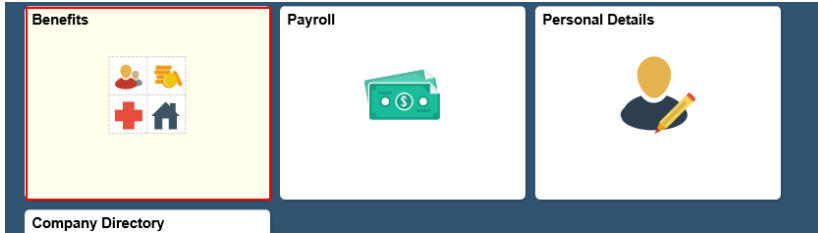
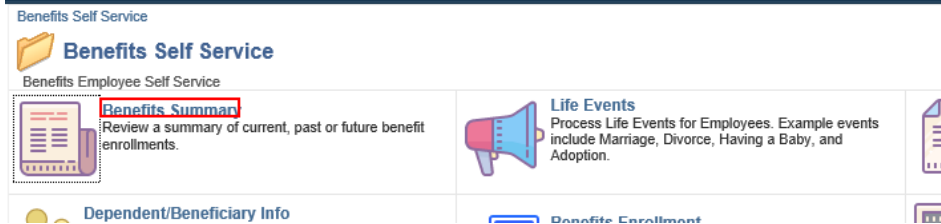
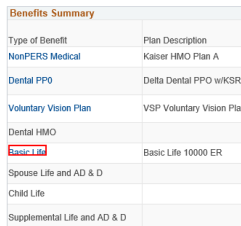




Modifying an Allocation

Step	Action
1.	<p>Click the Benefits button.</p> 
2.	<p>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.</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"> -- 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 benefit guides, forms, and provider links -- Request a CVC Voucher
3.	<p>Click the Benefits Summary link.</p> 
4.	<p>The Benefits Summary page displays.</p> <p>The Benefits Summary table lists your elections as of the current date, the date that displays in the date field to the left of the Go button.</p> <p>The table lists the type of benefit, the plan in which you are enrolled, and information about your coverage or participation in a plan.</p>

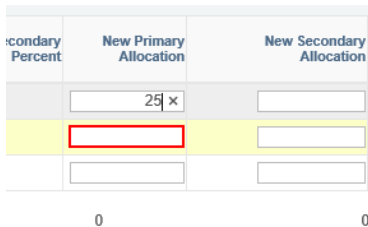
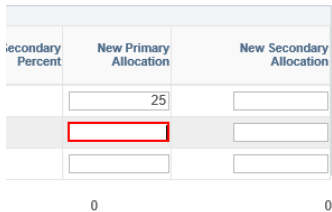
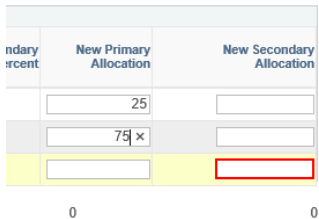
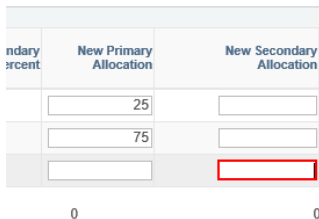


