






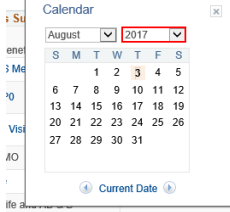
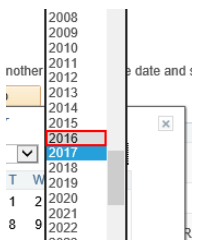
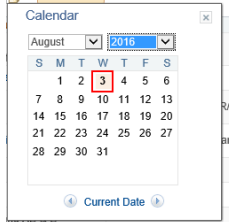

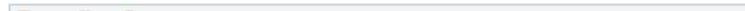

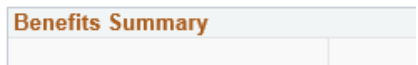
Using the Benefits Summary Page

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 benefits plan guides, benefits forms, and provider links-- Submit a request for a CVC Voucher <p>Each of these links is covered in topics in Employee Self Service training</p>
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>

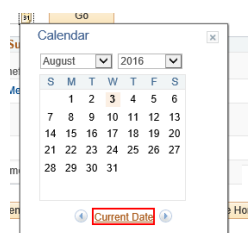




Step	Action
5.	<p>You are currently enrolled in</p> <ul style="list-style-type: none"> -- A Non-PERS Medical plan—Kaiser HMO Plan A with family coverage -- A Dental PPO plan—Delta Dental PPO w/KSR/HN with Family Coverage -- A Vision plan—VSP Voluntary Vision Plan with family coverage -- Basic Life—Basic Life 10000 ER plan in the amount of \$10,000 -- DC Special Benefit \$25/\$150 plan with a contribution of \$75 before taxes -- DC Special Benefit 425/\$50 DC 150 Spec Ben with a contribution of \$25 before taxes -- And in CCC PEPRRA 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 Spending Account -- Flex Spending Dependent Care -- And Health Saving Account or HSA
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 (in this example, 8/3/2017). You can view coverage for past dates as well as future dates.</p> <p>For this example, you want to see what your enrollments were last year.</p> <p>You'll use the Calendar icon to change the date to this day last year.</p>
8.	<p>Click the Choose a date button.</p> <p>Don Smith</p> <p>To view your benefits as of another date, enter the date and select Go.</p> <p>08/03/2017  Go</p> <p>Benefits Summary</p>

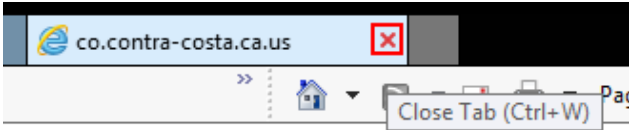
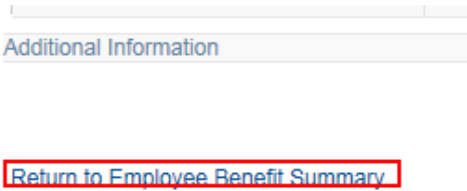


Step	Action
9.	<p>Click the Year list.</p> 
10.	<p>Click the 2016 list item.</p> 
11.	<p>Click the 3 date.</p> 
12.	<p>Click the Go button.</p> <p>Don Smith</p> <p>To view your benefits as of another date, enter the date and select Go.</p> <p>08/03/2016  Go</p> 
13.	<p>The Benefits Summary section now displays Your enrollment information for one year ago.</p> <p>To return to the current year, use the Calendar icon and click the Current Date link.</p>
14.	<p>Click the Choose a date button.</p> <p>Don Smith</p> <p>To view your benefits as of another date, enter</p> <p>08/03/2016  Go</p> <p>Benefits Summary</p> 



