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Enterprise eBenefits 9.0

PeopleSoft eBenefits comprises self-service Web transactions that interface with the PeopleSoft Human Resources system. Employees use eBenefits to review, add, and update their benefits information.

- **eBenefits Enrollment** pages enable you to communicate your benefit choices to your organization.
- **eBenefits Health** pages enable you to review your health related benefit information by navigating from summary level pages to more detailed information.
- **eBenefits Savings** pages enable you to review your savings plan information by navigating from summary level savings plan pages to more detailed information.
- **eBenefits Insurance** pages enable you to review life insurance information by navigating from summary level pages to more detailed information.
- **eBenefits Dependents/Beneficiaries** pages enable you to review information about your dependents and beneficiaries by navigating from summary level pages to more detailed information.
- **eBenefits Flexible Spending Accounts** pages enable you to review information about your health or medical spending account by navigating from summary level pages to more detailed information.
- **eBenefits Life Event** pages are designed for you to use to enter information about a birth or adoption of a child, or recent marriage.

Upon completion of this module, you will be able to:

- Describe integration, roles, and security.
- Enroll in benefits.
- Review benefit information.
- Review dependent and beneficiary information.
- Manage life events.

Using eBenefits

This lesson provides an overview of eBenefits and the enrollment process.

Upon completion of this lesson, you will be able to:

- Describe eBenefits integration, roles, and security.
- Enroll in benefits using the eBenefits pages.

Understanding Integration, Roles, and Security

This topic discusses eBenefits integration and how roles and security apply to self-service transactions.

Procedure
Step | Action
--- | ---
1. | PeopleSoft eBenefits integrates with other PeopleSoft applications as displayed below.
2. | Self-service transactions are targeted to specific roles, such as applicant, employee, faculty, manager, recruiter, and optionee.
   
   These roles help determine:
   • The transactions an employee can access.
   • The information an employee can view.
3. | User profiles determine default access to transactions. You create user profiles in the User Profile component. You assign a role to each user profile.
   
   User profiles also control the data each employee can access.
4. | Profiles are linked to permission lists. Each permission list identifies the pages that users can access. To modify access to specific web pages for each role, you modify the permission list.
5. | This concludes the Understanding Integration, Roles, and Security topic. 
   End of Procedure.

Enrolling in Benefits

PeopleSoft eBenefits enrollment pages are used to communicate to employees their benefit choices and to notify human resources of employees’ benefit elections.

The enrollment process begins when the system creates an enrollment event. Once employees are notified of an event, they can link to the Benefits Enrollment page from the eBenefits Home page. From the Benefits Enrollment page, you can then access the Enrollment Summary page, where you can review eligible benefit elections, as well as link to all plan-type pages where elections can be made.

After any plan-type election has been made, the employee is returned to the Enrollment Summary page to continue the selection process, and the process is repeated for each available benefit. After completing all elections, employees submit their choices.

Information about an individual’s current coverage comes from the base benefit tables. The system will not use the event date when pulling current coverage. It uses the deduction begin date on the BAS_PARTIC_PLAN rows. This date has been adjusted for grace and waiting periods. Using this date gives a more accurate current election and more closely matches what the background process will consider current.

Information about new coverage comes from the employee’s election or the default coverage. If the BAS_PARTIC_PLAN row has an election, either entered by the employee or pre-entered by the system, the system uses that entry as the basis for formatting the new coverage. If there is no entry, the system goes to the BAS_PARTIC_OPTN rows to find the default value. If there is no election and no default, the system displays the phrase “No Coverage”.
The plan-types (medical, vision, savings, FSA, and so on) display in the top row of the Coverage and Election Summary section. There is one multi-line entry for every plan type in the event. The plan types list in order based on the display plan sequence value in the benefit program definition.

For all plan-types, the system always shows the plans available and if there is the option of waiving coverage. However, the setup tables can be modified so that the system suppresses the plan types if the employees have no choice available.

In this topic, you just had a status change due to the birth of a new son. Your enrollment has been opened so he can make changes to your benefits. You want to make the following changes: add your family to your medical plan, change the beneficiary allocation amount for his life insurance, change the supplemental life plan, and add dependent care and health flexible spending accounts.

**Procedure**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>Benefits Enrollment</strong> page. Click the <strong>Self Service</strong> link.</td>
</tr>
</tbody>
</table>

![Image of Oracle interface showing Self Service link](Image)
Step 2. Click the **Benefits** link.

Step 3. Click the **Benefits Enrollment** link.

Step 4. Use the **Benefits Enrollment** page to review your enrollment information. This page displays information about an enrollment event. The enrollment process is initiated when eligibility and event rules have been processed to produce a list of valid benefit choices.
5. Click the **Information** icon to view additional information about your enrollment.

   Click the **Info** button.

6. Use the **Family Status Change** page to review your enrollment eligibility. This page indicates that enrollment has been opened due to a family status change.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

**Benefits Enrollment**

**Family Status Change**

Antonio Santos

Your record family status change event allows you to modify your current benefit choices.

You will have 31 days from the event date to update your benefits enrollment and submit your new choices.

The Enrollment Summary displays which benefit options are open for opts.

All your benefit changes will be effective the date of the family status change event.

**Open Benefits Event**

This benefit event is currently open for enrollment. To make your benefit choices, go back to the Benefits Enrollment page and click Select.

Once you click Select, it will take a few seconds for your benefit enrollment information to load.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>To begin the enrollment process, click the <strong>Select</strong> button. <strong>Click the Select button.</strong></td>
</tr>
<tr>
<td>9.</td>
<td>Notice the <strong>Family Status Change</strong> page now populates with your enrollment summary.</td>
</tr>
<tr>
<td>10.</td>
<td>Use the <strong>Enrollment Summary</strong> section, to view a summary list of your current and new benefits. You click the <strong>Edit</strong> button for any benefit you wish to update. <strong>In this exercise, you want to update the Medical plan to include your family members.</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td><strong>Click the Edit button.</strong></td>
</tr>
<tr>
<td>12.</td>
<td>Use the <strong>Medical</strong> page to view a lists of medical options and associated costs. This page also provides helpful information about the benefit.</td>
</tr>
</tbody>
</table>
Step 13.

You can view an overview of all the plans to help you determine the one in which you want to enroll.

Click the **Overview of all Plans** link.

[Overview of all Plans](#)
14. This page lists all the plans sorted by **Plan Name**. You can also view the list sorted by **Coverage Level**.

Click the **Sort By Coverage** button.