Step	Action																		
5.	<p>For example, you are currently enrolled in</p> <ul style="list-style-type: none"> -- A Non-PERS Medical plan—Kaiser HMO Plan A with family coverage -- A Dental PPO plan—Delta Dental PPO with Family Coverage -- A Vision plan--Vision Service Plan with family coverage -- Basic Life—Basic Life 10000 ER plan in the amount of \$10,000 -- Section 457 with a contribution of \$75 before taxes -- DC Special Benefit \$25/\$150 with a contribution of \$25 before taxes -- And in CCC PEPR Retirement—PEP414 																		
6.	<p>You have waived coverage for</p> <ul style="list-style-type: none"> -- Dental HMO -- Spouse Life -- Child Life -- Supplemental Life and ADD -- Health Care Savings Account -- Flex Spending Dependent Care -- And Health Saving Account 																		
7.	<p>If you want to see what your enrollments were for a different date, you can change the date in the date field. When you first enter this page, the date will default to the current date. You can view coverage for past dates as well as future dates.</p>																		
8.	<p>Allocations are associated with Life Insurance and Savings plans. You is currently enrolled in three plans with allocations: Basic Life, Section 457 and DC Special Benefit \$25/\$150.</p> <p>Note allocations can differ for each plan or can be the same for all plans.</p> <p>For this example, you will work with your allocations for Basic life.</p>																		
9.	<p>Click the Basic Life link.</p>  <table border="1"> <thead> <tr> <th>Type of Benefit</th> <th>Plan Description</th> </tr> </thead> <tbody> <tr> <td>NonPERS Medical</td> <td>Kaiser HMO Plan A</td> </tr> <tr> <td>Dental PPO</td> <td>Delta Dental PPO w/KSR</td> </tr> <tr> <td>Voluntary Vision Plan</td> <td>VSP Voluntary Vision Pla</td> </tr> <tr> <td>Dental HMO</td> <td></td> </tr> <tr> <td>Basic Life</td> <td>Basic Life 10000 ER</td> </tr> <tr> <td>Spouse Life and AD & D</td> <td></td> </tr> <tr> <td>Child Life</td> <td></td> </tr> <tr> <td>Supplemental Life and AD & D</td> <td></td> </tr> </tbody> </table>	Type of Benefit	Plan Description	NonPERS Medical	Kaiser HMO Plan A	Dental PPO	Delta Dental PPO w/KSR	Voluntary Vision Plan	VSP Voluntary Vision Pla	Dental HMO		Basic Life	Basic Life 10000 ER	Spouse Life and AD & D		Child Life		Supplemental Life and AD & D	
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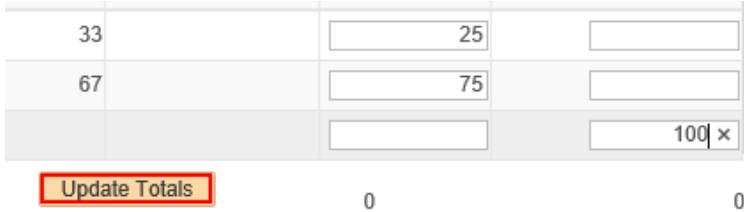
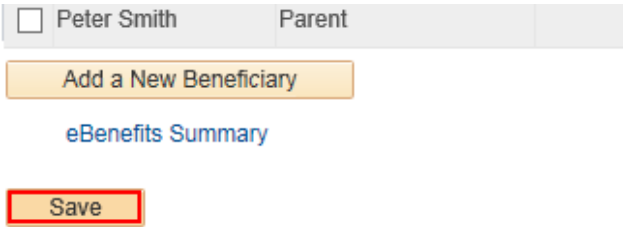
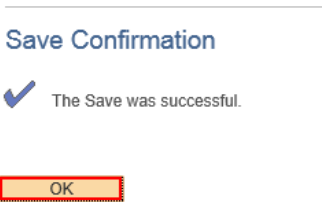


