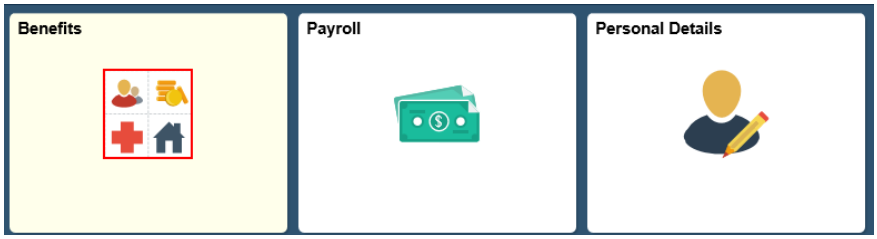
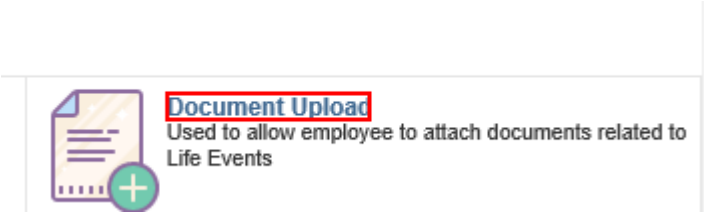
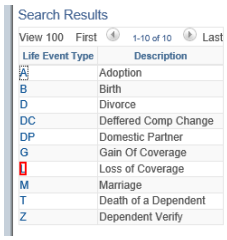
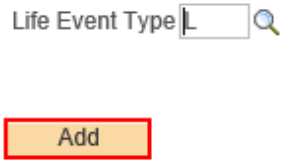
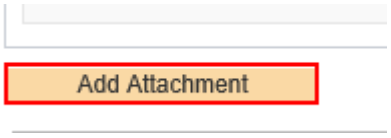
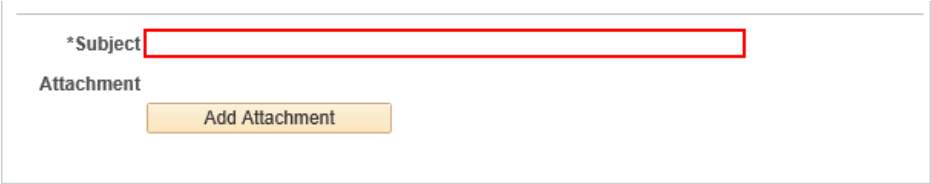
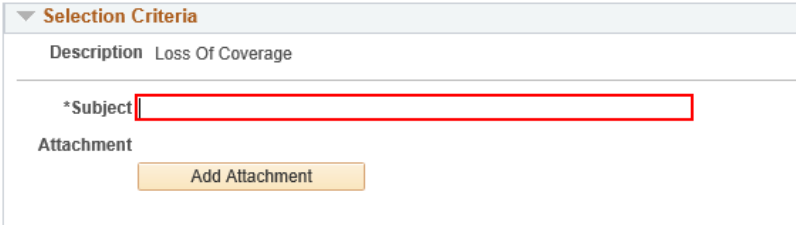
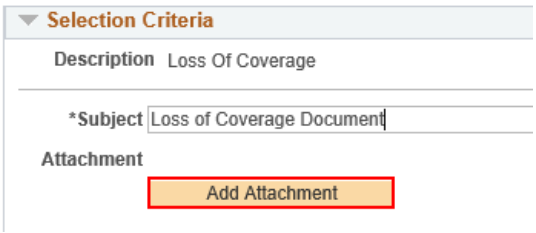
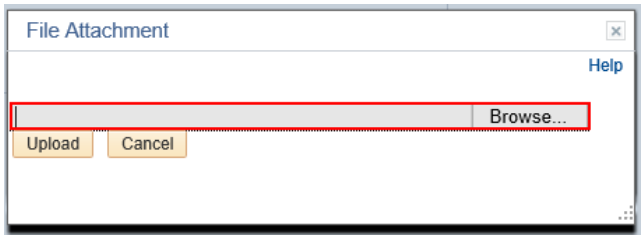
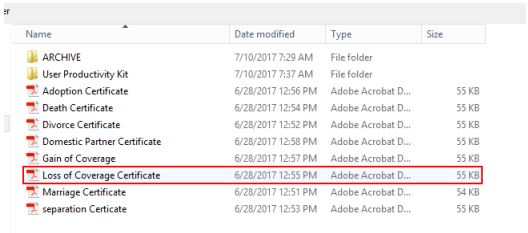
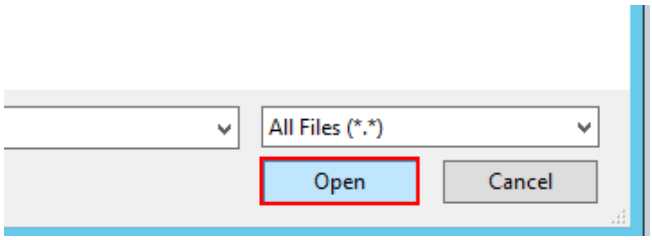
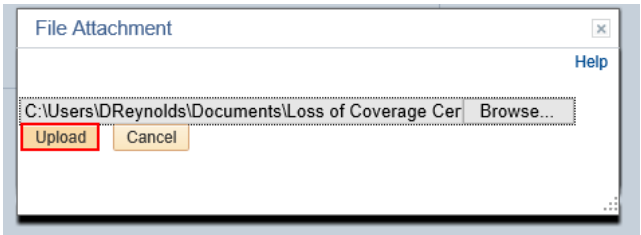
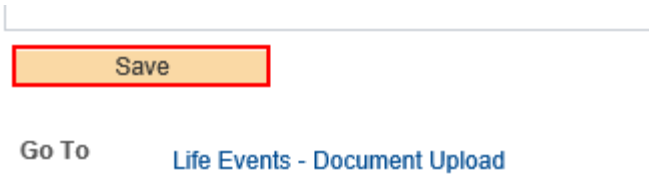
Uploading Documents