15. Click the **vertical** scrollbar.

16. When you're done reviewing the options, you can return to the previous page.

Click the **Return** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>In this exercise, you want to change to the <strong>HMO Plan 1</strong> option. You can scroll down to view the other options. Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>18.</td>
<td>You can click the plan name (for example, <strong>Medical HMO Plan 1</strong>) link for each plan to learn more about the plan. You can also search for providers within the plan by clicking the <strong>Search for providers in this plan</strong> link. For both links, a new browser window will open that displays the provider’s website. In this case, clicking these links will open the website for Kaiser Permanente. You will see how this works later in this topic. Click the <strong>Medical HMO Plan 1</strong> option.</td>
</tr>
<tr>
<td>19.</td>
<td>Scroll down to view the <strong>Enroll Your Dependents</strong> section. Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>20.</td>
<td>Use the <strong>Enroll Your Dependents</strong> section to select which of your dependents you want to enroll in the plan.</td>
</tr>
<tr>
<td>21.</td>
<td>In this exercise, you want to enroll all the listed dependents. Click the <strong>Megan Santos</strong> option.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>22.</td>
<td>Click the <strong>Marguerite Santos</strong> option.</td>
</tr>
<tr>
<td>23.</td>
<td>Click the <strong>Sean Santos</strong> option.</td>
</tr>
<tr>
<td>24.</td>
<td>Click the <strong>Samuel Santos</strong> option.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>26.</td>
<td>Use the <strong>Add/Review Dependents</strong> button to add additional dependents or review personal information for existing dependents.</td>
</tr>
<tr>
<td>27.</td>
<td>Next, use the <strong>Specify a Primary Care Provider ID</strong> field to enter your primary care providers ID number.</td>
</tr>
<tr>
<td>28.</td>
<td>If you are not sure of the ID, you can use the <strong>Select a Provider</strong> link to access the website for the health care provider you selected for your medical plan. Click the <strong>Select a Provider</strong> link.</td>
</tr>
</tbody>
</table>

![Screenshot of the interface showing the benefits enrollment section with options to specify a primary care provider ID and select a provider.](Attachment:BenefitsEnrollment.png)
### Step 29

**Action**

Note the helpful information displayed on this page.

Click the **OK** button.

<table>
<thead>
<tr>
<th><img src="image.png" alt="Image" /></th>
</tr>
</thead>
</table>

### Step 30

**Action**

A new browser window has opened. This is Kaiser Permanente's website, which you can use to search for and select a primary care provider. If the medical plan you selected was for a different health care provider, then this window would display different information.

In this exercise, you know the ID, and are going to enter it into the field instead of searching for one.

### Step 31

**Action**

Click the **Close** button.
Step | Action
--- | ---
32. | Click the **Return to Enrollment** link.

**Return to Enrollment**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>33.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>34.</td>
<td>Click in the <strong>Specify a Primary Care Provider ID</strong> field.</td>
</tr>
<tr>
<td>35.</td>
<td>Enter the desired information into the <strong>Specify a Primary Care Provider ID</strong> field. Enter &quot;KA589&quot;.</td>
</tr>
<tr>
<td>36.</td>
<td>You can select additional information about your provider. Select the first check box if you have previously seen this provider. Click the <strong>check box</strong> option.</td>
</tr>
<tr>
<td>37.</td>
<td>Select the second check box if you want to use the same provider for all your dependents. Click the <strong>check box</strong> option.</td>
</tr>
<tr>
<td>38.</td>
<td>Click the <strong>Continue</strong> button.</td>
</tr>
<tr>
<td>39.</td>
<td>The medical information is summarized on this page. Review the information and scroll down to continue.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>40.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>41.</td>
<td>You can save your changes now or go back to edit them if you notice something in the summary that you want to change. In this exercise, you want to save the changes. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>42.</td>
<td>Notice that the New field for <strong>Medical</strong> coverage has been updated with the new plan. For this exercise, you do not want to update dental or vision coverage. The next thing you want to update is the <strong>Basic Life Plan</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>43.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>44.</td>
<td>Click the <strong>Edit</strong> button.</td>
</tr>
<tr>
<td>45.</td>
<td>The <strong>Life</strong> page summarizes your selected option and also provides helpful information about the benefit. For this exercise, you want to update the allocation percents for each beneficiary. The <strong>Allocation</strong> section is at the bottom of the page.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>46.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>47.</td>
<td>Your beneficiaries are listed. You can add additional beneficiaries if needed as well as review existing beneficiaries' personal information by clicking the <strong>Add/Review Beneficiaries</strong> button. You can allocate by percent or amount. For this example, you want to use percent and are going to redistribute the percents to include your new son.</td>
</tr>
<tr>
<td>48.</td>
<td>Click in the <strong>New Primary Allocation</strong> field. <strong>100</strong></td>
</tr>
<tr>
<td>49.</td>
<td>Enter the desired information into the <strong>New Primary Allocation</strong> field. Enter &quot;<strong>55</strong>&quot;.</td>
</tr>
<tr>
<td>50.</td>
<td>Click in the <strong>New Primary Allocation</strong> field.</td>
</tr>
<tr>
<td>51.</td>
<td>Enter the desired information into the <strong>New Primary Allocation</strong> field. Enter &quot;<strong>10</strong>&quot;.</td>
</tr>
<tr>
<td>52.</td>
<td>Click in the <strong>New Primary Allocation</strong> field.</td>
</tr>
<tr>
<td>53.</td>
<td>Notice, as you update the <strong>New Primary Allocation</strong> field, the data existing in the <strong>New Secondary Allocation</strong> field disappears as you enter your new allocations.</td>
</tr>
<tr>
<td>54.</td>
<td>Enter the desired information into the <strong>New Primary Allocation</strong> field. Enter &quot;<strong>10</strong>&quot;.</td>
</tr>
<tr>
<td>55.</td>
<td>Click in the <strong>New Primary Allocation</strong> field.</td>
</tr>
<tr>
<td>56.</td>
<td>Enter the desired information into the <strong>New Primary Allocation</strong> field. Enter &quot;<strong>15</strong>&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>57.</td>
<td>Click in the <strong>New Primary Allocation</strong> field.</td>
</tr>
<tr>
<td>58.</td>
<td>Enter the desired information into the <strong>New Primary Allocation</strong> field. Enter &quot;10&quot;.</td>
</tr>
<tr>
<td>59.</td>
<td>The <strong>Total</strong> field updates when you click or tab out of the <strong>New Primary Allocation</strong> field. It will also update when you click the <strong>Continue</strong> button. The percents must equal 100 for all beneficiaries. Click the <strong>Continue</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>60.</td>
<td>This page summarizes the basic life plan coverage information. Click the <strong>OK</strong> button to save the changes. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>61.</td>
<td>The next benefit you want to update is the <strong>Supplemental Life</strong> plan. Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>62.</td>
<td>Click the <strong>Edit</strong> button.</td>
</tr>
<tr>
<td>63.</td>
<td>The <strong>Supplemental Life</strong> page summarizes the selected option and also provides helpful information about the benefit.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>64.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
</tbody>
</table>
| 65.  | For this exercise, you want to change to a different coverage level and also update the allocation percents for the beneficiaries.  
   Note that some options (the ones marked by an asterisk) require that you provide evidence of insurability before coverage takes effect.  
   Click the **Suppl Group Life 100K** ($100,000) option. |
| 66.  | You next want to update the allocation percents for the beneficiaries.  
   Click the **vertical** scrollbar. |
| 67.  | The **New Primary Allocation** and **New Secondary Allocation** fields are updated in the same way as on the **Basic Life** page. In this exercise, these fields will be updated for you to avoid repetition. |
| 68.  | Click the **Continue** button. |
| 69.  | The **Supplemental Life** page summarizes your supplemental life plan coverage information. |
### Step 70
Click the **vertical** scrollbar.

