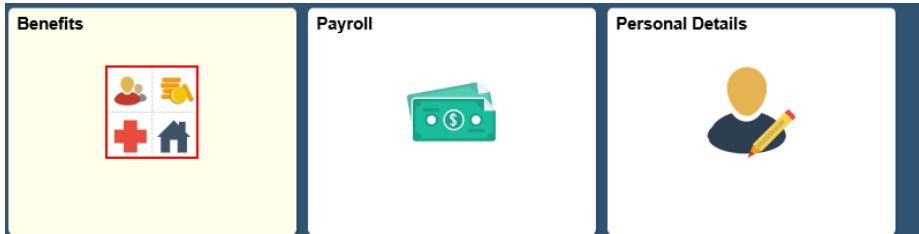





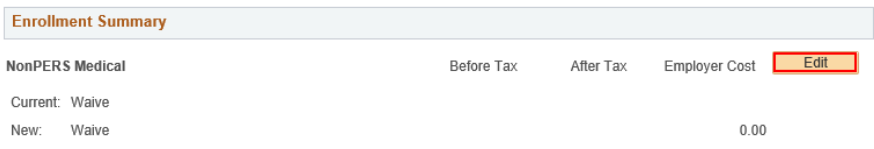
## Enrolling/modifying enrollment during an Open Enrollment Period

Step	Action
1.	<p>Click the <b>Benefits</b> button.</p> 
2.	<p>The <b>Benefits Self Service</b> 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.</p> <p>This page contains the links that you use to review and manage your benefits information. These links allow you to</p> <ul style="list-style-type: none"> <li>-- Review benefits summary information—to see your current or past benefits elections</li> <li>-- Review and/or edit your Dependent and beneficiary information</li> <li>-- Update your benefits information after you have experienced a qualifying Life Event—marriage, birth of a child, divorce, adoption, etc.</li> <li>-- Enroll in benefits during an open enrollment period and/or at the time of hire</li> <li>-- Upload documents in support of a qualifying life event and dependent verification</li> <li>-- Access benefits plan guides, benefits forms, and provider links</li> <li>-- Submit a request for a CVC Voucher</li> </ul> <p>Each of these links is covered in topics in Employee Self Service training.</p>
3.	<p>Click the <b>Benefits Enrollment</b> link.</p> 
4.	<p>The <b>Benefits Enrollment</b> page displays.</p> <p>Review the text on this page.</p>

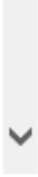
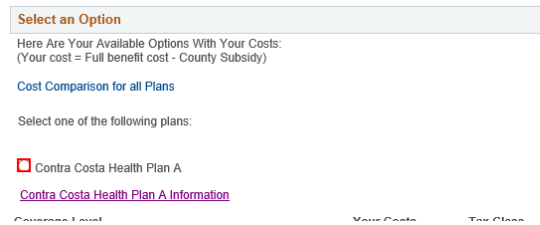


