
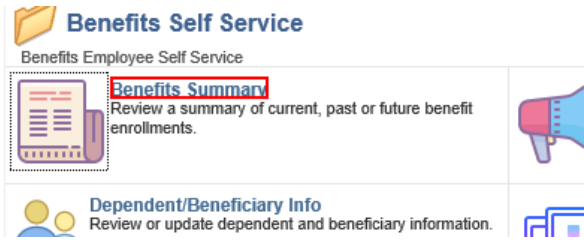




Removing a Beneficiary from an Allocation

Step	Action
1.	<p>Click the Benefits tile.</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>



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5.	<p>For example, your 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 -- 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 -- 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> <p>Allocations are associated with Life Insurance and Savings plans. You are currently enrolled in three plans with allocations: Basic Life, Section 457 and DC Special Benefit.</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>																		
8.	<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/HN</td> </tr> <tr> <td>Voluntary Vision Plan</td> <td>VSP Voluntary Vision Plan</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/HN	Voluntary Vision Plan	VSP Voluntary Vision Plan	Dental HMO		Basic Life	Basic Life 10000 ER	Spouse Life and AD & D		Child Life		Supplemental Life and AD & D	
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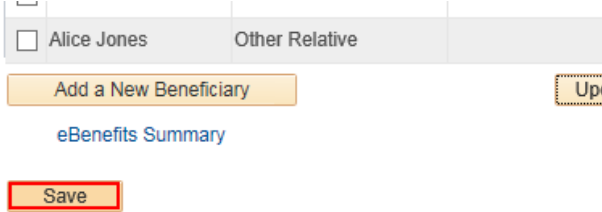
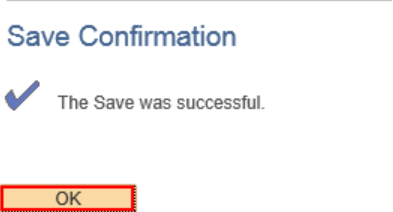
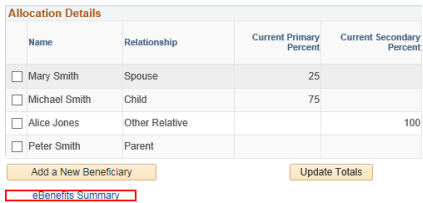


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9.	<p>The Basic Life page displays.</p> <p>Your current allocations display in the Covered Beneficiaries section.</p> <p>Currently, you have allocated 25% to your wife and 25% to your child as a primary allocation. You have also allocated 50% each to your father and mother-in-law as secondary allocations.</p> <p>You will change your allocations.</p> <p>You will leave your primary allocations unchanged. You will remove your father as a secondary allocation and change the allocation to your mother-in-law from 50% to 100% as a secondary allocation.</p>																		
10.	<p>Click the Edit button.</p> <table><tr><td>Smith,Mary</td><td>Spouse</td></tr><tr><td>Smith,Michael</td><td>Child</td></tr><tr><td>Smith,Peter</td><td>Parent</td></tr><tr><td>Jones,Alice</td><td>Other Relative</td></tr></table> <p>Edit</p>	Smith,Mary	Spouse	Smith,Michael	Child	Smith,Peter	Parent	Jones,Alice	Other Relative										
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11.	<p>The Change Current Beneficiaries and Allocation page Displays.</p> <p>The Allocations Details sections list your current beneficiaries and the allocations assigned them. Currently your wife and child are assigned primary allocations. Your father and mother-in-law are assigned as secondary allocations.</p> <p>You must enter values in the New Primary Allocation fields. You will enter the same values in these field as display in the Current Primary Allocation Percent field. You are not changing these allocations.</p> <p>You will change your secondary allocations to allocate 100% to your mother-in-law.</p>																		
12.	<p>Enter the desired information into the New Primary Allocation field. Enter a valid value e.g. "25".</p> <table><tr><th>Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>50</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>50</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>0</td><td></td><td>0</td></tr></table>	Secondary Percent	New Primary Allocation	New Secondary Allocation		<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	50	<input type="text"/>	<input type="text"/>	50	<input type="text"/>	<input type="text"/>	0		0
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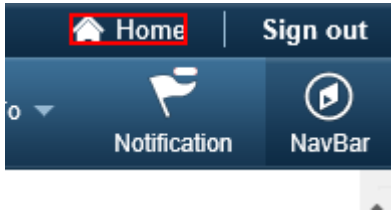


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17.	<p>Click the Update Totals button to confirm that the primary and secondary allocations each total to 100%.</p> <table><thead><tr><th>Current Primary Percent</th><th>Current Secondary Percent</th><th>New Primary Allocation</th><th>New Secondary Allocation</th></tr></thead><tbody><tr><td>25</td><td></td><td>25</td><td></td></tr><tr><td>75</td><td></td><td>75</td><td></td></tr><tr><td></td><td>50</td><td></td><td></td></tr><tr><td></td><td>50</td><td></td><td>100 x</td></tr><tr><td colspan="2">Update Totals</td><td>0</td><td>0</td></tr></tbody></table>	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation	25		25		75		75			50				50		100 x	Update Totals		0	0
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18.	<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. 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> <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> <p>If you decide to cancel you changes without saving them, click the eBenefits Summary link. The system will navigate the Benefits Summary page.</p> <p>For this example, you will save your changes.</p>
19.	<p>Click the Save button.</p> 
20.	<p>Click the OK button.</p> 
21.	<p>Click the eBenefits Summary link.</p> 



Step	Action
22.	<p>Click the Home link.</p>  A screenshot of a dark blue navigation bar. At the top left is a small white house icon followed by the word 'Home' in white. To its right is a vertical line and then the text 'Sign out' in white. Below 'Home' is a white flag icon and the word 'Notification' in white. To the right of the flag icon is a white circular icon with a square inside and the text 'NavBar' in white. A red rectangle highlights the 'Home' link. <p>End of Procedure.</p>
23.	