



# Contra Costa County PeopleSoft Training

## Employee Self Service

### Quick Reference Guide

### Editing a Beneficiary

1. Click the **Benefits** tile on the **Employee Self Service** home page.
2. Click the **Benefits Summary** link on the **Benefits Self Service** page.
3. Click a link for a life insurance or deferred compensation plan in the **Benefits Summary** table
4. Click on the **Name** of the beneficiary in the **Dep/Ben Coverage** grid
5. Click the **Edit** button on the **Dependent/Beneficiary Personal Information** page
6. Edit information about the beneficiary
7. Click the **Save** button.

### Note

You can edit address and phone information for all dependents/beneficiaries. If the value in the **Relationship to Employee** field is Spouse or Domestic Partner, you can also edit the value in this field. For all others this field is display only. You cannot edit the value in it.

The screenshot illustrates the Oracle Employee Self Service interface with several steps highlighted by red boxes and numbers:

- Step 1:** The **Benefits** tile on the **Employee Self Service** home page.
- Step 2:** The **Benefits Summary** link on the **Benefits Self Service** page.
- Step 3:** A link for a life insurance or deferred compensation plan in the **Benefits Summary** table.
- Step 4:** The **Name** of the beneficiary in the **Dep/Ben Coverage** grid.
- Step 5:** The **Edit** button on the **Dependent/Beneficiary Personal Information** page.
- Step 6:** The **Personal Information** section of the **Dependent/Beneficiary Personal Information** page, which includes fields for First Name, Middle Name, Last Name, Name Prefix, Name Suffix, Date of Birth, Gender, First National ID, and Relationship to Employee.

The **Dependent/Beneficiary Personal Information** page also includes a **Save** button at the bottom, which is highlighted by a red box and the number 5.



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#### Dependent/ Beneficiary Info

1. Click the **Dependent/Beneficiary Info** link
2. Click on a name in the **Dependent and Beneficiary Information** grid
3. Click the **Edit** button
4. Edit information on the **Dependent/Beneficiary Personal Information** page
5. Click the **Save** button
6. Click **OK** on the Confirmation page

#### Life Event

1. Click on a name in the **Dependent and Beneficiary Information** grid on the **Add/Review Dependent/Beneficiary** page
2. Click the **Edit** button
3. Edit information on the **Dependent/Beneficiary Personal Information** page
4. Click the **Save** button
5. Click **OK** on the Confirmation page

#### Enrollment

1. Click on the **Add/Review Dependents** or the **Add/Review Beneficiaries** button
2. Click on a name in the **Dependent and Beneficiary Information** grid on the **Add/Review Dependent/Beneficiary** page
3. Click the **Edit** button
4. Edit information on the **Dependent/Beneficiary Personal Information** page
5. Click the **Save** button
6. Click **OK** on the **Confirmation** page