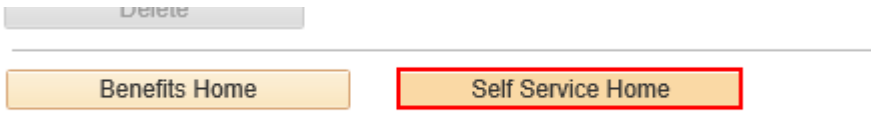
Step	Action
1.	Click the **Benefits** tile. 
2.	The Benefits Self Service page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid. This page contains the links that you use to review and manage your benefits information. 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 •Work with benefits forms and Plan Guides --Request a CVC Voucher Each of these links is covered in topics in Employee Self Service training. In this topic, you will use the Document Upload link.
3.	Click the **Document Upload** link. 

Step	Action
4.	The **Document Upload Add a New Value** page displays. There is one field on this page, the **Life Event Type** field. Each document that is uploaded must be associated with a life event. In this example, you will upload a document related to loss of coverage. You'll use the look up button to select **L** for Loss of Coverage.
5.	Click the **Look up Life Event Type** button.
6.	Click the **L** link. 
7.	Notice the **Life Event Type** field now displays L.
8.	Click the **Add** button. 
9.	The **Life Events – Document Upload** page displays. This page contains two sections—**Instructions** and **Life Event Documents**. If either of these sections is collapsed, You can use the expand/collapse section buttons at the left of the section header to expand these sections. The **Instructions** section offers instructions for how to upload documents. The **Life Event Documents** section lists the type/s of documents you are required to upload. In this example, you will upload a Loss of Coverage document, i.e. a document that supports a claim for lost insurance coverage elsewhere.

Step	Action
10.	Click the **Add Attachment** button. 
11.	The **Document Definition – New Attachment** page displays. There are two fields on this page. The **Description** field is presented in view only mode. You cannot change the value in this field. The **Subject** field is a required field. You must enter a value in this field. You can use this field to provide a brief description of the document you are uploading. In this case, you will enter Loss of Coverage Document in the **Subject** field.
12.	Click in the **Subject** field. 
13.	Enter the desired information into the **Subject** field. Enter a valid value e.g. "**Loss of Coverage Document**". 
14.	Click the **Add Attachment** button. 

Step	Action
15.	The **File Attachment** dialog box displays. Uploading a document is similar to adding an attachment to an email. You'll use the **Browse...** button to locate the document that you want to upload. This document could be located on your computer's hard drive, and external drive, or a network drive.
16.	Click in the **Browse...** button. 
17.	The **Choose File to Upload** window displays. You can use this window to locate the file you want to upload. In this example, you will select Loss of Coverage Certificate.
18.	Click the **Loss of Coverage Certificate** list item. 
19.	Click the **Open** button. 

Step	Action
20.	Notice the file you just selected appears in the field on the **File Attachment** page. You can click the **Upload** button to upload this file. If you change your and decide not to upload a document, you can click the **Cancel** button, The system will return you to the **Document Definition – New Attachment** page. From there you can use the **Main Menu**, the breadcrumbs menu, **Favorites**, the **Home** button, or the **NavBar** to navigate to other parts of PeopleSoft. If you decide that you have selected the wrong file, you can use the **Browse...** button to search for the correct file. In this example you have selected the correct file and you do want to upload it.
21.	Click the **Upload** button. 
22.	The **Document Definition – New Attachment** page displays. The **Attachment** field displays the file name/extension that you just uploaded. This field is view only. The **Subject** field displays the subject you previously entered. you can edit this if you want. For this example, you will not edit it. You can use the **View Attachment** button to view the document you just uploaded. Viewing uploaded documents is covered in another topic.
23.	Click the **Save** button. 

Step	Action
24.	The **Life Event – Document Upload** page displays. The **Attachments** section lists the attachment you just added. This section indicates the date/time when the attachment was created/uploaded, the author (you), the Entry ID (the type of life Event), the Subject (what you entered in the Subject field), and the Status. Notice the page also offers a **Delete** button and **Select All** and links. Deleting uploading attachments is covered in another topic.
25.	Click the **Self Service Home** button. 
26.	**End of Procedure.**