



Contra Costa County PeopleSoft Training

Employee Self Service

Quick Reference Guide

Editing Allocations

1. Click the **Benefits** tile on the **Employee Self Service** home page.
2. Click the **Personal 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 the **Edit** button on the plan details page.
5. Edit primary and secondary allocations in the **Allocations Details** section.
6. Click the **Save** Button.

Note

You must designate primary allocations. Secondary allocations are optional. Each must total to 100%.

A beneficiary cannot be both a primary and a secondary allocation.

You do not have to allocate to all beneficiaries.

Allocations are made separately/independently for each life insurance and deferred compensation plan in which you are enrolled.

The screenshot displays 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 Self Service** link on the Benefits Self Service page.
- Step 3:** The **Benefits Summary** table, specifically the **Basic Life** plan.
- Step 4:** The **Edit** button on the plan details page.
- Step 5:** The **Allocations Details** section, showing a table with columns for Name, Relationship, Current Primary Percent, Current Secondary Percent, New Primary Allocation, and New Secondary Allocation.
- Step 6:** The **Save** button at the bottom of the page.

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/> Mary Smith	Spouse	33			
<input type="checkbox"/> Michael Smith	Child	67			