PeopleSoft

PeopleSoft 9.2 Benefits
Life Event Management

Job Aid

1.0   Overall Business Process

eBenefits comprises self-service web transactions that interact with the PeopleSoft Human Resources (HR) system. Employees use eBenefits to review, add, and update their benefits information. eBenefits transactions include:

- ➢ Benefit event management.

- ➢ Document Upload

- ➢ Benefits Information

- ➢ Dependent and beneficiary information.

- ➢ Form 1095-C View/Consent

1.0.1   Navigation

Navigation to self-service Benefits folder

Step	Action
1.	Begin by navigating to the **Navigation Bar icon**. Click the **Navigation Bar** icon.
2.	Click on the **Navigator** icon
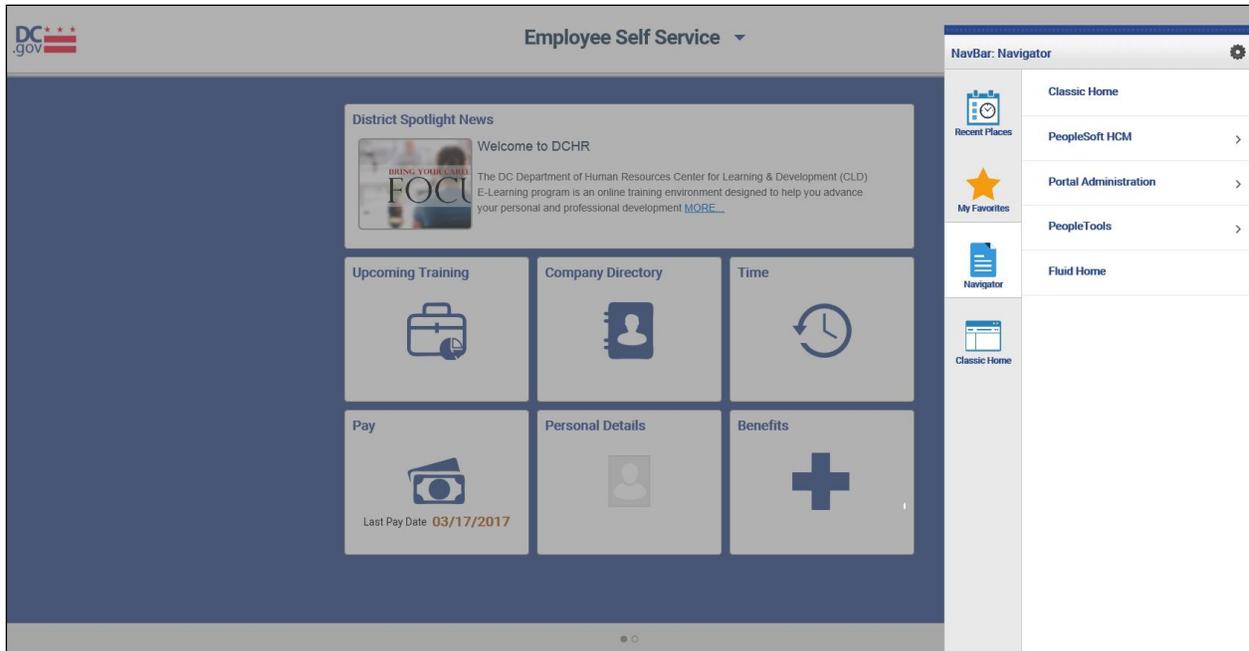
Step	Action
3.	Click the **PeopleSoft HCM** link. **PeopleSoft HCM** `>` The modules will display under the PeopleSoft HCM
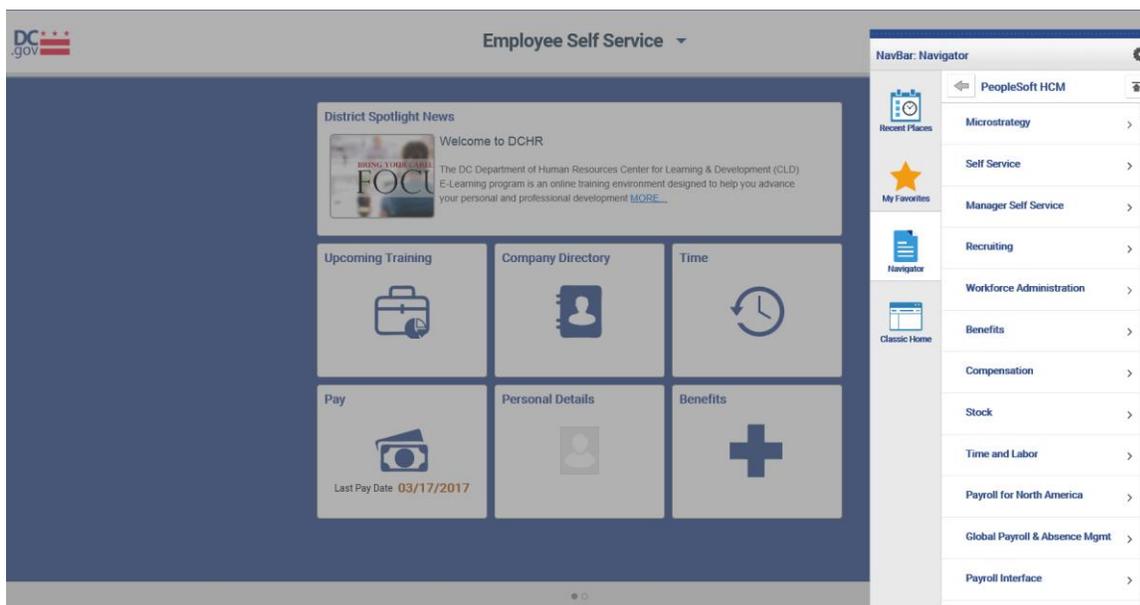
Step	Action
4.	Click on the **Self-Service** link. **Self Service** Self-service modules will display under Self-service
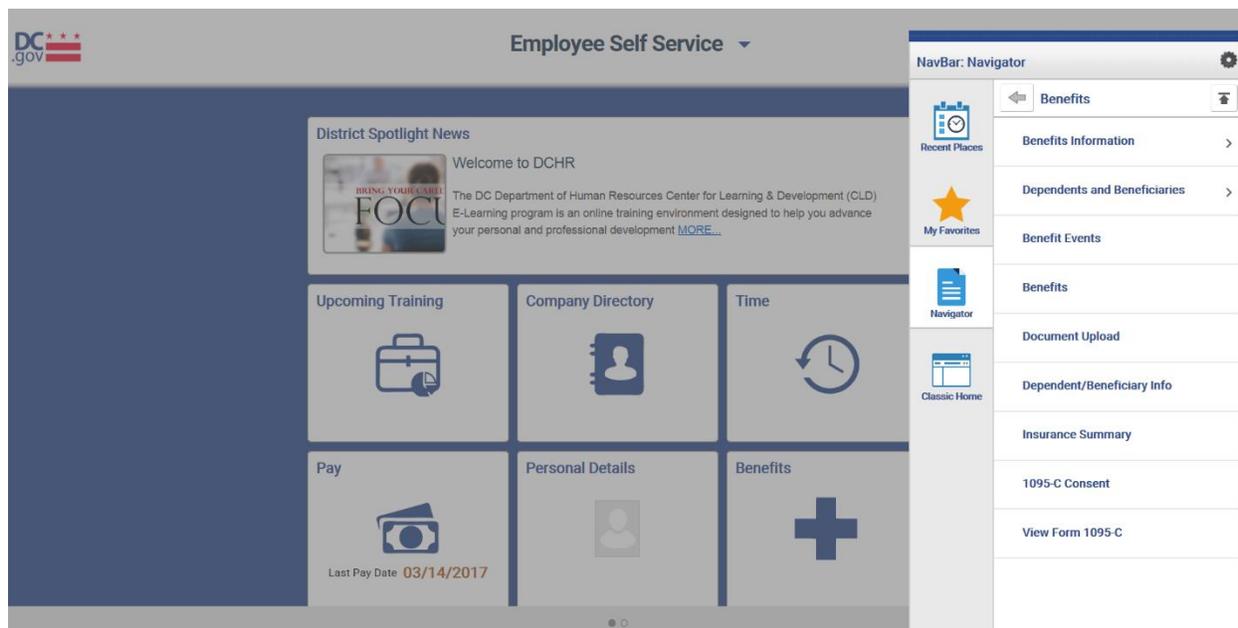
Step	Action
4.	Click on the **Benefits** link. **Benefits** Benefits Self-service pages will display under Benefits