### Step 71
Click the **OK** button to save the changes.

Click the **OK** button.
Step | Action
--- | ---
72. | The next benefit you want to update are the flexible spending accounts. Click the *vertical* scrollbar.
73. | Click the *Edit* button.
74. | Use the *Flex Spending Dependent Care* page to view a summary of your current elections and some helpful information about the benefit.
75. | In this exercise, you are currently enrolled in the plan, but want to increase the annual pledge amount. There is information at the top of this page that states that the annual pledge must not exceed $5,000.00 and must be greater than $100 because you have already contributed that much to the account to date for this year.
76. You can use the worksheet feature to help determine the pledge amount if you are not sure what you want to contribute.

Click the Worksheet link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 77.  | Use this worksheet to determine your desired pledge amount.  
|      | Click in the **Your New Annual Pledge** field.  
|      | **2400.00** |
| 78.  | You want to see if you can manage contributing the maximum amount to the account.  
|      | Enter the desired information into the **Your New Annual Pledge** field. Enter **"5000.00"**. |
| 79.  | Click the **Calculate** button. |
| 80.  | Note that the calculated per-pay-period amount is $121.76. Suppose that you only want to contribute $100.00 per pay period. You can use this same worksheet to calculate by per-pay-period contribution. |
| 81.  | Click the **Estimate from Per-Pay-Period Contributions** button. |
| 82.  | Click in the **Estimated Per-Pay-Period Contribution** field.  
<p>|      | <strong>121.76</strong> |
| 83.  | Enter the desired information into the <strong>Estimated Per-Pay-Period Contribution</strong> field. Enter <strong>&quot;100.00&quot;</strong>. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>84.</td>
<td>Click the <strong>Calculate</strong> button.</td>
</tr>
<tr>
<td>85.</td>
<td>Note that the annual pledge amount calculates to $4260.22. This amount will be applied when you return to the <strong>Flex Spending Dependent Care</strong> page.</td>
</tr>
<tr>
<td>86.</td>
<td>Click the <strong>Return</strong> link.</td>
</tr>
</tbody>
</table>

**Step**

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>87.</td>
</tr>
<tr>
<td>88.</td>
</tr>
<tr>
<td>Step</td>
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<tr>
<td>------</td>
</tr>
<tr>
<td>89.</td>
</tr>
<tr>
<td>Step</td>
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<tr>
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<tr>
<td>90.</td>
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<tr>
<td>91.</td>
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<tr>
<td>92.</td>
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<tr>
<td>93.</td>
</tr>
<tr>
<td>94.</td>
</tr>
<tr>
<td>Step</td>
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<tr>
<td>------</td>
</tr>
<tr>
<td>95.</td>
</tr>
<tr>
<td>96.</td>
</tr>
<tr>
<td>97.</td>
</tr>
</tbody>
</table>

98. **Click the OK button.**

99. You have completed all the updates you want to the benefits plans and now need to submit the changes.
Step | Action
---|---
100. | Click the **vertical** scrollbar.
101. | Note the table at the bottom of the page that summarizes the estimated costs for the new benefit choices.
102. | Once you have reviewed everything and are sure you updated your plans correctly, you can submit your selections to the Benefits Department.

    Click the **Submit** button.

103. | Use the **Submit Benefit Choices** page to review important information about submitting your benefit information. Once you have read all the information, you either click the **Submit** button to continue or the **Cancel** button if you are not ready to submit your benefit choices.
### Step 104.

**Action**

Click the **Submit** button.

---

**Benefits Enrollment**

**Submit Benefit Choices**

**Antonio Santos**

You have almost completed your enrollment. If you have no further changes, click **Submit** at the bottom of this page. Thank you for your benefit choices!

**Benefits Enrollment**

**Submit Confirmation**

**Antonio Santos**

Your benefit choices have been successfully submitted to the Benefits Department. You will receive a confirmation statement in the mail to confirm your family status change enrollment.

To submit your Benefits Enrollment page, click **OK**.
Step | Action
--- | ---
105. | Click the **OK** button.

106. | Note that the **Event Status** has been updated to Submitted.

107. | You have successfully updated and submitted the benefits plans you selected for this current open enrollment period. **End of Procedure.**

### Reviewing Benefit Information

Once you have enrolled in benefits, you can review all your benefit information as needed.

Upon completion of this lesson, you will be able to:
- Review benefits summary information.
- Review health plan information.
- Review insurance information.
- Review savings plan information.
- Review flexible spending account information.
- Calculate pension estimates.

### Reviewing Benefits Summary Information

Employees use the **Benefits Summary** page to review all their benefits information, including health plans, insurance, savings plans, flexible spending accounts, and dependent and beneficiary information. Each of the benefit pages displays more detailed information about the specific plan-type, and includes links to additional benefit information.

This topic assumes that you have completed the enrollment process, and are accessing the benefits pages to review summarized your benefits information.

In this topic, you are going to review your benefits information.

**Procedure**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Benefits Summary** page.  
      | Click the **Self Service** link. |

![Self Service Link Image]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Benefits Summary</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Benefits Summary</td>
</tr>
<tr>
<td>3.</td>
<td>Use the <strong>Benefits Summary</strong> page to view a list of all the benefits in which you have enrolled. This page will display different benefit types depending on which benefits an organization provides, and your current coverage.</td>
</tr>
<tr>
<td>4.</td>
<td>When reviewing benefits information, it is always displayed as of the date indicated at the top of the page. The date defaults to the current system date. If you want to view the information as of a different date, you can override the date and click the <strong>Go</strong> button to display information as of the entered date.</td>
</tr>
</tbody>
</table>
5. To view the details of a benefit, you click the **Type of Benefit** link. You first want to view information for the **Medical** benefit.