Step	Action																		
5.	<p>This text reminds you that:</p> <ul style="list-style-type: none"><li>- Benefit elections are for a full year and cannot be changed unless you experience a qualifying life event</li><li>- You must re-enroll in Health Care Spending Accounts and the Dependent Care Assistance program each year; enrollment from the current year does not automatically carry over to the next year.</li><li>- Your contributions to deferred compensation remain in effect until you submit a request to change them</li></ul>																		
6.	You can use the <b>Information</b> icon to view additional information about enrollment.																		
7.	<p>Click the <b>Event Information</b> button.</p> <p><small>NOTE: Some events may be temporarily closed until you have completed enrollment.</small></p> <table><tr><th colspan="5">Open Benefit Events</th></tr><tr><th>Event Description</th><th></th><th>Event Date</th><th>Event Status</th><th>Job Title</th></tr><tr><td>Open Enrollment</td><td></td><td>01/01/2018</td><td>Open</td><td>MH Specialist II</td></tr></table> <p>After you click the "Select" button, it will take a few seconds for your benefits informat</p>	Open Benefit Events					Event Description		Event Date	Event Status	Job Title	Open Enrollment		01/01/2018	Open	MH Specialist II			
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Open Enrollment		01/01/2018	Open	MH Specialist II															
8.	<p>Click the <b>OK</b> button.</p> <p>Open Benefits Event</p> <p>This benefits event is currently open for enrollment. To make your benefit choices, go back to the Benefits Enrollment page and use the Select button to access your benefit event.</p> <p><b>OK</b></p>																		
9.	<p>The <b>Open Benefit Events</b> section displays your enrollment events, the <b>Event Description</b>, the <b>Event Date</b>, <b>Event Status</b>, and your <b>Job Title</b>.</p> <p>If there is a <b>Select</b> button for the event, the event is open for enrollment. Click the <b>Select</b> button to start enrollment.</p>																		
10.	<p>Click the <b>Select</b> button.</p> <table><tr><th colspan="6">Open Benefit Events</th></tr><tr><th>Event Description</th><th></th><th>Event Date</th><th>Event Status</th><th>Job Title</th><th></th></tr><tr><td>Open Enrollment</td><td></td><td>01/01/2018</td><td>Open</td><td>MH Specialist II</td><td><b>Select</b></td></tr></table>	Open Benefit Events						Event Description		Event Date	Event Status	Job Title		Open Enrollment		01/01/2018	Open	MH Specialist II	<b>Select</b>
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Step	Action
11.	<p>The <b>Open Enrollment</b> page displays.</p> <p>This page lists each of the benefits types for which you can enroll and indicates your current enrollments.</p> <p>You will use the scroll bar to review this information.</p>
12.	<p>Notice, you are currently enrolled in <b>Dental PPO</b> and have waived coverage for <b>Non PERS Medical</b>, <b>Dental HMO</b> (you cannot enroll in both a <b>Dental PPO</b> and a <b>Dental HMO</b> at the same time), and for <b>Voluntary Vision Plan</b>.</p>
13.	<p>Click the scrollbar.</p>
14.	<p>Notice, you are currently enrolled in <b>Basic Life</b>.</p> <p>You have waived coverage for: <b>Health Savings Account, Health Care Spending Account, Flex Spending Dependent Care, Supplemental Life and AD&amp;D, Spouse Life and AD &amp; D</b>.</p>
15.	<p>Click the scrollbar.</p>
16.	<p>Notice you have also waived coverage for <b>Child Life</b> and <b>Section 457</b>.</p>
17.	<p>Click the scrollbar to return to the top of the page.</p>
18.	<p>You are now ready to begin your enrollment for the coming year. You will start with <b>NonPERS Medical</b>.</p> <p>Currently you are not enrolled in a NonPERS Medical plan. You want to enroll in one for the coming year and to include your wife and children in its coverage.</p>
19.	<p>Click the <b>Edit</b> button.</p> 
20.	<p>The <b>NonPERS Medical</b> page displays. This page lists all of your enrollment opens and their associated costs.</p> <p>The page notes that you have currently waived coverage and that this will remain in effect unless you chose to enroll in a plan during this enrollment period.</p> <p>The page also notes that, depending on the choice of plans, your options under <b>Health Saving Accounts</b> may change. For this example you will not enroll in a <b>Health Savings Account</b>. You will enroll in a <b>Health Care Spending Account</b>.</p>
21.	<p>You can use the <b>Cost Comparison for All Plans</b> link to view information about how different plans compare in cost.</p> <p>For this example, you will not use this link.</p>



