PeopleSoft Training
Employee Self-Service

eBenefits Key Points

Benefit Summary

- ✓ The Benefits Summary page can be accessed from the Employee Self-Service home page
- ✓ You can use this page to review your Benefits Summary information for the current date
- ✓ You can review benefits summary information for past dates
- ✓ You can review benefits for future dates
- ✓ The Benefits Summary page presents Benefits enrollment information in view only mode
- ✓ You cannot change benefits enrollments using the Benefits Summary pages
- ✓ You can view dependent/beneficiary coverage, modify dependent information or add a dependent/beneficiary but cannot use this page to enroll a dependent/ beneficiary in a medical, dental, or vision plan
- ✓ You can adjust allocations for life insurance and deferred compensation plans

Dependent/ Beneficiary Information

- ✓ Dependent and Beneficiary information can be reviewed using either the Benefits Summary pages or the Dependent/Beneficiary Info component
- ✓ You can access the Dependent/Beneficiary Coverage Summary from the Dependent/Beneficiary Info component
- ✓ You can edit phone and address information for your beneficiaries and dependents from both the Benefits Summary pages and the Dependent/ Beneficiary Info component. If the person is a spouse or domestic partner you can also edit the value in the Relationship to Employee field.
- ✓ The Same as mine check box is selected by default on the Dependent/Beneficiary Personal Information page; you can override this default selection
- ✓ You cannot change a dependent's name, date of birth, gender, Social Security Number, or Marital status
- ✓ If a dependent/beneficiary's name, date of birth, social security number, gender are incorrect, you must contact the benefits department to have the necessary changes made
- ✓ The system uses the Relationship to Employee field to determine if an individual is a dependent, a beneficiary or both.
- ✓ Dependents are eligible for coverage under medical, dental, and vision plans
- ✓ Dependents and Beneficiaries are eligible for coverage for life insurance and deferred compensation plans
- ✓ You can use the Benefits summary pages to add beneficiaries to your life insurance and deferred compensation coverages
- ✓ When you add a beneficiary, you should review and edit your allocations; allocations are covered in other portions of eBenefits training.

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Allocations

- ✓ Allocations determine how benefits from your life insurance and deferred compensation plans will be distributed to your beneficiaries
- ✓ You can use the Benefits Summary pages to review allocations, past, current, and future
- ✓ You can edit current allocations; you cannot edit past or future allocations.
- ✓ You must specify allocations separately for each life insurance and deferred compensation plan in which you are enrolled
- ✓ You can specify different allocations for each plan or use the same allocations for all plans
- ✓ Changes made to allocations on one plan do not update allocations on other plans; you must assign allocations to each plan individually
- ✓ All plans share the same list of dependents/beneficiaries
- ✓ All individuals listed in the Dependent/Beneficiary grids are beneficiaries and are eligible to receive allocations on life insurance and deferred compensation plans
- ✓ Only individuals listed in the Dependent/Beneficiary grid who are also dependents are eligible to be covered through medical, dental, and vision plans
- ✓ An individual's relationship to you determines if that individual is a dependent and beneficiary or only a beneficiary. The system automatically makes that determination.
- ✓ The Edit button for covered beneficiaries allows you to edit allocations and/or add new beneficiaries
- ✓ If you add a new beneficiary, you should review and/or adjust your current allocations for all plans to make sure they reflect the new beneficiary
- ✓ You can add a beneficiary without assigning allocations to the new beneficiary
- ✓ You can specify Primary Allocations and Secondary Allocations
- ✓ Primary Allocations are made directly to the beneficiary
- ✓ A secondary allocation is a contingent allocation—it will be made to the beneficiary only if a primary beneficiary is deceased
- ✓ You do not have to specify secondary allocations
- ✓ Allocations are made based on a percentage of coverage, not flat dollar amounts
- ✓ If you have multiple Beneficiaries listed, you can allocate the total of your benefits for a plan to a single beneficiary or split up the allocation among two or more beneficiaries
- ✓ You must allocate 100% of your total benefit