Click the **Medical** link.

6. Use the **Medical** page to view a summary of the current plan in which you are enrolled.
7. From this page, you can click the Plan Provider link to open a new browser window that displays information about the health care provider. In this exercise, the current provider is Aetna Insurance.

Click the Aetna Insurance link.

Aetna Insurance

8. A new browser window opens displaying Aetna's website. You can use this site to search for information about the provider and the provider's health plans.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Click the <strong>Close</strong> button.</td>
</tr>
<tr>
<td>10.</td>
<td>The <strong>Medical</strong> page also displays a list of the covered dependents. You can click the dependent's name to view and edit the individual's personal information.</td>
</tr>
</tbody>
</table>
11. Click the **Return to Employee Benefit Summary** link.

[Return to Employee Benefit Summary]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>You next want to view information for your <strong>Dental</strong> benefits.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Dental</strong> link.</td>
</tr>
<tr>
<td>13.</td>
<td>Use the <strong>Dental</strong> page to view a summary of the current plan in which you are enrolled.</td>
</tr>
<tr>
<td>14.</td>
<td>From this page, you can click the <strong>Plan Provider</strong> link to open a new browser window that displays information about the dental care provider. This works the same as on the <strong>Medical</strong> page.</td>
</tr>
<tr>
<td>15.</td>
<td>This page also displays a list of the covered dependents. You can click the dependent’s name to view and edit the dependent’s personal information.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>Click the <strong>Return to Employee Benefit Summary</strong> link.</td>
</tr>
</tbody>
</table>

---

![Screen capture of the Dental page from Enterprise eBenefits 9.0 showing the Dental section of the benefits summary.](attachment:Screen_Shot.png)
17. You next want to view information for your Vision benefits.

Click the Vision link.

18. Use the Vision page to view a summary of the current plan in which you are enrolled.

19. From this page, you can click the Plan Provider link to open a new browser window that displays information about the vision care provider. This works the same as on the Medical page.

20. This page also displays a list of the covered dependents. You can click the dependent’s name to view and edit the individual’s personal information.
Step 21. Click the Return to Employee Benefit Summary link.

Return to Employee Benefit Summary
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>You next want to view information for your Life benefit. Click the <strong>Life</strong> link.</td>
</tr>
<tr>
<td>23.</td>
<td>Use the <strong>Life</strong> page to view a summary of the current plan in which you are enrolled.</td>
</tr>
<tr>
<td>24.</td>
<td>This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>Edit</strong> button to change the allocation. Click the <strong>Edit</strong> button.</td>
</tr>
<tr>
<td>26.</td>
<td>Use the <strong>Change Current Beneficiaries and Allocations</strong> page to add new beneficiaries and modify the primary and secondary allocation percents/amounts.</td>
</tr>
</tbody>
</table>
27. In this exercise, you do not want to make any changes.

Click the Return to Life Insurance Main 2x link.

28. You also can click the beneficiary’s name to view and edit the individual’s personal information.
Step 29. Click the **Return to Employee Benefit Summary** link.

Return to Employee Benefit Summary
### Training Guide
#### Enterprise eBenefits 9.0

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.</td>
<td>You next want to view information for your <strong>Supplemental Life</strong> benefit. Click the <strong>Supplemental Life</strong> link.</td>
</tr>
<tr>
<td>31.</td>
<td>Use the <strong>Supplemental Life</strong> page to view a summary of the current plan in which you are enrolled.</td>
</tr>
<tr>
<td>32.</td>
<td>This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount. You can click the beneficiary's name to view and edit the individual's personal information.</td>
</tr>
<tr>
<td>33.</td>
<td>Click the <strong>Edit</strong> button to change the allocation.</td>
</tr>
</tbody>
</table>

![Supplemental Life](image)

**Step**

34. Click the **Return to Employee Benefit Summary** link.

**Return to Employee Benefit Summary**

---

*Page 43*
35. You next want to view information for the Accidental Death and Dismemberment (AD and D) benefit.

Click the AD and D link.

36. Use the AD and D page to view a summary of the current plan in which you are enrolled.

37. This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.

You can click the beneficiary’s name to view and edit the individual’s personal information.

Click the Edit button to change the allocation if desired.
Step 38. Click the **Return to Employee Benefit Summary** link.

[Return to Employee Benefit Summary]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>39.</td>
<td>Next view the information for your <strong>Dependent Accidental Death and Dismemberment (AD and D)</strong> benefit. Click the <strong>Dependent AD and D</strong> link.</td>
</tr>
<tr>
<td>40.</td>
<td>Use the <strong>Dependent AD and D</strong> page to view a summary of the current plan in which your dependents are enrolled.</td>
</tr>
<tr>
<td>41.</td>
<td>This page also displays a list of the covered dependents and his or her coverage amount. In this example, there are no covered dependents for this benefit plan.</td>
</tr>
<tr>
<td>42.</td>
<td>Click the <strong>Return to Employee Benefit Summary</strong> link.</td>
</tr>
</tbody>
</table>
43. You next want to view information for the **Dependent Life** benefit.

   Click the **Dependent Life** link.

44. The **Dependent Life** page summarizes the current plan in which your dependents are enrolled.

45. This page also displays a list of the covered dependents and his or her coverage amount. In this example, there are no covered dependents for this benefit plan.
46. Click the **Return to Employee Benefit Summary** link.

**Return to Employee Benefit Summary**
### Step 47
Now view information for the **Supplemental Accidental Death and Dismemberment (AD and D)** benefit.

Click the **Supplemental AD and D** link.

### Step 48
The **Supplemental AD and D** page summarizes the current plan in which you are enrolled.

### Step 49
This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.

You can click the beneficiary's name to view and edit the individual's personal information.

Click the **Edit** button to change the allocation if desired.

### Step 50
Click the **Return to Employee Benefit Summary** link.
51. You next want to view information for the **Short-Term Disability** benefit.

   Click the **Short-Term Disability** link.

52. Use the **Short-Term Disability** page to view a summary of your short-term disability benefit plan.
Step 53. Click the **Return to Employee Benefit Summary** link.

[Return to Employee Benefit Summary]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 54. | View your **Long-Term Disability** plan.  
Click the **Long-Term Disability** link. |
| 55. | Use the **Long-Term Disability** page to view a summary of the plan in which you are enrolled. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>56.</td>
<td>Click the <strong>Return to Employee Benefit Summary</strong> link.</td>
</tr>
</tbody>
</table>

![Image of Long-Term Disability page]
57. View your 401(k) plan benefits.

Click the **401(k)** link.