Step	Action																		
15.	<p>Click the Current Date link.</p> 																		
16.	<p>Click the Go button.</p> <p>Don Smith</p> <p>To view your benefits as of another date, enter the date and select Go.</p> <p>08/03/2017  Go</p> <hr/>																		
17.	<p>The Benefits Summary page now displays information for the current date.</p> <p>You can use the links in the Types of Benefit column to review details about each Benefit type. If the value in the Type of Benefit column is a link, you can use the link to view details about the benefit.</p> <p>You will start with the Non-PERS Medical.</p>																		
18.	<p>Click the NonPERS Medical link.</p> <p>To view your benefits as of another date, enter the date and select Go.</p> <p>08/03/2017  Go</p> <table><thead><tr><th colspan="3">Benefits Summary</th></tr><tr><th>Type of Benefit</th><th>Plan Description</th><th>Coverage or Participation</th></tr></thead><tbody><tr><td>NonPERS Medical</td><td>Kaiser HMO Plan A</td><td>Family</td></tr><tr><td>Dental PPO</td><td>Delta Dental PPO w/KSR/HN</td><td>Family</td></tr><tr><td>Voluntary Vision Plan</td><td>VSP Voluntary Vision Plan</td><td>Family</td></tr><tr><td>Dental HMO</td><td></td><td>Waived</td></tr></tbody></table>	Benefits Summary			Type of Benefit	Plan Description	Coverage or Participation	NonPERS Medical	Kaiser HMO Plan A	Family	Dental PPO	Delta Dental PPO w/KSR/HN	Family	Voluntary Vision Plan	VSP Voluntary Vision Plan	Family	Dental HMO		Waived
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19.	<p>The Non-PERS Medical page displays.</p> <p>To display information for a different date, You can change the date in the date field and click the Go button. For this example I will not change the date.</p> <p>This page provides information about the Plan Name, Plan Provider, Coverage elected, and Group Number if any.</p> <p>Note: the Plan Provider is a link. Clicking this link will display Information about this plan in a new browser tab.</p>																		



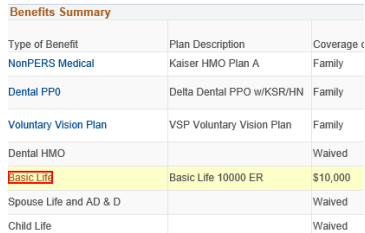


Step	Action
20.	<p>Click the KAISER link.</p> <p>NonPERS Medical Don Smith To view your benefits as of another date, enter the date and select Go. 08/03/2017 <input type="button" value="Go"/> NonPERS Medical Plan Name Kaiser HMO Plan A Plan Provider KAISER Coverage Employee + Two Dependents Group Number</p>
21.	<p>The plan information document displays.</p> <p>Close this tab.</p>
22.	<p>Click the Close Tab button.</p> 
23.	<p>The Covered Dependents section lists your dependents who are currently covered on this plan. The names in this table are links. Clicking these links will display the Dependent/Beneficiary Personal Information page. This page is covered another topic.</p> <p>Note, if additional information for this benefit were available, the Additional Information link would be active. In this case there is no additional information—the link is not active.</p> <p>To return to the Benefits Summary page, click the Return to Employee Benefit Summary link.</p>
24.	<p>Click the Return to Employee Benefits Summary link.</p> 
25.	<p>The Benefits Summary page displays.</p> <p>Next you will review details for Dental PPO.</p>

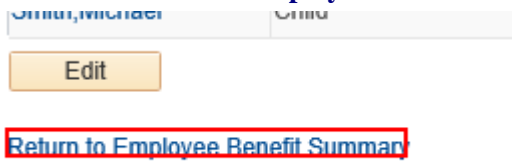
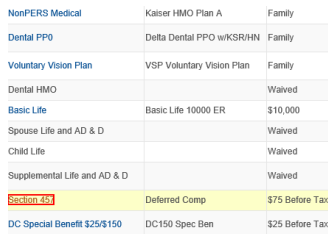


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26.	<p>Click the Dental PPO link.</p> <table><tr><th colspan="3">Benefits Summary</th></tr><tr><th>Type of Benefit</th><th>Plan Description</th><th>Coverage</th></tr><tr><td>NonPERS Medical</td><td>Kaiser HMO Plan A</td><td>Family</td></tr><tr><td>Dental PPO</td><td>Delta Dental PPO w/KSR/HN</td><td>Family</td></tr><tr><td>Voluntary Vision Plan</td><td>VSP Voluntary Vision Plan</td><td>Family</td></tr><tr><td>Dental HMO</td><td></td><td>Waived</td></tr><tr><td>Basic Life</td><td>Basic Life 10000 ER</td><td>\$10,000</td></tr></table>	Benefits Summary			Type of Benefit	Plan Description	Coverage	NonPERS Medical	Kaiser HMO Plan A	Family	Dental PPO	Delta Dental PPO w/KSR/HN	Family	Voluntary Vision Plan	VSP Voluntary Vision Plan	Family	Dental HMO		Waived	Basic Life	Basic Life 10000 ER	\$10,000			
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Dental HMO		Waived																							
Basic Life	Basic Life 10000 ER	\$10,000																							
27.	<p>The Dental PPO page displays. To display information for a different date, you can change the date in the date field and click the Go button. For this example, you will not change the date.</p> <p>This page provides information about the Plan Name, Plan Provider, Coverage elected, and Group Number if any.</p> <p>The Covered Dependents section lists your dependents that are currently covered on this plan. The names in this table are links. Clicking these links will display the Dependent/Beneficiary Personal Information page in view only mode. This page is covered another topic.</p> <p>Note, if additional information for this benefit were available, the Additional Information link would be active. In this case there is no additional information—the link is not active.</p> <p>To return to the Benefits Summary page click the Return to Employee Benefit Summary link.</p>																								
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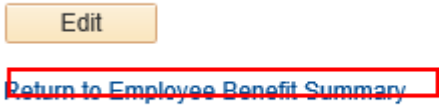
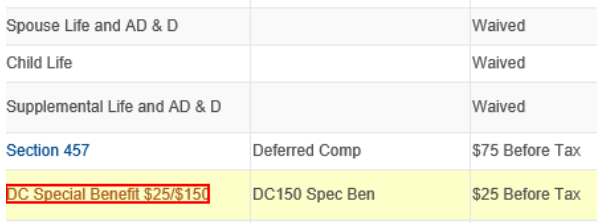