1.1 Benefit event management

Benefit Event transactions can streamline the Benefit event process for employees by enabling them to update personal data and then change their benefit enrollments, all from one self-service transaction. Benefit events include:

- ➢ I got Married
- ➢ I had baby
- ➢ I adopted or gained legal custody/guardianship of a child

- ➢ I got divorced/legally separated
- ➢ I am hired
- ➢ Open Enrollment
- ➢ Commuter Benefits
- ➢ Qualifying Event for Domestic Partner
- ➢ 457 Enrollment
- ➢ Loss of Coverage

1.1.1 Process Steps for Employee

Benefit event 'I got married' is being used as an example, steps are similar for all events except for few required tasks. Document upload is not required step for the following events:

- ➢ I am hired
- ➢ Open Enrollment
- ➢ Commuter Benefits
- ➢ 457 Enrollment

1.1.1.1 Submit Benefit Event
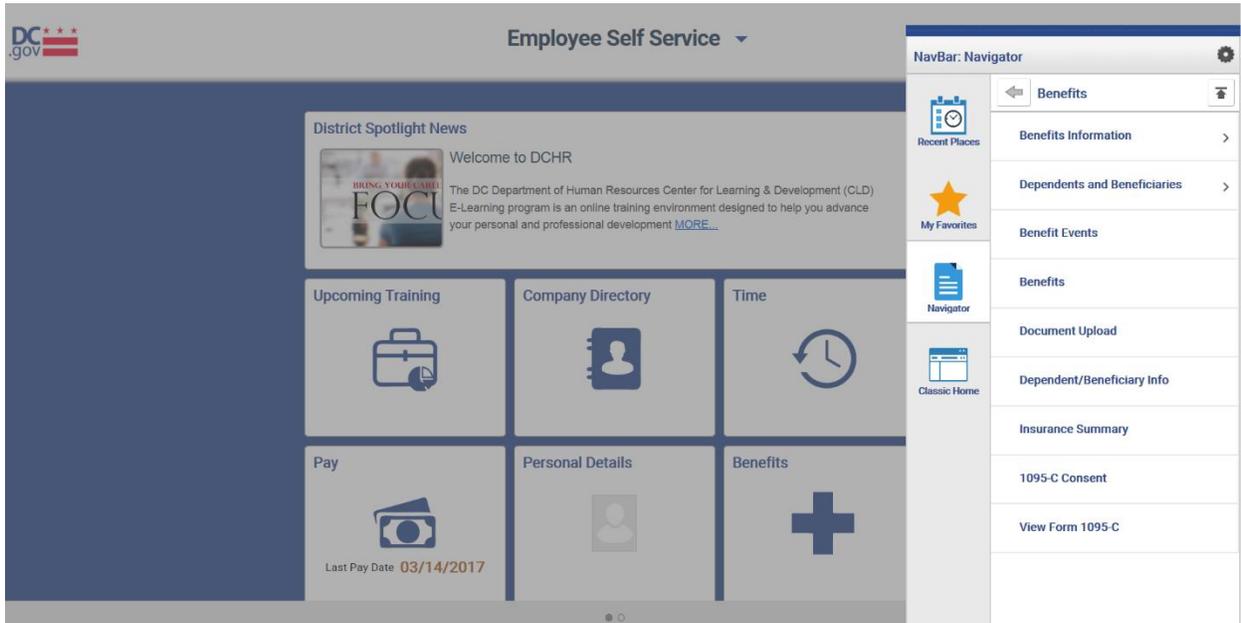
Benefit Events

Select Your Event

There are some events that involve you as the Employee or your family members.