58. The **401(k)** page summarizes the current plan in which you are enrolled.

59. From this page, you can click the **Edit** button in the **Current Contributions** section to update the before tax and after tax contributions.

60. This page also displays a list of the covered beneficiaries and his or her associated allocation percent.

You can click the beneficiary's name to view and edit the individual's personal information.

Click the **Edit** button to change the allocation if desired.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>61.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>62.</td>
<td>You can get additional information about the funds in which you are invested by clicking the <strong>Fund Allocations</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Fund Allocations</strong> link.</td>
</tr>
<tr>
<td>63.</td>
<td>Use the <strong>Fund Allocations</strong> page to view and edit your fund allocations. You can click the <strong>Change Current Fund Allocations</strong> button to modify the investment percent for the available funds. In this exercise, you do not want to make any changes.</td>
</tr>
</tbody>
</table>
Step: 64. Click the **Return to View All Savings Plans** link. [Return to View All Savings Plans]
65. Click the **vertical** scrollbar.

66. Click the **Return to Employee Benefit Summary** link.

   Return to Employee Benefit Summary

   ![Image of Oracle interface with Benefits Summary]

   **Benefits Summary**

   **Antonio Santos**

   To view your benefits as of another date, enter the dates and click OK.

<table>
<thead>
<tr>
<th>Type of Benefit</th>
<th>Monthly/Annual</th>
<th>Coverage or Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Yes</td>
<td>Coverage</td>
</tr>
<tr>
<td>Dental</td>
<td>Yes</td>
<td>Family</td>
</tr>
<tr>
<td>Vision</td>
<td>Yes</td>
<td>Family</td>
</tr>
<tr>
<td>Life</td>
<td>Yes</td>
<td>Basic Life Plan $10000</td>
</tr>
<tr>
<td>Disability</td>
<td>Yes</td>
<td>Dependent Accidental Death $1000</td>
</tr>
<tr>
<td>Profit Sharing</td>
<td>Yes</td>
<td>Participation</td>
</tr>
</tbody>
</table>

   **You next want to view information for the **Profit Sharing** benefit.**

   Click the **Profit Share** link.

   ![Image of Oracle interface with Profit Sharing]

   **Profit Sharing**

   **You next want to view information for the **Profit Sharing** benefit.**

   ![Image of Oracle interface with Profit Sharing]

   **Profit Sharing**

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   **Profit Sharing**

   **You next want to view information for the **Profit Sharing** benefit.**

   ![Image of Oracle interface with Profit Sharing]

   **Profit Sharing**

   **You next want to view information for the **Profit Sharing** benefit.**

   ![Image of Oracle interface with Profit Sharing]
### Step 70
Click the **vertical** scrollbar.

### Step 71
Click the **Return to Employee Benefit Summary** link.

[Return to Employee Benefit Summary](#)
72. Click the **Flex Spending Health - U.S.** link.

73. Use the **Flexible Spending Accounts** page to review details for your flexible spending account.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>74.</td>
<td>In this example, the employee is not enrolled in any spending accounts for the specified year. You can view previous years from this page if desired.</td>
</tr>
<tr>
<td></td>
<td>Click in the <strong>Year</strong> field.</td>
</tr>
<tr>
<td></td>
<td><strong>2007</strong></td>
</tr>
<tr>
<td>75.</td>
<td>Enter the desired information into the <strong>Year</strong> field. Enter &quot;2000&quot;.</td>
</tr>
<tr>
<td>76.</td>
<td>Click the <strong>Go</strong> button.</td>
</tr>
<tr>
<td>77.</td>
<td>Use the <strong>Flexible Spending Account Review</strong> page to view a summary of your flexible spending account activities.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
78. | Click the **vertical** scrollbar.
79. | Use the **Claim History** section view details of claims submitted for payment.
80. | Use the **Payment History** section to view details of payments made towards the claims you’ve submitted.
81. | Click the **Return to Flexible Spending Accounts** link.

[Return to Flexible Spending Accounts]
82. Click the **Return to Employee Benefit Summary** link.

*Return to Employee Benefit Summary*
### Step 83
**Action**

View information for your **Flex Spending Dependent Care** benefit.

Click the **Flex Spending Dependent Care** link.

![Flex Spending Dependent Care Link](image1.png)

### Step 84
**Action**

Similar to the **Flex Spending Health - U.S.** benefit, you do not have any flexible dependent care accounts for the specified year. You can view previous years if desired and view the details of accounts by linking to the corresponding review pages.

![Reviewing Flexible Spending Accounts](image2.png)

### Step 85
**Action**

Click the **Return to Employee Benefit Summary** link.

![Return to Benefits Summary](image3.png)

### Step 86
**Action**

You have successfully reviewed all your benefit information.

**End of Procedure.**

---

### Reviewing Health Plan Information

Employees use the **Health Care Summary** page to review health care coverage by clicking any health plan link that they are interested in reviewing, such as medical, dental, vision, and so on. Each of these pages displays more detailed information about the specific plan-type, and includes links to provider pages, employee handbooks, and dependent information pages. These pages can also be accessed from the **Benefits Summary** page.
This topic assumes that you have completed the enrollment process, and are accessing the Health Plan pages to review health plan information.

In this topic, you are going to review your health plan information.

Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>Health Care Summary</strong> page. Click the <strong>Self Service</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Benefits</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Health Care Summary</strong> link.</td>
</tr>
<tr>
<td>4.</td>
<td>Use the <strong>Health Care Summary</strong> page to view a summary of your current health care plans and benefits.</td>
</tr>
<tr>
<td>5.</td>
<td>When reviewing benefits information, it is always displayed as of the date indicated at the top of the page. The date defaults to the current system date. If you want to view the information as of a different date, you can override the date and click the <strong>Go</strong> button to display information as of the entered date.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 6.   | View more details about your **Medical** plan and benefits.  
      Click the **Medical** link. |
| 7.   | Use the **Medical** page to review the current plan in which you are enrolled. |
Step | Action
--- | ---
8. | From this page, you can click the Plan Provider link to open a new browser window that displays information about the health care provider. In this exercise, the current provider is Aetna Insurance.

Click the Aetna Insurance link.