Step	Action
31.	<p>The Voluntary Vision Plan page displays. To display information for a different date, you can change the date in the date field and click the Go button. For this example you will not change the date.</p> <p>This page provides information about the Plan Name, Plan Provider, Coverage elected, and Group Number if any.</p> <p>The Covered Dependents section list all dependents currently covered under this plan.</p> <p>Note, if additional information for this benefit were available, the Additional Information link would be active. In this case there is no additional information—the link is not active.</p> <p>To return to the Benefits Summary page, click the Return to Employee Benefit Summary link.</p>
32.	<p>Click the Return to Employee Benefits Summary link.</p>  
33.	<p>The Benefits Summary page displays.</p> <p>Next you will review details for Basic Life.</p>
34.	<p>Click the Basic Life link.</p> 
35.	<p>The Basic Life page displays. To display information for a different date, You can change the date in the date field and click the Go button. For this example you will not change the date.</p> <p>This page provides information about the Plan Name, Plan Provider, Coverage level, and Group Number if any.</p>



Step	Action
36.	<p>This page displays information about your beneficiaries/dependents associated with your basic life coverage and how benefits are currently allocated. You can use this page to review/edit details about my current beneficiaries. You can also use this page to add a beneficiary and/or change your allocations.</p> <p>Working with beneficiaries/dependents and allocations are covered in other topics in eBenefits training.</p> <p>To return to the Benefits Summary page, click the Return to Employee Benefit Summary link.</p>
37.	<p>Click the Return to Employee Benefits Summary link.</p> 
38.	<p>The Benefits Summary page displays.</p> <p>Next you will review details for Section 457.</p>
39.	<p>Click the Section 457 link.</p> 
40.	<p>The Section 457 page displays. To display information for a different date, you can change the date in the date field and click the Go button. For this example you will not change the date.</p> <p>This page provides information about the Plan Name, Plan Provider and Group Number if any. It also provides information about current contributions.</p>
41.	<p>This page allows you to view your current contribution and allocations. You can also use this page to edit your allocations. Editing contributions is done as a life event, not from Benefits Summary.</p> <p>Editing current contributions and Allocations are covered in other topics. You cannot edit past or future contributions.</p> <p>To return to the Benefits Summary page, click the Return to Employee Benefit Summary link.</p>



Step	Action
42.	<p>Click the Return to Employee Benefits Summary link.</p> 
43.	<p>The Benefits Summary Page displays</p> <p>Next, you will review DC Special Benefit \$25/\$150.</p>
44.	<p>Click the DC Special Benefit \$25/\$150 link.</p> 
45.	<p>The DC Special Benefit \$25/\$150 page displays. To display information for a different date, You can change the date in the date field and click the Go button. For this example You will not change the date.</p> <p>This page provides information about the Plan Name, Plan Provider and Group Number if any. It also provides information about current contributions.</p>
46.	<p>This page allows you to view your current contribution and allocations. You can also use this page to edit your allocations. Editing contributions is done as a life event, not from Benefits Summary.</p> <p>Editing current contributions and Allocations are covered in other topics. You cannot edit past or future contributions.</p> <p>To return to the Benefits Summary page, click the Return to Employee Benefit Summary link.</p>
47.	<p>Click the Return to Employee Benefits Summary link.</p> 
48.	<p>Click the scrollbar.</p>



Step	Action
49.	<p>Click the Self Service Home button.</p>  <p>The screenshot shows a horizontal bar with two buttons. The button on the left is labeled 'Benefits Home' and the button on the right is labeled 'Self Service Home'. The 'Self Service Home' button is highlighted with a red border.</p>
50.	<p>End of Procedure.</p>