Review the choices and select the appropriate Event. Then enter the date of your event.

Employee

- ☐ I got married
- ○ I had a baby
- ○ I adopted or gained legal custody/guardianship of a child
- ○ I got divorced/legally separated
- ○ I am Hired
- ○ Open Enrollment
- ○ Commuter Benefits
- ○ Qualifying Event for Domestic Partner
- ○ 457 Enrollment
- ○ Loss of Coverage

Step	Action
1.	Click on the **Benefit Events** link. **Benefit Events** Benefits events will display under this page
2.	Select 'I got married'

Benefit Events

Select Your Event

There are some events that involve you as the Employee or your family members.

Review the choices and select the appropriate Event. Then enter the date of your event.

Employee

- ⦿ I got married
- ◯ I had a baby
- ◯ I adopted or gained legal custody/guardianship of a child
- ◯ I got divorced/legally separated
- ◯ I am Hired
- ◯ Open Enrollment
- ◯ Commuter Benefits
- ◯ Qualifying Event for Domestic Partner
- ◯ 457 Enrollment
- ◯ Loss of Coverage

Change Status Date

Help

Enter the date of your status change, then select the OK button. The Benefit Event must be completed within 60 days of your qualifying event or you will not be eligible to change your Benefit Elections.

Status Change Date

*Date Change Will Take Effect 06/13/2017

OK   Cancel

Step	Action
3.	Enter effective date of the event ***Date Change Will Take Effect** ☐
4.	Click OK after entering the effective date OK
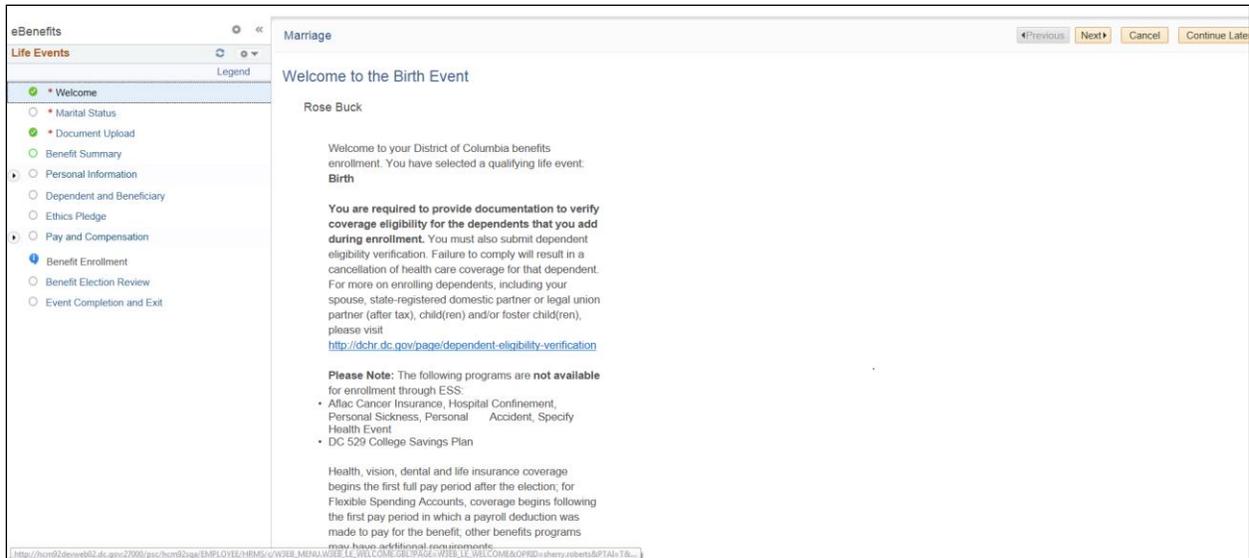
Step	Action
5.	Review instructions on Welcome page
6.	Click 'OK'
7.	Click 'Next'
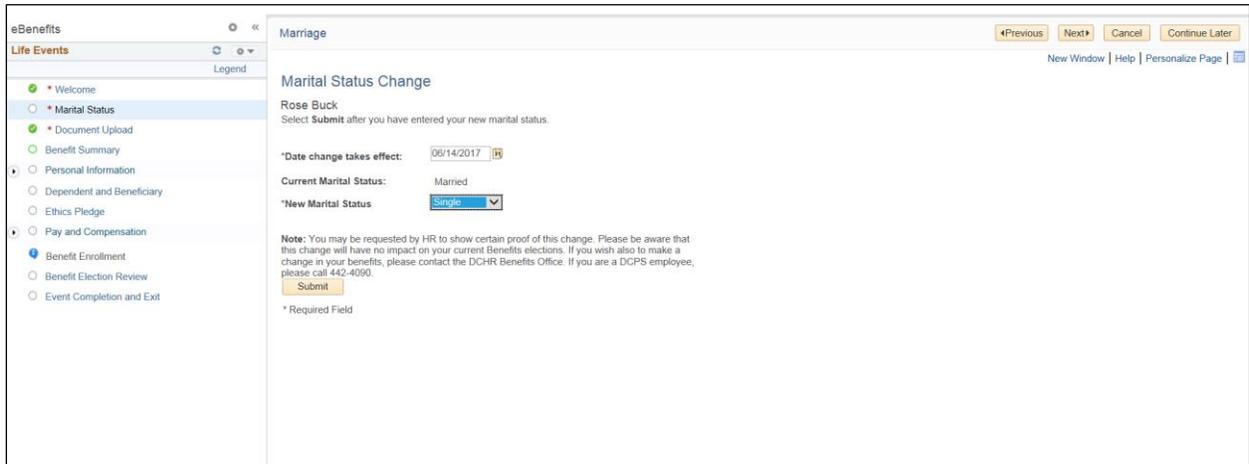
Step	Action
8.	Add 'New Marital Status' and Submit ***New Marital Status** `Married ▼`
9.	Click 'Submit' **Submit**
10.	Click 'Next' to go to the next page **Next ▶**
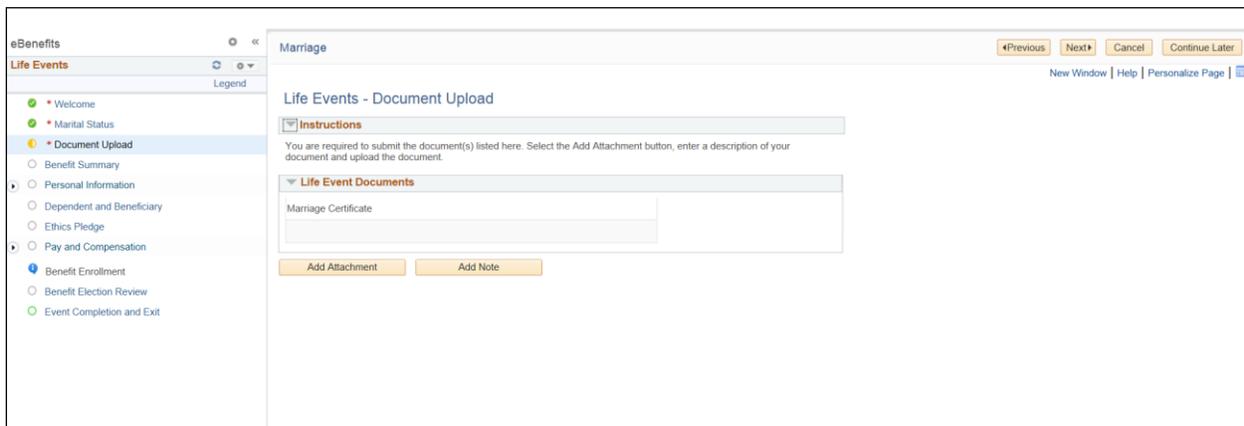
| Step	Action
11.	Add Click on Add Attachment **Add Attachment**
12.	Add subject ***Subject** [ ]
13.	Click on Add Attachment **Add Attachment**
14.	Click on choose File and browse to select supporting document that will be uploaded **Choose File**
15.	Click on Upload **Upload**
16.	Click on Save **Save**