Aetna Insurance

9. | A new browser window opens displaying Aetna's website. You can use this site to search for information about the provider and the provider's health plans.
Step 10. Click the Close button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Click the <strong>Return to Health Care Summary</strong> link.</td>
</tr>
<tr>
<td></td>
<td><strong>Return to Health Care Summary</strong></td>
</tr>
<tr>
<td>12.</td>
<td>Next, view your <strong>Dental</strong> benefits.</td>
</tr>
<tr>
<td></td>
<td>Click an entry in the <strong>Type of Benefit</strong> column. <strong>Dental</strong></td>
</tr>
<tr>
<td>13.</td>
<td>Use the <strong>Dental</strong> page to review a summary of your current dental benefits.</td>
</tr>
<tr>
<td>14.</td>
<td>From this page, you can click the <strong>Plan Provider</strong> link to open a new browser window that displays information about the dental care provider. This works the same as on the <strong>Medical</strong> page.</td>
</tr>
<tr>
<td>15.</td>
<td>This page also displays a list of the covered dependents. You can click your dependent’s name to view and edit the individual’s personal information.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
16. | **Click the** [Return to Health Care Summary](#) [link].
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 17.  | Now review your **Vision** benefits.  
Click the **Vision** link. |
| 18.  | Use the **Vision** page to view a summary of your current vision plan and benefits. |
| 19.  | Click the **Plan Provider** link to open a new browser window that displays information about the dental care provider. This works the same as on the **Medical** page. |
| 20.  | This page also displays a list of the covered dependents. You can click your dependent's name to view and edit the individual's personal information. |

![](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td>Click the <strong>Return to Health Care Summary</strong> link.</td>
</tr>
</tbody>
</table>

[Return to Health Care Summary]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 22. | Now navigate to the **Health Care Dependent Summary** page.  
   Click the **Health Care Dependent Summary** link. |
| 23. | Use the **Health Care Dependent Summary** page to review your covered dependents for all the health care benefits in which you are enrolled. |
| 24. | You can click your dependent's name to view and edit the individual's personal information. |
25. By default, the list is sorted by type of benefit. You can also view the list sorted by the dependent's names.

Click the **Dependent's Summary by Name** link.

26. The list now shows the plans for each of the covered dependents.

27. From this page, you can navigate back to the **Health Care Summary** page.

Click the **vertical** scrollbar.

28. Click the **Return to Health Care Summary** link.

29. You have successfully reviewed your health care summary information.

**End of Procedure.**

**Reviewing Insurance Information**

This topic assumes that you have completed the enrollment process, and are accessing insurance plan pages to review insurance plan information or to modify your beneficiary allocations.

Pages displaying employee insurance plans are presented in a manner that enables you to navigate from summary level pages to more detailed information by clicking the appropriate insurance plan links. These pages can also be accessed from the **Benefits Summary** page.

In this topic, you will review your insurance information and update the beneficiary allocation percentages for basic life insurance.
Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>Insurance Summary</strong> page. Click the <strong>Self Service</strong> link.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
2. | Click the **Benefits** link.
3. | Click the **Insurance Summary** link.
4. | Use the **Insurance Summary** page to view your current insurance benefits options.
5. | When reviewing benefits information, it is always displayed as of the date indicated at the top of the page. The date defaults to the current system date. If you want to view the information as of a different date, you can override the date and click the **Go** button to display information as of the entered date.
Step | Action
--- | ---
6. | Click the **Life** link.
7. | Use the **Life** page to view your current Life benefits in which you are enrolled.
8. | This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.
9. Click the **Edit** button.

10. Use the **Change Current Beneficiaries and Allocations** page to add new beneficiaries and modify the primary and secondary allocation percents/amounts.

11. In this exercise, you want to change the primary allocation percentages for the listed beneficiaries.
Step | Action
--- | ---
12. | Click in the New Primary Allocation field.
13. | Enter the desired information into the New Primary Allocation field. Enter "10".
14. | Click in the New Primary Allocation field.
15. | Enter the desired information into the New Primary Allocation field. Enter "10".
16. | Click in the New Primary Allocation field.
17. | Enter the desired information into the New Primary Allocation field. Enter "10".
18. | Click in the New Primary Allocation field.
19. | Enter the desired information into the New Primary Allocation field. Enter "10".
20. | Click in the New Primary Allocation field.
21. | Enter the desired information into the New Primary Allocation field. Enter "5".
22. | Click in the New Primary Allocation field.
23. | Enter the desired information into the New Primary Allocation field. Enter "5".
### Step 24
The total must equal 100 percent before you can save the page.

- Click the **Update Totals** button.

### Step 25
Click the **Save** button.

### Step 26
Click the **OK** button.

### Step 27
Notice that the **Current Primary Percent** column has been updated.
28. Click the **Return to Life Insurance Main 2x** link.

29. You also can click your beneficiary's name to view and edit the individual's personal information.
Step 30. Click the Return to Insurance Summary link.
### Step 31
You next want to view information for your **Supplemental Life** benefit.

Click the **Supplemental Life** link.

### Step 32
Use the **Supplemental Life** page to view a summary of your enrolled plan and benefits.

### Step 33
This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.

You can click the beneficiary's name to view and edit the individual's personal information.

Click the **Edit** button to change the allocation if desired.

![Supplemental Life page](image)

### Step 34
Click the **Return to Insurance Summary** link.

**Return to Insurance Summary**
35. You next want to view information for your **AD and D** (Accidental Death and Dismemberment) benefits.

   Click the **AD and D** link.

36. Use the **AD and D** page to view your current accidental death and dismemberment plan and benefits.

37. This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.

   You can click the beneficiary’s name to view and edit the individual's personal information.

38. Click the **Edit** button to change the allocation if desired.
Step 39. Click the Return to Insurance Summary link.

Return to Insurance Summary
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>40.</td>
<td>Click the <strong>Dependent AD and D</strong> link.</td>
</tr>
<tr>
<td>41.</td>
<td>Use the <strong>Dependent AD and D</strong> page to review your dependent's current accidental death and dismemberment plan and benefits.</td>
</tr>
<tr>
<td>42.</td>
<td>This page also displays a list of the covered dependents under your selected plan.</td>
</tr>
<tr>
<td>43.</td>
<td>Click the <strong>Return to Insurance Summary</strong> link.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
44. | Next, view your **Dependent Life** benefits.

Click the **Dependent Life** link.

45. | Use the **Dependent Life** page to review a summary of your dependent life benefits.

