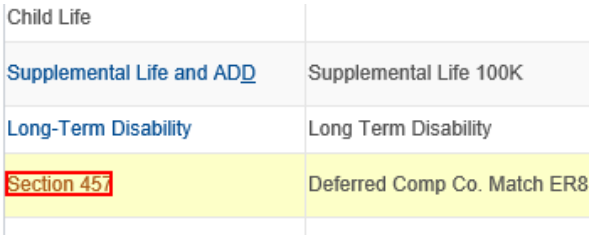
Step	Action
81.	Next you will review your Basic Life coverage. Click the **Basic Life** link. 
82.	The **Basic Life** page displays. You will not make any changes to your allocations for this benefit.
83.	Click the **eBenefits Summary** link. 
84.	Next, you will review **Management** Life. Click the **Management Life** link. 
85.	The **Management Life** page displays. Currently you do not have any allocations assigned. You will add your husband as a primary allocation and your mother as a secondary allocation. Working with allocations is also covered in other portions of eBenefits training.
86.	Click the **Edit** button. 

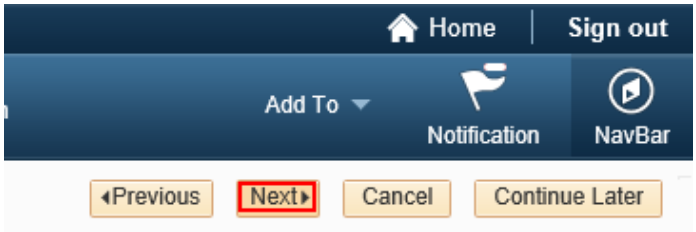
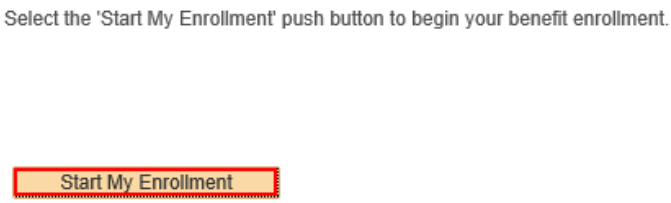
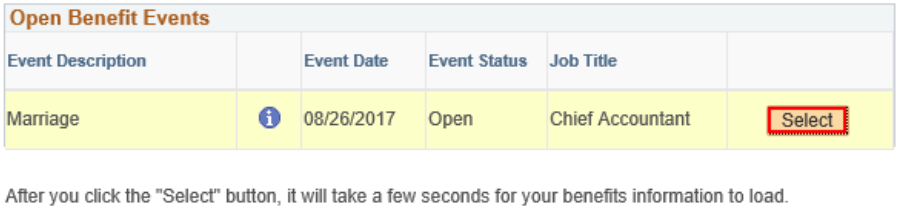
Step	Action
87.	Click the **Minimize eBenefits** button to see more of the Current Beneficiaries and allocations page. Doing so will hide the activity guide. 
88.	Next, you will add your husband as a primary allocation and your mother as a secondary allocation. Your primary and secondary allocations must each total 100. You can not make a dependent/beneficiary both a primary and a secondary allocation
89.	Click in the **New Primary Allocation** field. 
90.	Enter the desired information into the **New Primary Allocation** field. Enter a valid value e.g. "**100**". 
91.	Click in the **New Secondary Allocation** field. 

Step	Action
92.	Enter the desired information into the **New Secondary Allocation** field. Enter a valid value e.g. "**100**". 
93.	Click the **Update Totals** button. 
94.	Click the **Save** button. 
95.	Click the **OK** button. 
96.	The **Allocations Details** section now reflects the allocations you just entered.
97.	Click the **eBenefits Summary** link. 