Step	Action
17.	Message will display about the approval process, click 'OK'

Message

Approval is required. (3001,1094)

Proof is required for the attached document, and the document must be approved prior to your Benefits Enrollment changes are accepted. An email notification has been sent to the Benefits Administrator requesting approval.

OK

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eBenefits

Life Events — Legend

- ✓ * Welcome
- ✓ * Marital Status
- ✓ * Document Upload
- ○ Benefit Summary
- ○ Personal Information
- ○ Dependent and Beneficiary
- ○ Ethics Pledge
- ○ Pay and Compensation
- ○ Benefit Enrollment
- ○ Benefit Election Review
- ○ Event Completion and Exit

Marriage

◄Previous Next► Cancel Continue Later

Rose Buck

To view your benefits as of another date, enter the date and select Go.

06/14/2017 Go

Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
Employees Health Benefits	Aetna HMO-DC Before Tx	Self Only
Dental	Cigna Dental PPO	Self Only
Vision	No Vision	Self Only
Domestic Partner Dental		Waived
Domestic Partner Vision		Waived
Basic Life	(USF) FEGLI Basic	$ X Salary + $2000
Section 457	Deferred Compensation Plan	$300 Before Tax
Sick	PT sick leave	
Annual Leave	Partime Annual Leave	
Sick Leave Incentive	Sick Leave Incentive	
Voluntary Leave Program	Voluntary Leave Program	
Flex Spending Health - U.S.		Waived
Flex Spending Dependent Care		Waived
Health Savings Account		Waived
Transit FSA		Waived

Step	Action
18.	Click on 'Next' Next►
19.	Review Benefits Summary
20.	Click on 'Next' Next►

Step	Action
21.	To change name, use this page, enter the new name
22.	Click on Submit
23.	Click on 'Next' to move to the next page

Step	Action
24.	To change address, use this page, enter the new address
25.	Click on Edit Address

Step	Action
26.	Enter Address and click on 'OK' OK
27.	Click on Submit Submit
28.	Click on 'Next' Next▶

Step	Action
29.	Enter Phone number and click on 'Save'
30.	Click on 'Next'

Step	Action
31.	Review the Ethnic Group, to make changes navigate to personal details on Main page