Step	Action															
10.	<p>The Basic Life page displays.</p> <p>Your current allocations display in the Covered Beneficiaries section.</p> <p>Currently, you have allocated 33% to your wife and 67% to your child as a primary allocation. You have not made any secondary allocations.</p> <p>You will change your allocations. You will allocate 25% to your wife and 75% to your child as a primary allocation. You will also allocate 100% to your father as a secondary allocation.</p> <p>Primary and secondary allocations must each total to 100%.</p>															
11.	<p>Click the Edit button.</p> <div><div>Covered Beneficiaries</div><p>Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.</p><div>Dep/Ben Coverage Details</div><table><tr><th>Name</th><th>Relationship to Employee</th><th>Primary Allocation</th><th>Secondary Allocation</th></tr><tr><td>Smith, Mary</td><td>Spouse</td><td>33%</td><td></td></tr><tr><td>Smith, Michael</td><td>Child</td><td>67%</td><td></td></tr></table><div>Edit</div></div>	Name	Relationship to Employee	Primary Allocation	Secondary Allocation	Smith, Mary	Spouse	33%		Smith, Michael	Child	67%				
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12.	<p>The Change Current Beneficiaries and Allocations page displays.</p> <p>The Allocations Details section list my current beneficiaries and the allocations assigned them. Currently your wife and child are assigned primary allocations. Your father is assigned no allocations.</p> <p>You will adjust the Primary allocations to allocate 25% to your wife and 75% to your child.</p>															
13.	<p>Click in the New Primary Allocation field.</p> <div><table><tr><th>Current Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><div></div></td><td><div></div></td></tr><tr><td></td><td><div></div></td><td><div></div></td></tr><tr><td></td><td><div></div></td><td><div></div></td></tr><tr><td>Totals</td><td>0</td><td>0</td></tr></table></div>	Current Secondary Percent	New Primary Allocation	New Secondary Allocation		<div></div>	<div></div>		<div></div>	<div></div>		<div></div>	<div></div>	Totals	0	0
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14.	<p>Enter the desired information into the New Primary Allocation field. Enter a valid value e.g. "25".</p> <div><table><tr><th>Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><div></div></td><td><div></div></td></tr><tr><td></td><td><div></div></td><td><div></div></td></tr><tr><td></td><td><div></div></td><td><div></div></td></tr><tr><td></td><td>0</td><td>0</td></tr></table></div>	Secondary Percent	New Primary Allocation	New Secondary Allocation		<div></div>	<div></div>		<div></div>	<div></div>		<div></div>	<div></div>		0	0
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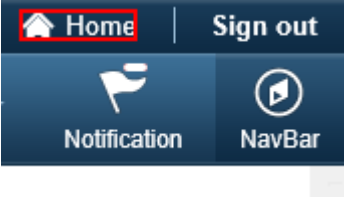


Step	Action
15.	<p>Click in the New Primary Allocation field.</p> 
16.	<p>Enter the desired information into the New Primary Allocation field. Enter a valid value e.g. "75".</p> 
17.	<p>Now you will enter 100 in the New Secondary Allocation field for your father.</p>
18.	<p>Click in the New Secondary Allocation field.</p> 
19.	<p>Enter the desired information into the New Secondary Allocation field. Enter a valid value e.g. "100".</p> 



Step	Action
20.	<p>You'll click the Update Totals button to confirm that the primary and secondary allocations each total to 100%.</p> <p>Click the Update Totals button.</p>  <p>The screenshot shows a table with two columns for primary and secondary allocations. The primary column has values 33 and 67. The secondary column has values 25 and 75. A total row at the bottom shows 100% for both. Below the table is a red-bordered button labeled 'Update Totals'.</p>
21.	<p>Notice both primary and secondary allocations total 100. If you have allocate more than 100% the system will generate and error message. If you allocate less than 100% the system will generate an error message when you click the save button.</p> <p>In either case, the system will not allow you to save your changes, if you have not allocated exactly 100%. You do not have to create secondary allocations. You must create primary allocations.</p>
22.	<p>You cannot create primary and secondary allocations for the same beneficiary. A beneficiary cannot be used for both a primary and a secondary allocation. The system generates an error message when you attempt to save your changes.</p> <p>If you receive an error message, click the OK button to close it and then make the necessary changes by adjust the new primary and secondary allocations.</p>
23.	<p>If you decide to cancel you changes without saving them, click the eBenefits Summary link. The system will navigate to the Benefits Summary page.</p> <p>For this example you will save your changes.</p>
24.	<p>Click the Save button.</p>  <p>The screenshot shows a list of beneficiaries with a checkbox next to 'Peter Smith' and the role 'Parent'. Below the list is an orange button labeled 'Add a New Beneficiary', a blue link labeled 'eBenefits Summary', and a red-bordered button labeled 'Save'.</p>
25.	<p>Click the OK button.</p>  <p>The screenshot shows a 'Save Confirmation' message with a checkmark icon and the text 'The Save was successful.' Below the message is a red-bordered button labeled 'OK'.</p>



Step	Action
26.	<p>Click the eBenefits Summary link.</p> 
27.	<p>Click the Home link.</p> 
28.	<p>End of Procedure.</p>