Step	Action
98.	Next you will review your Supplemental Life and ADD coverage. Click the **Supplemental Life and ADD** link.  Basic Life | Basic Life 10000 ER | $10,000 Management Life | Life 57K | $57,000 Spouse Life and AD & D | | Waived Child Life | | Waived Supplemental Life and ADD | Supplemental Life 100K | $100,000 Long-Term Disability | Long Term Disability | 85% of Salary Section 457 | Deferred Comp Co. Match ER85 | $650 Before Tax
99.	The **Supplement Life and AD&D** page displays. You will change allocations to include your husband as a primary allocation and to change your mother to a secondary allocation.
100.	Click the **Edit** button.  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 Allocati Smith,Deborah | Parent | 100% Edit
101.	Click in the **New Secondary Allocation** field.  Allocation Details Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation Deborah Smith | Parent | 100 David Grey | Spouse Add a New Beneficiary | Update Totals | 0 | 0
102.	Enter the desired information into the **New Secondary Allocation** field. Enter a valid value e.g. "**100**".  Allocation Details Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation Deborah Smith | Parent | 100 David Grey | Spouse
103.	Click in the **New Primary Allocation** field.  Allocation Details Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation Deborah Smith | Parent | 100 | 100 David Grey | Spouse

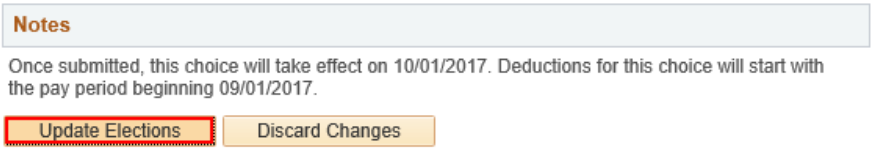
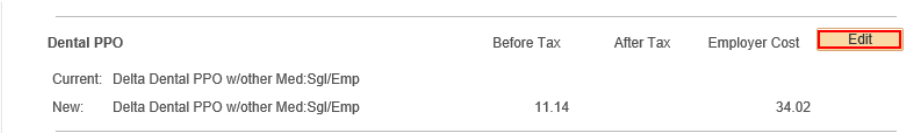
Step	Action
104.	Enter the desired information into the **New Primary Allocation** field. Enter a valid value e.g. "**100**". 
105.	Click the **Update Totals** button. 
106.	Click the **Save** button. 
107.	Click the **OK** button. 
108.	The **Change Current Beneficiaries and Allocations** page displays. The **Allocation Details** section displays the changes you just made.
109.	Click the **eBenefits Summary** link. 

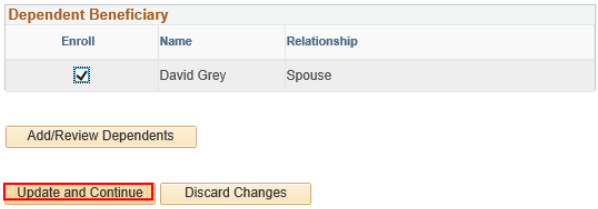
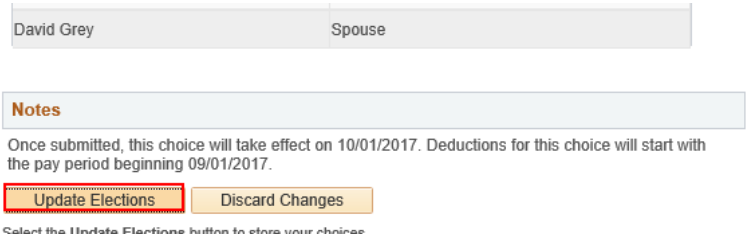
Step	Action
110.	Next you will review your Long Term Disability coverage. Click the **Long-Term Disability** link. 
111.	The **Long-Term Disability** page displays. You will not make any changes to this benefit.
112.	Click the **eBenefits Summary** link. 
113.	Next you will review your Section 457 coverage. Click the **Section 457** link. 
114.	The **Section 457** page displays. You will not change your coverage.
115.	Click the **eBenefits Summary** link. 