Step	Action
32.	Click on 'Next'
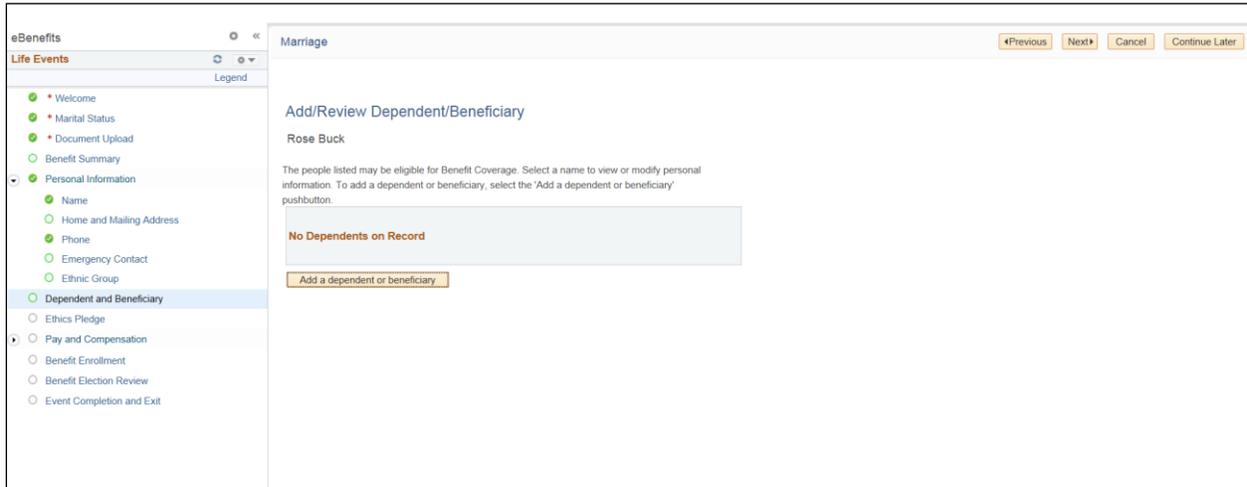
Step	Action
33.	Click on 'Add a dependent or Beneficiary' button to add new dependent
34.	Click on 'Next'

Step	Action
33.	Enter Dependent information and Click on 'Save'

Step	Action
34.	Click on 'OK' OK
35.	Click on 'Next' Next▶

Step	Action
35.	Select 'Agree' and click on 'Submit' button
36.	Click on 'Next'

| Step	Action
37.	Complete the W-4 form and click on 'Submit' **Submit**
38.	Verify your identity by entering password and click on 'OK' **OK**
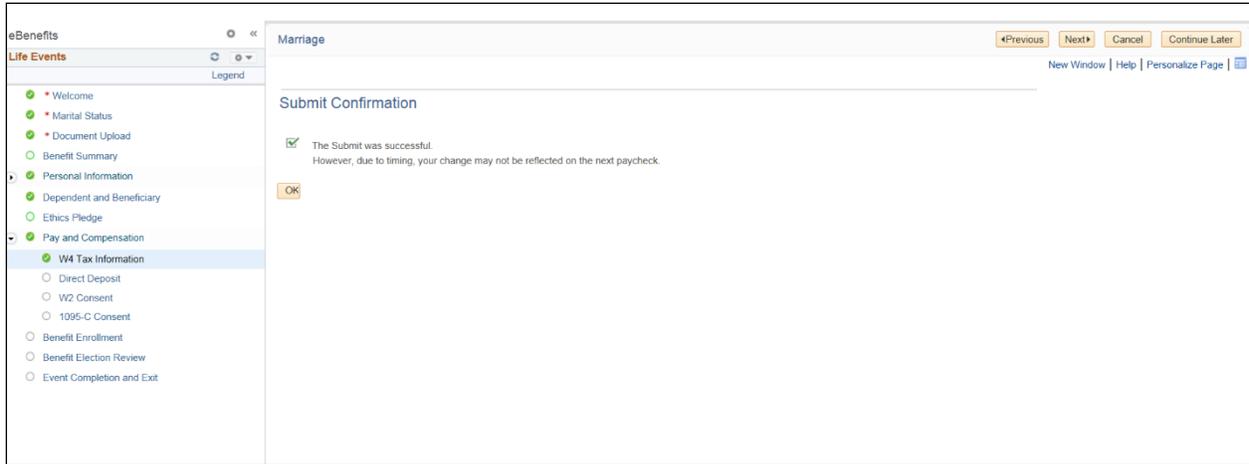
Step	Action
39.	Click on 'OK'
38.	Click on 'Next'
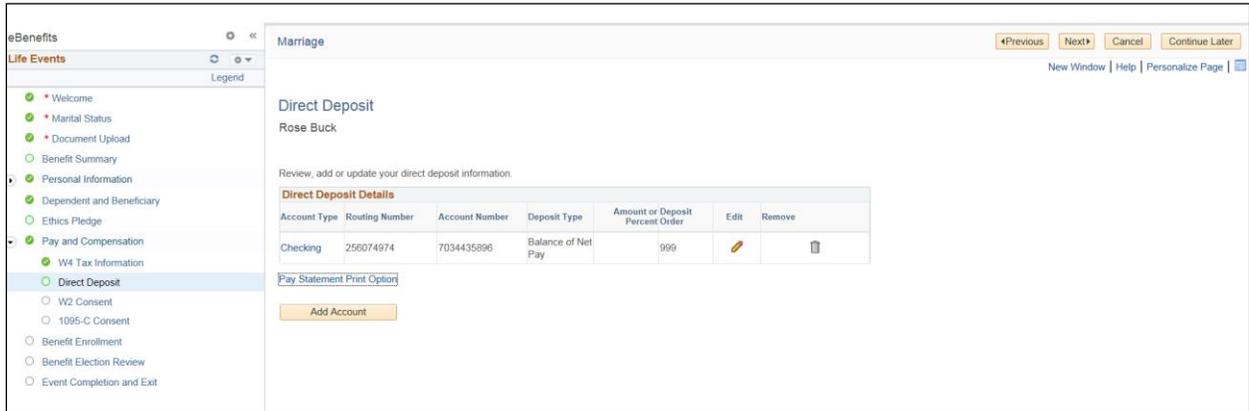
Step	Action
40.	Click on 'Add Account' to add a new account