46. | This page also displays a list of the covered dependents under your selected plan.
47. Click the **Return to Insurance Summary** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>48.</td>
<td>Click the <strong>Supplemental AD and D</strong> link.</td>
</tr>
<tr>
<td>49.</td>
<td>Use the <strong>Supplemental AD and D</strong> page to review a summary of the supplemental accidental death and dismemberment plan in which you are currently enrolled in.</td>
</tr>
</tbody>
</table>
| 50.  | This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.  
You can click the beneficiary's name to view and edit the individual's personal information. |
| 51.  | Click the **Edit** button to change the allocation if desired. |

**Supplemental AD and D**

**Antonio Santos**

To view your benefits as of another date, enter the date and click Go:<br>04/19/2017  

<table>
<thead>
<tr>
<th>Plan Name</th>
<th>Coverage Level</th>
<th>Group Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplemental AD</td>
<td>$100K</td>
<td>$100000</td>
</tr>
</tbody>
</table>

**Customer Service:**

- Click to edit your current beneficiary allocations. Click the beneficiary's name to edit that individual's personal information.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Coverage Level</th>
<th>Coverage Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marisa Santos</td>
<td>Spouse</td>
<td>70%</td>
<td></td>
</tr>
<tr>
<td>Marissa Santos</td>
<td>Child</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Sarah Santos</td>
<td>Child</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Carlos Santos</td>
<td>Parent</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

**Return to Insurance Summary**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>52.</td>
<td>Click the <strong>Return to Insurance Summary</strong> link.</td>
</tr>
</tbody>
</table>

**Return to Insurance Summary**
53. Now navigate to view your **Short-Term Disability** benefits.

   Click the **Short-Term Disability** link.

54. Use the **Short-Term Disability** page to view a summary of your currently enrolled benefits.
Step 55. Click the **Return to Insurance Summary** link.

[Return to Insurance Summary]
### Step 56
Now view your **Long-Term Disability** benefits.

Click the **Long-Term Disability** link.

[Long-Term Disability]

### Step 57
Use the **Long-Term Disability** page to view your currently enrolled long-term disability benefits.

### Step 58
Click the **Return to Insurance Summary** link.

[Return to Insurance Summary]
59. You can navigate to the **Insurance Beneficiary Summary** page.

Click the **Insurance Beneficiary Summary** link.

60. Use **Insurance Beneficiary Summary** page to review your beneficiaries and their allocation amounts/percent for all the insurance benefits in which you and your dependents are enrolled.
Step | Action
--- | ---
61. | By default, the list is sorted by type of benefit. You can also view the list sorted by the beneficiary's names.

Click the View Summary by Beneficiary Name link.
[View Summary by Beneficiary Name](#)

62. | The list now shows the plans for each of the beneficiaries

Click the Return to Insurance Summary link.
[Return to Insurance Summary](#)

63. | You have successfully reviewed and edited your insurance benefit information.
**End of Procedure.**

Reviewing Savings Plan Information

Savings plan pages enable employees to access information about their savings plans. They may view information about their benefit selections, and then make any changes allowed by an organization’s program rules. These pages can also be accessed from the Benefits Summary page.

In this topic, you will review your savings plan information, update your 401(k) contribution, modify the beneficiary allocation percents for your 401(k) plan, and change the fund allocations for your 401(k) plan.

**Procedure**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Savings Summary** page.  

Click the **Self Service** link.  

[Self Service]  

![Self Service Link](http://example.com/self-service.png) |
2. Click the **Benefits** link.

3. Click the **Savings Summary** link.

4. Use the **Savings Summary** page to view a list of all the savings benefits in which you have enrolled in. This page will display different benefit types depending on which benefits your organization provides, and your current coverage.

5. When reviewing benefits information, it is always displayed as of the date indicated at the top of the page. The date defaults to the current system date. If you want to view the information as of a different date, you can override the date and click the **Go** button to display information as of the entered date.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>You first want to view information for your 401(k) benefit. Click the <strong>401(k)</strong> link.</td>
</tr>
<tr>
<td>7.</td>
<td>Use the <strong>401(k)</strong> page to review a summary of the current plan in which you are enrolled.</td>
</tr>
</tbody>
</table>
**Step**  |  **Action**  
--- | ---  
8. | From this page, you can click the **Edit** button in the **Current Contributions** section to update the before tax and after tax contributions.  

In this exercise, you want increase the **Before Tax** contribution.  

Click the **Edit** button.  

--- | ---  
9. | Use the **Change Current Savings Plan Contributions** page to change the **Before Tax** and **After Tax** contributions. Changes can be made as percents or flat dollar amounts.
10. Enter the desired information into the or field. Enter "5.000".

11. Click the Save button.
Step | Action
--- | ---
12. | Click the OK button.

OK
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Click the <strong>Return to View All Savings Plans</strong> link.</td>
</tr>
<tr>
<td>14.</td>
<td>Note that <strong>Before Tax</strong> percentage has been updated.</td>
</tr>
<tr>
<td>15.</td>
<td>In the <strong>Covered Beneficiaries</strong> section is a list of the covered beneficiaries and his or her associated allocation percent. You click the <strong>Edit</strong> button to change the allocation percent.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>Click the <strong>Edit</strong> button.</td>
</tr>
<tr>
<td>17.</td>
<td>Use the <strong>Change Current Beneficiaries and Allocations</strong> page to add new beneficiaries and edit the allocation percent for existing beneficiaries.</td>
</tr>
<tr>
<td>18.</td>
<td>In this exercise, you want to modify the percents for the listed beneficiaries.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
19. | Click in the **New Primary Allocation** field. 
20. | Enter the desired information into the **New Primary Allocation** field. Enter "50". 
21. | The totals must equal 100 percent before you can save the page. Click the **Update Totals** button. 
22. | Click the **Save** button.
Step | Action
--- | ---
23. | Click the **OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>Return to View All Savings Plans</strong> link.</td>
</tr>
<tr>
<td>26.</td>
<td>Note that the <strong>Allocation Percent</strong> has been updated for the listed beneficiaries. You also can click the beneficiary's name to view and edit the individual's personal information.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>27.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>28.</td>
<td>You can get additional information about the funds in which you invested by clicking the <strong>Fund Allocations</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Fund Allocations</strong> link.</td>
</tr>
<tr>
<td>29.</td>
<td>Use the <strong>Fund Allocations</strong> page to view and edit your fund allocations.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>30.</td>
<td>You click the <strong>Change Current Fund Allocations</strong> button to modify the investment percent for the available funds. In this exercise, you want to change the investment percents. Click the <strong>Change Current Fund Allocations</strong> button.</td>
</tr>
<tr>
<td></td>
<td><strong>Change Current Fund Allocations</strong></td>
</tr>
<tr>
<td>31.</td>
<td>Use the <strong>Change Current Fund Allocations</strong> page to edit the percent allocation for the available funds.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>32.</td>
<td>Enter the desired information into the <strong>New Percent</strong> field. Enter &quot;40&quot;.</td>
</tr>
<tr>
<td>33.</td>
<td>Click in the <strong>New Percent</strong> field.</td>
</tr>
<tr>
<td>34.</td>
<td>Enter the desired information into the <strong>New Percent</strong> field. Enter &quot;20&quot;.</td>
</tr>
<tr>
<td>35.</td>
<td>Click in the <strong>New Percent</strong> field.</td>
</tr>
<tr>
<td>36.</td>
<td>Enter the desired information into the <strong>New Percent</strong> field. Enter &quot;20&quot;.</td>
</tr>
<tr>
<td>37.</td>
<td>Click in the <strong>New Percent</strong> field.</td>
</tr>
<tr>
<td>38.</td>
<td>Enter the desired information into the <strong>New Percent</strong> field. Enter &quot;20&quot;.</td>
</tr>
<tr>
<td>39.</td>
<td>The totals must equal 100 percent before you can save the page. Click the <strong>Update Totals</strong> button.</td>
</tr>
<tr>
<td>40.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
Step 41. Click the **OK** button.

```
OK
```
Step 42. Click the **Return to Fund Allocations** link.