Step	Action
22.	Next, you will review the plans on this page, using the scroll bar to move down the page.
23.	Click the scrollbar.
24.	Click the scrollbar.
25.	Click the scrollbar.
26.	Click the scrollbar.
27.	Click the scrollbar. 
28.	Notice the <b>Waive</b> option is currently selected.  You have decided to enroll in the <b>Contra Costa Health Plan A</b> . You will scroll to the top of the page and select this option. When you do so, the <b>Waive</b> option will be deselected automatically.
29.	Click the scrollbar.
30.	You are back at the top of the <b>NonPERS Medical</b> page.  The <b>Contra Costa Health Plan A</b> option is visible. You will select this option.
31.	Click the <b>Yes</b> option.  
32.	Notice the <b>Contra Costa Health Plan A</b> option is now selected. The page still indicates that you have waived coverage, because you have not yet updated your enrollment.  You will first add your dependents and then update and save your enrollment.
33.	Click the scrollbar.
34.	The <b>Enroll Your Dependents Section</b> displays.  The <b>Dependent Beneficiary</b> section lists your current dependents and beneficiaries. You can use the <b>Add/Review Dependents</b> button to review information about your current dependents/beneficiaries or to add new dependent beneficiaries.  Reviewing, editing, and adding Dependent/beneficiaries are covered in other parts of eBenefits training. For this topic you will not use this button.

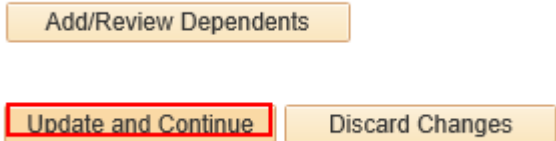
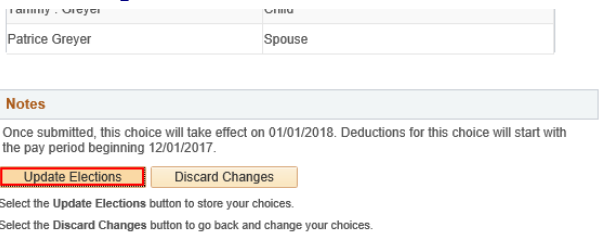


Step	Action																		
35.	For this example, you will enroll your wife and each of your children.																		
36.	<p>Click the <b>Enroll</b> option.</p> <table><tr><th colspan="3">Dependent Beneficiary</th></tr><tr><th>Enroll</th><th>Name</th><th>Relationship</th></tr><tr><td><input type="checkbox"/></td><td>Thomas Greyer</td><td>Child</td></tr><tr><td><input type="checkbox"/></td><td>Tammy . Greyer</td><td>Child</td></tr><tr><td><input type="checkbox"/></td><td>Mary Greyer</td><td>Child</td></tr><tr><td><input type="checkbox"/></td><td>Patrice Greyer</td><td>Spouse</td></tr></table>	Dependent Beneficiary			Enroll	Name	Relationship	<input type="checkbox"/>	Thomas Greyer	Child	<input type="checkbox"/>	Tammy . Greyer	Child	<input type="checkbox"/>	Mary Greyer	Child	<input type="checkbox"/>	Patrice Greyer	Spouse
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40.	You are now ready to update your enrollment.																		
41.	<p>Click the <b>Update and Continue</b> button.</p> <div><div>Add/Review Dependents</div><div><div>Update and Continue</div><div>Discard Changes</div></div></div>																		
42.	The <b>Your Choice</b> section indicates that you have selected Contra Costa Health Plan A with Employee + Two Dependents coverage.																		