Step	Action
41.	Enter Account details and click on 'Submit' Submit
42.	Click on 'Edit' to edit existing account ✏️
43.	Update the account details and click on 'Submit' Submit
44.	Click on 'OK' OK
45.	Click on 'Next' Next▶

| Step	Action
46.	Update Consent Status if needed ☐ Check here
47.	Click on 'Submit' Submit
48.	Verify your identity by entering your password and click on 'Continue' Continue

|	
49.	Click on 'Next' Next▶

50.	Check Consent check box ☐ I consent to receive Form 1095-C electronically
51.	Click on 'Submit' Submit
52.	Verify your identity by entering your password and click on 'Continue' Continue
53.	Click on 'Next' Next▶
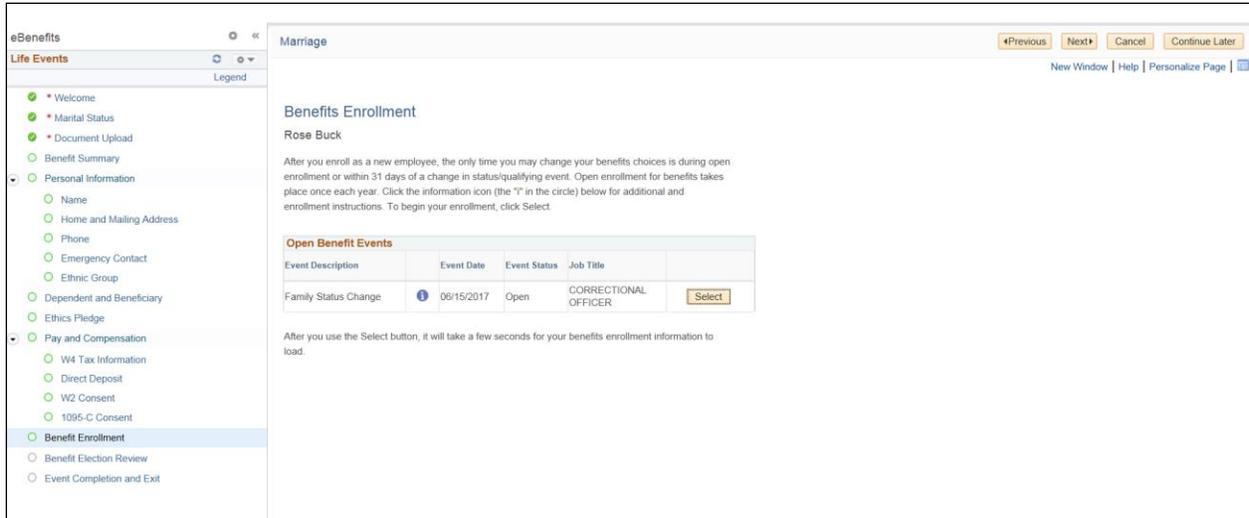
54.	Click on 'Select' to open enrollment window, if you would like to make changes to your enrollment. **Select**
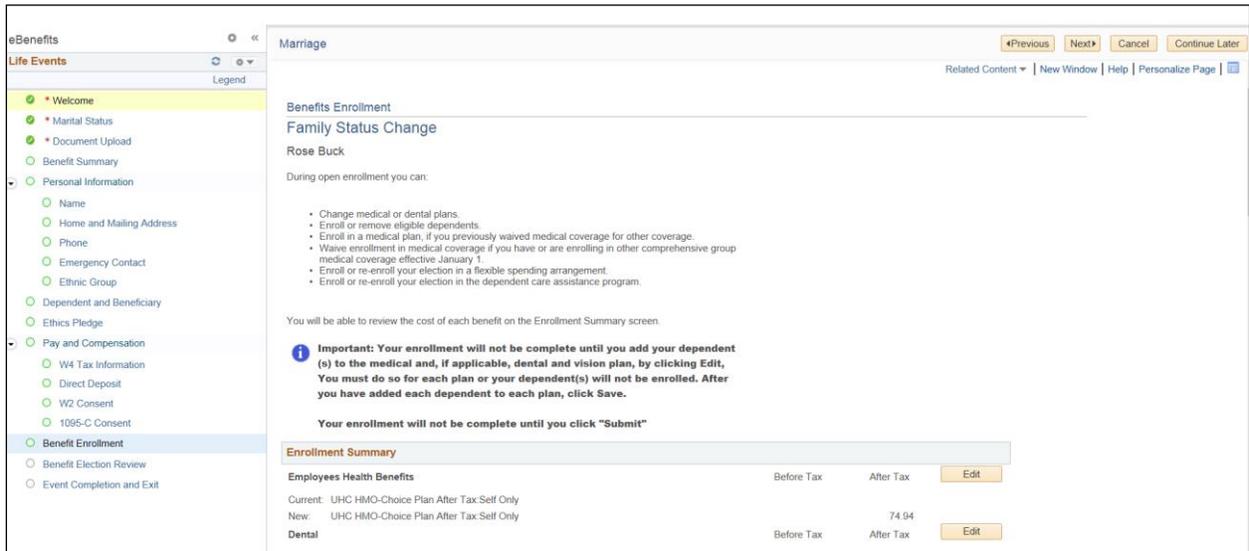
55.	Click on 'Edit' next to each plan that you would like to make enrollment changes to **Edit**
51.	Follow the instructions to complete enrollment changes and click on 'Submit' to Submit the changes **Submit**

52.	Verify your identity by entering your password and click on 'Continue'
	Continue

53.	Click on 'OK' to go to the enrollment main screen
	OK
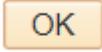
54.	Enrollment changes will be emailed to you for record, these changes are effective after the supporting documents are accepted.