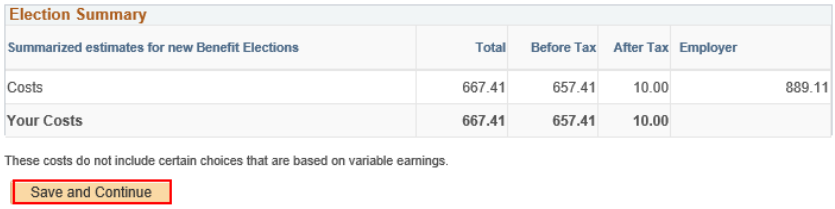
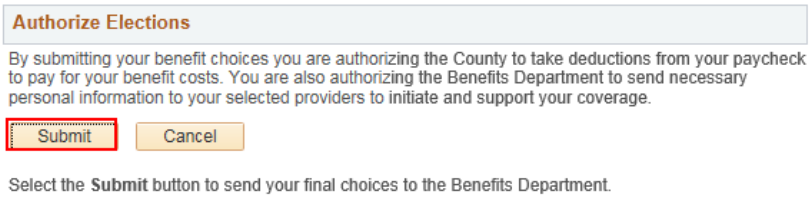
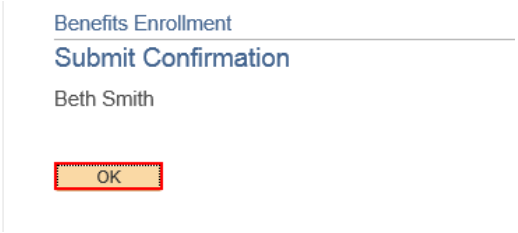
Step	Action
116.	You are now ready to start the next step, **Benefits Enrollment**. Click the **Next** button. 
117.	Click the **Start My Enrollment** button. 
118.	Review the text on the **Benefits Enrollment** page. Then click the **Select** button in the **Open Benefits Events** section.
119.	Click the **Select** button. 
120.	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 husband.
121.	Click the Scrollbar to move down the page.
122.	Click the scrollbar to move down the page.
123.	Click the scrollbar to move down the page.
124.	Click the Scrollbar to move down the page.
125.	Click the Scrollbar to move down the page.

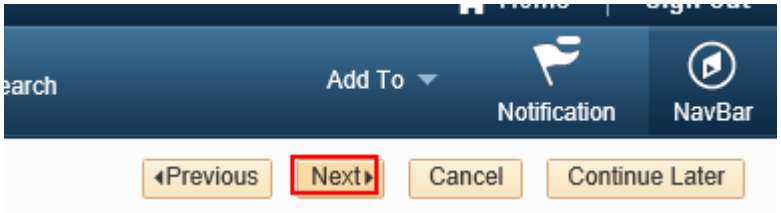
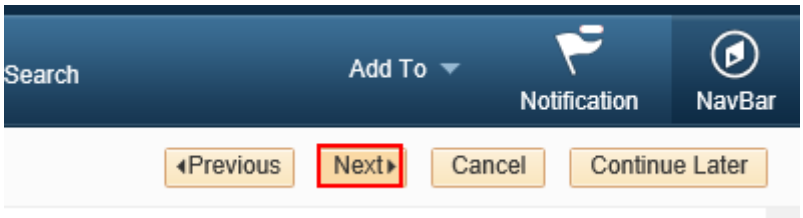
Step	Action
126.	The **Election Summary Section** displays your costs and the employer contribution for your current elections. If you do not want to change any of your elections, click the **I Have No Changes** button. For this example, you do want to make changes to your medical and dental coverage. Scroll to the top of the page.
127.	Click the Scrollbar to return to the top of the page.
128.	You will add your husband as a dependent to your **NonPERS Medical** and **Dental PPO** coverage. You will not change the plans you previously elected. You will start with NonPERS Medical.
129.	Click the **Edit** button. Enrollment Summary NonPERS Medical — Before Tax — After Tax — Employer Cost — Edit Current: Kaiser HMO Plan A:Sgl/Emp New: Kaiser HMO Plan A:Sgl/Emp — 282.69 — 435.38
130.	The **NonPERS Medical** page displays. Your current coverage is Kaiser HMO Plan A, employee only. You can use the **Cost Comparison for All Plans** link to view a comparison of the costs of NonPERS medical plans. You will use this link and view the costs for all plans.
131.	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
132.	The cost comparison displays in the Coverage details section. Use the scrollbars for the page and for the **Coverage Details** section to scroll through all plans.
133.	Click the scrollbar to move down the page.
134.	Click the scrollbar to move down the **Coverage Details** section.
135.	Click the scrollbar to move down the **Coverage Details** section.
136.	Click the scrollbar to move down the **Coverage Details** section.
137.	Click the scrollbar to move down the **Coverage Details** section.
138.	Click the scrollbar to move down the **Coverage Details** section.
139.	Click the scrollbar to move down the **Coverage Details** section.