Step	Action
43.	The <b>Your Estimated Per-Pay-Period Cost</b> section indicates that you cost is \$456.01.
44.	The <b>Your Covered Dependents Section</b> indicates that all of your dependents are included in coverage under this plan.
45.	<p>Next, you will update your elections.</p> <p>If you have changed your mind, you can use the <b>Discard Changes</b> button and the system will discard your choice.</p> <p>You can then, if you want go back and make another selection or decide to keep your current election of waive for NonPERS medical.</p> <p>For this example you will update your elections.</p>
46.	<p>Click the <b>Update Elections</b> button.</p> <div><div>Notes</div><p>Once submitted, this choice will take effect on 01/01/2018. Deductions for this choice will start with the pay period beginning 12/01/2017.</p><div><div>Update Elections</div><div>Discard Changes</div></div></div>
47.	<p>You are now back at the top of the <b>Open Enrollment</b> page.</p> <p>Notice the row for <b>NonPERS Medical</b> now indicates that your new enrollment is <b>Contra Costa Health Plan A: Emp+2 Deps.</b></p>
48.	<p>Currently you are enrolled in a Delta Dental PPO w/CCHP Plan. You have coverage for yourself, your wife and two children.</p> <p>Your third child is too old (26) to be covered on this plan.</p> <p>You will not change plans. All of your eligible dependents are currently covered.</p> <p>Remember, you can not enroll in both <b>Dental PPO</b> and <b>Dental HMO</b> at the same time. The system will generate an error message when you attempt to save your enrollments.</p>
49.	<p>Click the <b>Edit</b> button.</p> <div><div><div>New: <b>Contra Costa Health Plan A:Emp+2 Deps</b></div><div>456.01</div><div>1,778.56</div></div><div><div>Dental PPO</div><div>Before Tax</div><div>After Tax</div><div>Employer Cost</div><div>Edit</div></div><div><div>Current: Delta Dental PPO w/CCHP Plan:Emp+2 Deps</div><div></div><div></div><div></div></div><div><div>New: Delta Dental PPO w/CCHP Plan:Emp+2 Deps</div><div>9.00</div><div>93.00</div></div></div>
50.	<p>The <b>Dental PPO</b> page displays. There is only one plan listed on this page, the Delta Dental PPO w/CCHP Plan. You are currently covered under this plan.</p> <p>If you wanted to waive coverage for <b>Dental PPO</b>, you could select the <b>Waive</b> option. For this example, you do not want to waive coverage.</p>
51.	Click the scrollbar.



Step	Action
52.	<p>The <b>Enroll Your Dependents</b> section displays.</p> <p>Currently all of your eligible dependents are covered under this plan. You will not make any changes to enrolled dependents.</p> <p>You will not use the <b>Add/Review Dependents</b> button.</p>
53.	<p>Click the <b>Update and Continue</b> button.</p> 
54.	<p>The <b>Your Choice</b> section displays your current choice: Delta Dental PPO w/CCHP Plan: Employee + Two Dependents.</p> <p>The <b>Your Estimated Per-Pay-Period Cost</b> section indicates a cost of \$9.00.</p> <p>The <b>Your Covered Dependents</b> section indicates that your wife, and two children are covered.</p>
55.	<p>If you have changed your mind, you can use the <b>Discard Change</b> button to discard your changes. If you do not make new selections, your current enrollment would continue.</p> <p>For this example, you will not use the <b>Discard Changes</b> button.</p> <p>You are ready to update your elections.</p>
56.	<p>Click the <b>Update Elections</b> button.</p> 
57.	<p>Notice, The <b>Current</b> and <b>New</b> fields for <b>Dental PPO</b> contain the same values. Adding your two other children does not change the version of the plan in which you have enrolled: Emp+2 Deps includes all the dependents you have enrolled, even if the number of enrolled dependents is greater than 2.</p>
58.	<p>Next, you will enroll in a <b>Health Care Spending Account</b>.</p> <p>You use the scrollbar to move to the section of the <b>Open Enrollment</b> page that displays <b>Health Care Spending Account</b>.</p>
59.	<p>Click the scrollbar.</p>



Step	Action
60.	<p>Notice, you current have waived coverage for <b>Health Care Spending Account</b>.</p> <p>You will use the <b>Edit</b> button to begin enrollment in this benefit.</p>
61.	<p>Click the <b>Edit</b> button.</p> <p>Health Care Spending Account      Before Tax      After Tax      Employer Cost      <b>Edit</b></p> <p>Current: Waive</p> <p>New: <b>No Coverage</b></p>
62.	<p>The <b>Health Care Spending Account</b> page displays.</p> <p>You can elect to contribute up to \$2600 per year to this account. Currently you have waived coverage.</p> <p>You want to enroll in this benefit.</p>
63.	<p>Click the <b>Yes</b> option for <b>Health Care Spending Account</b>.</p> <p><b>Select an Option</b></p> <p><input type="radio"/> No, I do not want to enroll</p> <p><input checked="" type="radio"/> Health Care Spending Account</p>
64.	<p>Notice the system now displays a new section.</p> <p>You can use the <b>Annual Pledge</b> field to enter the amount, up to a maximum of \$2600, that you want to contribute to this plan.</p> <p>You can also use the <b>Worksheet</b> link to access a worksheet that will help you determine how much you will contribute.</p> <p>For this example, you will use the <b>Worksheet</b> link.</p>
65.	<p>Click the <b>Worksheet</b> link.</p> <p>This plan requires that you specify an annual pledge amount.</p> <p>Annual Pledge <input type="text"/> <b>Worksheet</b>      Select the Worksheet button to help calculate your annual pledge for this plan year.</p>