55.	Click on 'Next'
	Next▶
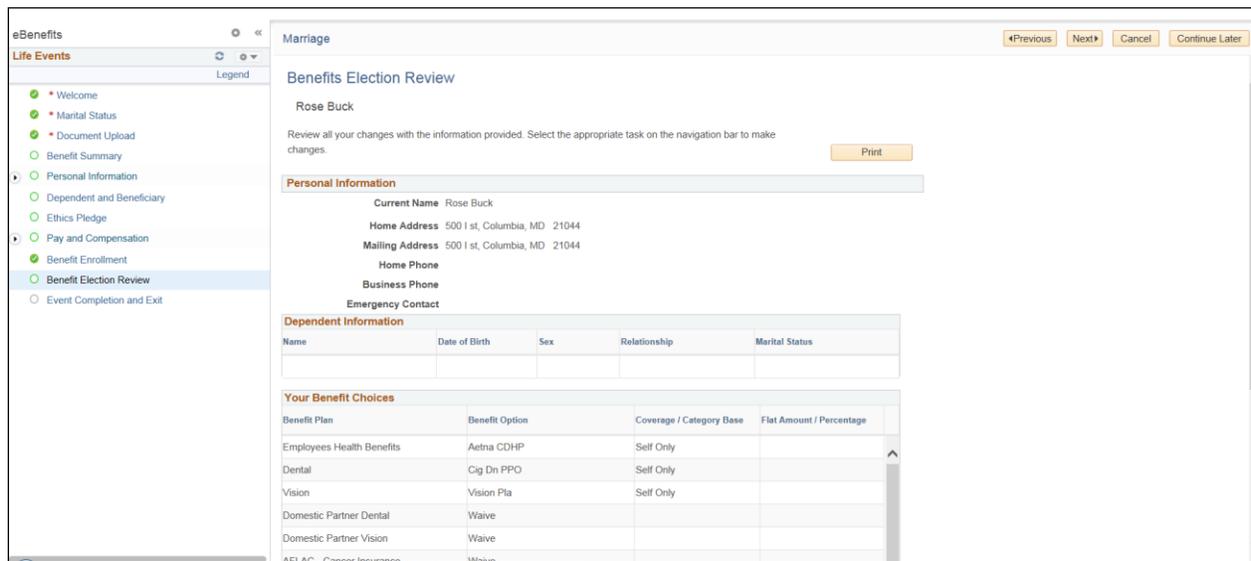
56.	Review the enrollments for each plan, you may also print a copy of it by click on 'Print'
	Print

Preliminary Enrollment Summary: Family Status Change

Rose Buck
Employee ID: 00008870   Effective Date: 06/15/2017

This statement summarizes your recent benefits elections. These coverages will be validated and you will receive a Confirmation Statement. If an error has been made in recording your elections, contact Human Resources. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Name	Rose Buck
Home Address	500 I st, Columbia, MD 21044
Mailing Address	500 I st, Columbia, MD 21044
Home Phone	
Business Phone	
Emergency Contact	

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57.	Print a copy or save the pdf copy generated
58.	Go back to the main window and click on 'Next'

59.	Click on 'Complete'

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60.	You will be routed back to the Benefit Event page; you will see that the marital status change event is 'In Progress' status ⊙ I got married ...(event in progress)
61.	You will receive and email when your supporting document is approved. Your enrollments will be accepted at that point.
62.	If your document is not sufficient to accept the enrollments, you will receive a document denial email, you can follow the steps below to re-submit the document.

1.1.1.2   Re-Submit Supporting Document

This message is to notify you that your document was denied: BN_MARRIAGE. To access the document attachment page, use the following link: http://hcm92devweb02.dc.gov:27000/psp/hcm92sqa/EMPLOYEE/HRMS/c/W3EB_MENU.W3EB_LE_WELCOME.GBL? CONTEXTIDPARAMS=TEMPLATE_ID:EF_M5LLLLL&CONTEXTIDPARAMS=OPRID:donald.holland. This is a system-generated email. Do not reply to this email.