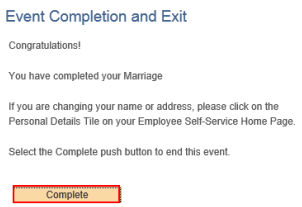
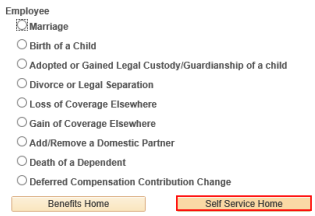
Step	Action
140.	Click the scrollbar to move down the **Coverage Details** section.
141.	Click the scrollbar to move down the **Coverage Details** section.
142.	Click the scrollbar to move down the **Coverage Details** section.
143.	You have reached the bottom of the Coverage Details section. Click the **Return** button. Return
144.	Details about each plan displays. For this example, you will not change from your current election. You will scroll to the bottom of the page to add your husband as a dependent to this plan.
145.	Click the scrollbar to move to the bottom of the page.
146.	The **Enroll Your Dependents** section displays. The **Dependent Beneficiary** section lists your husband. Select the Enroll check box to enroll him in your NonPERS Medical coverage. If there are other dependents that were not added earlier in the process, you can use the **Add/Review Dependents** button to add them to the **Dependent Beneficiary** section and then select them for coverage. For this example you will not add any additional dependents.
147.	Click the **Enroll** option. Dependent Beneficiary Enroll | Name | Relationship ☐ | David Grey | Spouse

Step	Action
148.	Use the **Update and Continue** button to update your elections and their coverage. If you made changes to the plan you selected and/or to dependents covered under the plan and have changed your mind, you can click the **Discard Changes** button. Any changes you made on this page will be discarded and your original elections retained.
149.	Click the **Update and Continue** button. 
150.	The **NonPERS Medical** now displays -- Your new election: Kaiser HMO Plan A, Employee plus one dependent -- Your estimated cost is $632.18 per pay period -- Your husband is a covered dependent on this plan. The **Notes** section indicates when these changes will take place and when your new deductions will start.
151.	Click the **Update Elections** button. 
152.	The **Enrollment Summary** section displays. Next you will add your husband to your Dental PPO coverage.
153.	Click the **Edit** button. 
154.	The **Dental PPO** page displays. Your current coverage is Delta Dental PPO, employee only. You will not change this plan. You will add your husband to this plan as a covered dependent.

Step	Action
155.	You can use the **Cost Comparison for All Plans** link to view cost comparisons. You will not use this link. You will scroll to the bottom of the page and select your husband for coverage under your current plan.
156.	Click the scrollbar to move to the bottom of the page.
157.	The **Enroll Your Dependents** selection displays. Use this section to add your husband to your Dental PPO coverage.
158.	Click the **Enroll** option. 
159.	Click the **Update and Continue** button. 
160.	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.
161.	Click the **Update Elections** button. 
162.	You are now ready to save your benefit elections. You will scroll to the bottom of the **Benefits Enrollment** page.
163.	Click the scrollbar to move to the bottom of the page.

Step	Action
164.	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**)
165.	Click the **Save and Continue** button.  Election Summary Summarized estimates for new Benefit Elections | Total | Before Tax | After Tax | Employer Costs | 667.41 | 657.41 | 10.00 | 889.11 Your Costs | 667.41 | 657.41 | 10.00 These costs do not include certain choices that are based on variable earnings. Save and Continue
166.	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).
167.	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.
168.	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.
169.	Click the **OK** button.  Benefits Enrollment Submit Confirmation Beth Smith OK

Step	Action
170.	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.
171.	Click the **Next** button. 
172.	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.
173.	Click the scrollbar to move down the page.
174.	Click the scrollbar to move to the top of the page.
175.	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.**
176.	Click the **Next** button. 
177.	The **Event Completion and Exit** page displays. Note, if you are changing your name, address or phone information, you must make these changes using the **Personal Details** tile on the Employee Self Service home page. Requesting a name change and updating address, phone, and e-mail information are covered in eProfile training. For this topic, you are ready to complete this event.

Step	Action
178.	Click the **Complete** button. 
179.	Click the **Self Service Home** button. 
180.	**End of Procedure.**