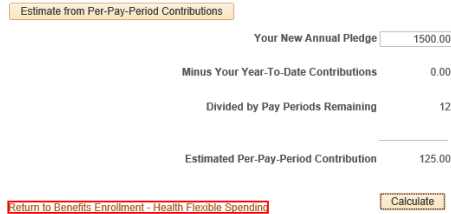
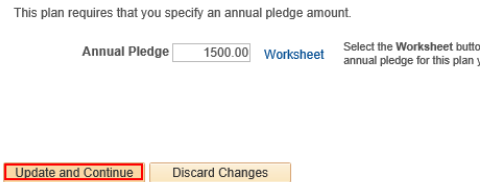


Step	Action
66.	<p>The <b>Flexible Spending Accounts</b> worksheet page.</p> <p>Currently this page is set up to calculate per pay period contributions based on a specified annual contribution amount.</p> <p>The <b>Estimate from Per-Pay-Period</b> button is a toggle. Use it to change the worksheet to a display that enables you to calculate the annual contribution based on a per pay period contribution.</p>
67.	<p>Click the <b>Estimate from Per-Pay-Period Contributions</b> button.</p> <p>Steve Greyer</p> <div><p><b>Flexible Spending Accounts Worksheet</b></p><p>Use this worksheet to determine your desired Annual Pledge. Once you enter your New Annual Pledge, select the Calculate button to estimate your per-pay-period contributions.</p><p><b>Estimate from Per-Pay-Period Contributions</b></p><p>Your New Annual Pledge <input type="text"/></p><p>Minus Your Year-To-Date Contributions</p></div>
68.	<p>Notice the fields that display allow you to calculate based on per pay period contributions.</p> <p>You will now toggle back and use the worksheet to calculate based on an annual contribution.</p>
69.	<p>Click the <b>Estimate from Annual Pledge</b> button.</p> <p>Steve Greyer</p> <div><p><b>Flexible Spending Accounts Worksheet</b></p><p>Use this worksheet to enter your estimated Per-Pay-Period Contribution. Once you enter your Per-Pay-Period Contribution, select the Calculate button to determine your annual pledge amount.</p><p><b>Estimate from Annual Pledge</b></p><p>Estimated Per-Pay-Period Contribution <input type="text" value="0.00"/></p><p>Multiplied by Pay Periods Remaining 12</p></div>
70.	<p>You are now ready to use the worksheet.</p> <p>First you will perform a calculation based on an annual contribution of \$2000.</p>
71.	<p>Click in the <b>Your New Annual Pledge</b> field.</p> <div><p>Your New Annual Pledge <input type="text" value="0.00"/></p><p>Minus Your Year-To-Date Contributions 0.00</p><p>Divided by Pay Periods Remaining 12</p><hr/><p>Estimated Per-Pay-Period Contribution 0.00</p></div>