|	
63.	Close all PeopleSoft windows and click on the link in the document denial email.
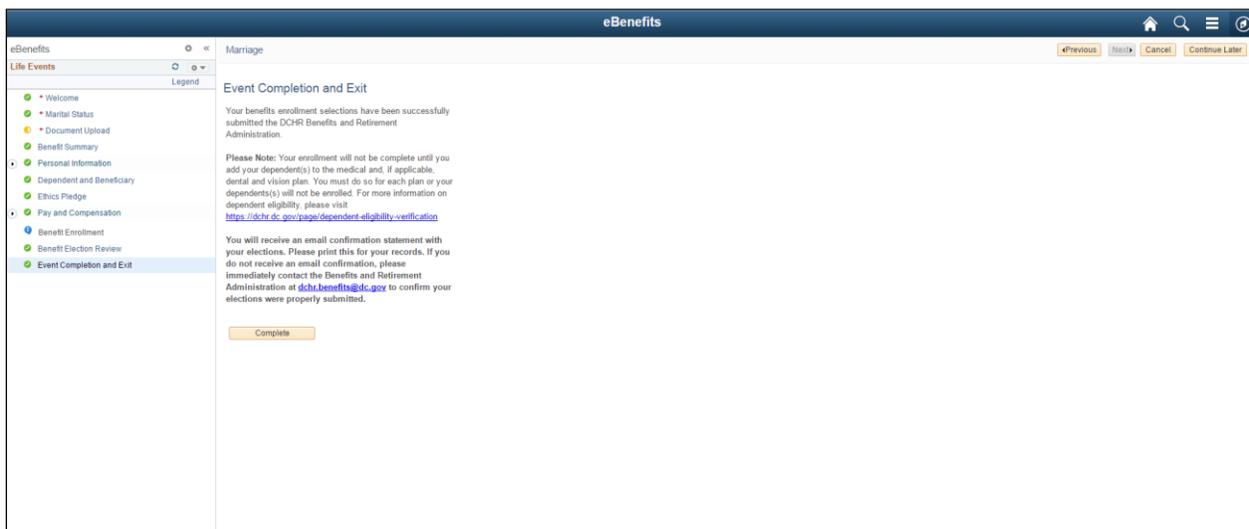
64.	You will be routed to the Event Completion and Exit page
65.	Click on 'Document Upload' left navigation link ● * Document Upload
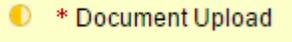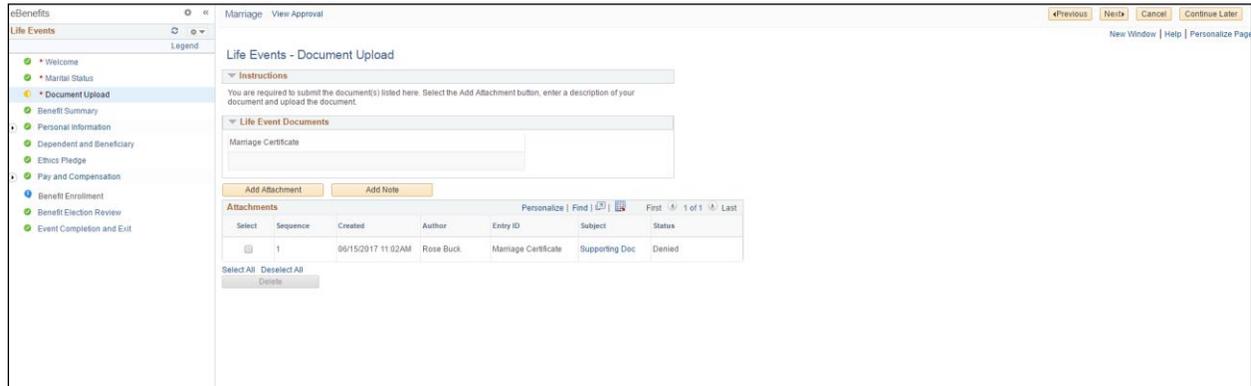
Step	Action
66.	Add Click on Add Attachment Add Attachment
67.	Add subject *Subject
68.	Click on Add Attachment Add Attachment
69.	Click on choose File and browse to select supporting document that will be uploaded Choose File
70.	Click on Upload Upload
71.	Click on Save Save
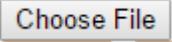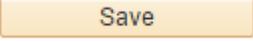
Step	Action
72.	Message will display about the approval process, click 'OK' **Message** Approval is required. (3001,1094) Proof is required for the attached document, and the document must be approved prior to your Benefits Enrollment changes are accepted. An email notification has been sent to the Benefits Administrator requesting approval. OK
73.	You will see that 'Document Upload' radio button is now turned to green, which means document upload is complete ✅ * Document Upload
74.	Click on 'Event Completion and Exit' left navigation link ✅ Event Completion and Exit
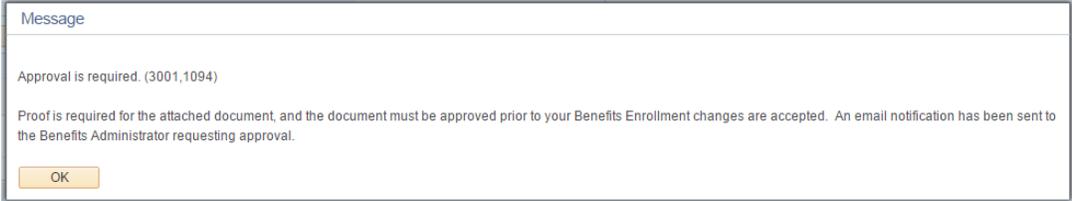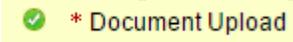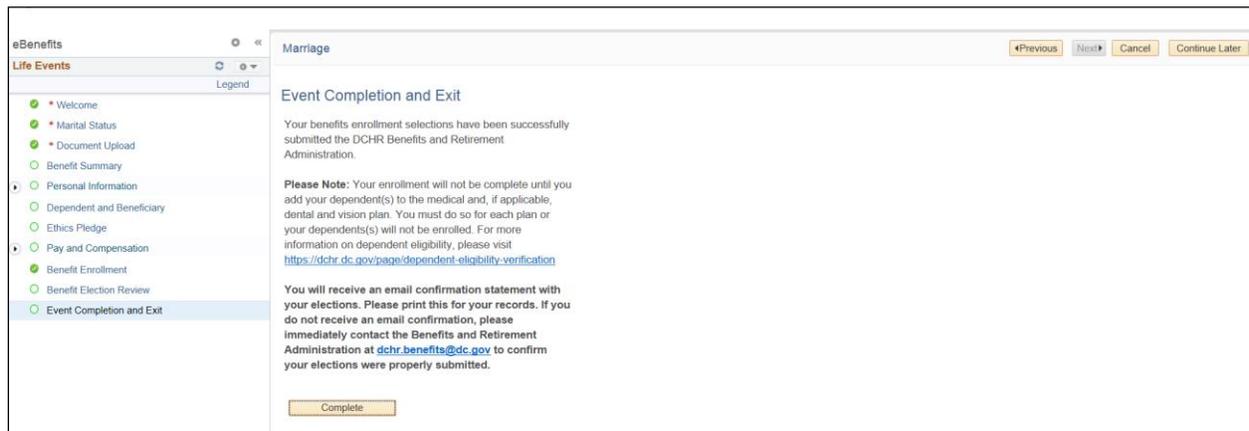
75.	Click on 'Complete' **Complete**
76.	You will receive and email when your supporting document is approved. Your enrollments will be accepted at that point.