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Enrollment

- ✓ Enrollment is available during open enrollment periods, at the time of hire or rehire, and/or part of a qualifying life event.
- ✓ Benefit enrollment is for a full year; mid year changes to enrollment are not possible unless you have experienced a qualifying life event
- ✓ You must re-enroll in the Health Care Spending Account and Dependent Care Assistance Program each year
- ✓ You do not have to re-enroll in medical, dental, vision, and life insurance plans during open enrollment if you do not want to make changes to your elections; coverage will continue based on existing enrollments. You will be presented with benefits plans for which you are eligible
- ✓ Eligibility is determined by sets of eligibility rules based on your age, benefit status, employee type, employee class, pay group, salary grade, service months, standard hours, union code, etc.
- ✓ Enrollment criteria can vary by plan, for example only children can be enrolled in a child life plan
- ✓ Review your beneficiary and dependent information to make sure it is correct/up-to-date
- ✓ You must assign at least one beneficiary to life insurance plans and deferred compensation plans you have enrolled in; the system validates that these plans have at least one beneficiary assigned to each plan you have selected
- ✓ Allocations for insurance plans and deferred compensation plans can only be a percentage, not a dollar amount
- ✓ You can enroll in only one dental plan; the dental plan available to you is determined by the Medical Plan you have selected
- ✓ You cannot waive enrollment in the Basic Life plan as part of Online enrollment
- ✓ Contributions to deferred compensation plans must be specified by a flat dollar amount; you cannot specify a percentage of your compensation as your contribution to deferred compensation programs
- ✓ The enrollment pages displays the Employer Cost, the amount contributed by the County
- ✓ You can specify Primary and Secondary allocations; each must total to 100% of your total benefit
- ✓ A beneficiary cannot be both a primary and a secondary beneficiary.
- ✓ The system will not allow you to allocate more that 100% of your total benefit
- ✓ You must click the Submit button to complete your enrollment. If you do not click this button the changes you made will not go into effect.

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Life Events

- ✓ The system provides a guided process that leads you through the steps necessary to complete updates to enrollment based on qualifying life events
- ✓ The left side panel of the life event pages contains an activity guide that lists all steps necessary to complete the life event
- ✓ The activity guide provides visual indications of the status of each action in the life event process
- ✓ The life event pages provide buttons that you use to navigate through the steps in the life event process as well as buttons you can use to pause the process or to cancel the process.
- ✓ A qualifying life event is an event that changes your eligibility for benefits enrollments
- ✓ Most Life events must be processed within 31 days of the date of a qualifying life event;
- ✓ Deferred Compensation Contribution Changes must be must be completed by the end of the current month in order for the change to be processed to be reflected in the next 10th of month pay
- ✓ Life events processing provides opportunities to review and update your benefits enrollments
- ✓ Most life events require uploading supporting documentation
- ✓ You can pause processing a life event and come back at other time to complete processing
- ✓ You can cancel a life event before completing all steps
- ✓ You can only process one life event at a time. You cannot start a second life event until you either cancel the original event or complete the original event
- ✓ Some life events may require changes to personal information (name, address, contract information, emergency contacts) and/or payroll information (direct deposits, tax withholding); these changes must be completed in ePay or eBenefits. The transactions used to update personal and payroll information are covered in the ePay and eProfile portions of employee self service training.

Document Upload

- ✓ You can upload documents using the upload component
- ✓ You can also upload supporting documents as part of a life event
- ✓ You must associate a document with a qualifying life event type
- ✓ Uploading documents is similar to adding an attachment to an email
- ✓ You can upload multiple documents
- ✓ Each document must be provided a subject
- ✓ You can upload pdfs, word docs, jpg, and other common file types
- ✓ You can view uploaded documents that have not been deleted
- ✓ Deleted documents are listed the attachments grid on the Life Events—Document Upload page
- ✓ You can delete a previously uploaded document