Step	Action
72.	<p>Enter the desired information into the <b>Your New Annual Pledge</b> field. Enter a valid value e.g. "<b>2000</b>".</p> <p><b>od Contributions</b></p> <p>Your New Annual Pledge <input type="text" value="0.00"/></p> <p>Minus Your Year-To-Date Contributions 0.00</p> <p>Divided by Pay Periods Remaining 12</p> <p>Estimated Per-Pay-Period Contribution 0.00</p>
73.	<p>Click the <b>Calculate</b> button.</p> <p>Minus Your Year-To-Date Contributions 0.00</p> <p>Divided by Pay Periods Remaining 12</p> <p>Estimated Per-Pay-Period Contribution 0.00</p> <p><a href="#">s Enrollment - Health Flexible Spending</a> <b>Calculate</b></p>
74.	<p>Notice the system calculated a per pay period contribution of \$166.67 based on an annual contribution of \$2000.</p> <p>For this example you want to reduce the per pay period amount. You will use the worksheet to calculate the per pay period cost based on an annual contribution of \$1500.</p>
75.	<p>Click in the <b>Your New Annual Pledge</b> field.</p> <p>our desired Annual Pledge. Once you enter your New Annual n to estimate your per-pay-period contributions.</p> <p><b>Contributions</b></p> <p>Your New Annual Pledge <input type="text" value="2000.00"/></p> <p>Minus Your Year-To-Date Contributions 0.00</p> <p>Divided by Pay Periods Remaining 12</p>
76.	<p>Enter the desired information into the <b>Your New Annual Pledge</b> field. Enter a valid value e.g. "<b>1500</b>".</p> <p><b>Your New Annual Pledge</b> <input type="text" value="2000.00"/></p>
77.	<p>Click the <b>Calculate</b> button.</p> <p>Minus Your Year-To-Date Contributions 0.00</p> <p>Divided by Pay Periods Remaining 12</p> <p>Estimated Per-Pay-Period Contribution 166.67</p> <p><a href="#">liment - Health Flexible Spending</a> <b>Calculate</b></p>

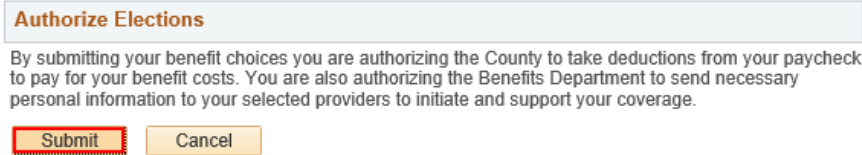
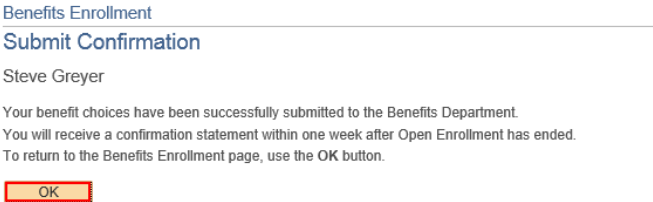
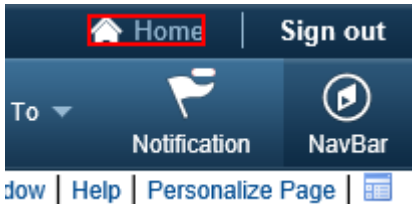


Step	Action
78.	<p>Notice, the per period pay period cost is now estimated at \$125.</p> <p>For this example, you are happy with that amount.</p> <p>Use the Return to <b>Benefits Enrollment - Health Flexible Spending</b> link to return to the <b>Health Care Spending Account</b> page.</p>
79.	<p>Click the <b>Return to Benefits Enrollment - Health Flexible Spending</b> link.</p> 
80.	<p>The <b>Health Care Spending Account</b> page displays.</p> <p>Notice the <b>Annual Pledge</b> field is populated with 1500, the amount you had last specified on the worksheet. You can edit this value if you want and/or return to the worksheet and experiment with the effects of other annual contribution amounts.</p> <p>For this example, you are happy with the current amount.</p>
81.	<p>You are now ready to begin updating your enrollment for <b>Health Care Spending Account</b>.</p>
82.	<p>Click the <b>Update and Continue</b> button.</p> 
83.	<p>The <b>Your Choice</b> section indicates that you have elected to enroll in the Health Care Spending Account with an annual contribution of \$1500.</p> <p>The <b>Your Contributions</b> section indicates that your per pay period contribution is estimated at \$125.</p> <p>The <b>Notes</b> section indicates when this choice will take effect and when deductions from your pay will begin.</p>
84.	<p>To accept these changes, click the <b>Update Election</b> button.</p> <p>To discard the changes, click the <b>Discard Changes</b> button.</p>



Step	Action															
85.	<p>Click the <b>Update Elections</b> button.</p> <div><p><b>Your Contributions</b></p><p>Your approximate per-pay-period contribution will be \$125.00.</p><p><b>Notes</b></p><p>Once submitted, this choice will take effect on 01/01/2018.</p><p>Deductions for this choice will start with the pay period beginning 01/01/2018.</p><p><b>Update Elections</b> <b>Discard Changes</b></p><p>Select the <b>Update Elections</b> button to store your choices.</p><p>Select the <b>Discard Changes</b> button to go back and change your choices.</p></div>															
86.	<p>You have now completed the editing and/or adding enrollments for the upcoming year. You do not want to enroll in any additional benefit types or change your <b>Basic Life</b> enrollment.</p> <p>You have enrolled in</p> <ul style="list-style-type: none"><li>- A <b>NonPERS Medical</b> plan (a new enrollment)</li><li>- Added your children to your <b>Dental PPO</b> plan</li><li>- Added enrollment in a <b>Health Care Spending Account</b> plan</li></ul> <p>You have kept your current enrollments in <b>Basic Life</b> and <b>CCC Retirement</b>.</p> <p>You are now ready to save your choices.</p>															
87.	Click the scrollbar.															
88.	Review information in the <b>Election Summary</b> section. This displays your total before and after tax costs per pay period and the County's contribution.															
89.	<p>Click the <b>Save and Continue</b> button.</p> <div><p><b>Election Summary</b></p><table><tr><th>Summarized estimates for new Benefit Elections</th><th>Total</th><th>Before Tax</th><th>After Tax</th><th>Employer</th></tr><tr><td>Costs</td><td>590.01</td><td>590.01</td><td>0.00</td><td>1,872.36</td></tr><tr><td>Your Costs</td><td>590.01</td><td>590.01</td><td>0.00</td><td></td></tr></table><p>These costs do not include certain choices that are based on variable earnings.</p><p><b>Save and Continue</b></p></div>	Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax	Employer	Costs	590.01	590.01	0.00	1,872.36	Your Costs	590.01	590.01	0.00	
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax	Employer												
Costs	590.01	590.01	0.00	1,872.36												
Your Costs	590.01	590.01	0.00													
90.	<p>The <b>Submit Benefits Choices</b> page displays.</p> <p>Review the text that appears on this page. This text reminds you that you should not submit your elections until you have enrolled in all benefits for which you want to enroll and that you are satisfied with your choices.</p> <p>It also tells you that you can still go back and make changes. To do so click the Cancel button. You will be returned to the <b>Enrollment Summary</b> page and from there you can review and/or edit your elections.</p> <p>The page also reminds you that once your submission is processed by Benefits, you may not be able to make further changes until the next open enrollment period or until you experience a qualifying life event.</p>															



Step	Action
91.	For this example, you are ready to submit your elections to Benefits.
92.	<p>Click the <b>Submit</b> button.</p> <p><small>NEAR OPEN ENROLLMENT PERIOD or if you have a qualifying event such as a family status change.</small></p> 
93.	<p>The <b>Submit Confirmation</b> page displays.</p> <p>This page indicates that your submission was successful and indicates that you will receive a confirmation state within a week after the open enrollment period has closed.</p>
94.	<p>Click the <b>OK</b> button.</p> 
95.	<p><b>Benefits Enrollment</b> page displays.</p> <p>The <b>Open Benefits Events</b> section indicates that your selections for this open enrollment period have been submitted to Benefits.</p>
96.	<p>Click the <b>Home</b> link.</p> 
97.	<p><b>End of Procedure.</b></p>