Step 43. Note that the investment percents have been updated.

Click the **Return to View All Savings Plans** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>44.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>45.</td>
<td>The 401(k) information has been updated. Return to the <strong>Savings Summary</strong> page to review the other savings benefits. Click the <strong>Return to Savings Summary</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 46.  | You next want to view information for the **Profit Sharing** benefit.  
Click the **Profit Sharing** link.  
*Profit Sharing* |
| 47.  | Use the **Profit Sharing** page to view the current plan in which you are enrolled. |
| 48.  | Note the text in the Current Contributions section that states that this is an employer only contribution plan and the employee cannot contribute to it. |
### Step 49
Click the **vertical** scrollbar.

### Step 50
Click the **Return to Savings Summary** link.

*Return to Savings Summary*
51. There are links at the bottom of the page for additional summary savings information.

Click the **Savings Beneficiary Summary** link.

52. Use the **Beneficiaries for All Savings Plans** page to view your beneficiaries and your allocation percents for all the savings benefits in which you are enrolled.
53. By default, the list is sorted by type of benefit. You can also view the list sorted by the beneficiary's names.

Click the **View Summary by Beneficiary Name** link.

54. The list now shows the plans for each of the beneficiaries.

You can click the beneficiary's name to view and edit the individual's personal information.

55. Click the **Return to Savings Summary** link.
56. Click the **Savings Contribution Summary** link.

57. The **Savings Contributions for All Plans** page displays the contribution amount for each of the savings benefits in which you are currently enrolled.
Step 58. Click the **Return to Savings Summary** link.

**Return to Savings Summary**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>59.</td>
<td>You can also navigate to the <strong>Pension Estimates</strong> page from here.</td>
</tr>
</tbody>
</table>

   Click the **Pension Estimates** link.  

| 60. | Use the **Pension Estimates** page to calculate and view pension benefit estimates. Separate estimates may be created to illustrate how different retirement dates could affect the pension benefit amount. |

---

**Reviewing Flexible Spending Account (FSA) Information**

This topic assumes that the employee has completed the enrollment process and enrolled in Flexible Spending Accounts (FSA) accounts, and is accessing FSA plan pages to review plan information. Pages displaying employee FSA plans enable the user to navigate from summary level pages to more detailed information by clicking the appropriate plan links.

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>61.</td>
<td>Click the <strong>vertical</strong> scrollbar.</td>
</tr>
</tbody>
</table>
| 62. | Click the **Return to Savings Summary** link.  

**Return to Savings Summary** |

| 63. | You have successfully reviewed and edited your savings benefits information.  

**End of Procedure.** |
Flexible Spending Accounts (FSA) are plans that enable employees to save money on out-of-pocket health or dependent care expenses by enabling them to pay with pretax dollars. There are two types of accounts:

- **Health Care Spending Account** (HCSA). Employees can elect to contribute money on a pretax basis to this type of account and later reimburse themselves for certain qualifying medical expenses.
- **Dependent Care Spending Account** (DCSA). Employees contribute pretax dollars into this account and use it to reimburse themselves for day care expenses.

In this topic, you will review your health and dependent care Flexible Spending Account information.

### Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>Flexible Spending Accounts</strong> page. Click the <strong>Self Service</strong> link.</td>
</tr>
</tbody>
</table>

![Image of the interface showing the navigation to Flexible Spending Accounts and clicking the Self Service link.](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Benefits</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Benefits Information</strong> link.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Flexible Spending Accounts</strong> link.</td>
</tr>
<tr>
<td>5.</td>
<td>Use the <strong>Flexible Spending Accounts</strong> page to review Flexible Spending Account (FSA) information for a specified year. It defaults to the current year based on the system date.</td>
</tr>
<tr>
<td>6.</td>
<td>To view previous years, change the <strong>Year</strong> field for a previous year by entering the desired year and clicking the <strong>Go</strong> button.</td>
</tr>
<tr>
<td>7.</td>
<td>All available accounts for the indicated year are listed in the <strong>Select Account</strong> section. For this example, you are not currently enrolled in any spending accounts.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>8.</td>
<td>You would like to review your elections from year 2000. Click in the <strong>Year</strong> field. <strong>2007</strong></td>
</tr>
<tr>
<td>9.</td>
<td>Enter the desired information into the <strong>Year</strong> field. Enter <strong>&quot;2000&quot;</strong>.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Go</strong> button.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Healthcare FSA</strong> link. <strong>Healthcare FSA</strong></td>
</tr>
<tr>
<td>12.</td>
<td>The <strong>Flexible Spending Account Review</strong> page displays account summary information for your <strong>Healthcare FSA</strong>, that includes pledge amounts; amounts contributed to the account; claims submitted, approved, and paid for the account; and account balance calculations.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>13.</td>
<td>Detailed claim information is displayed at the bottom of the page. Click the <strong>vertical</strong> scrollbar.</td>
</tr>
<tr>
<td>14.</td>
<td>Each claim is listed in descending order based on the service start date. To view details about a specific claim, click the <strong>Service Start Date</strong> link. Click the <strong>04/18/2000</strong> link.</td>
</tr>
<tr>
<td>15.</td>
<td>Use the <strong>Flexible Spending Account Claims Details</strong> page to view detailed information about the account including dates, amounts, and status.</td>
</tr>
</tbody>
</table>
16. From this page, you can navigate to the detailed payment history information that is associated with this claim.

Click the Payment History link.

17. The Flexible Spending Account Claim Payments page displays information about the check(s) issued to pay the claim. The check amount may be more than the claim amount if the check was issued to pay multiple claims.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.</td>
<td>Click the <strong>Return to Flexible Spending Account Claim Details</strong> link.</td>
</tr>
</tbody>
</table>

**Return to Flexible Spending Account Claim Details**
### Step 19
Click an entry in the **Spending Account** column.

- **Dependent Care FSA**

### Step 20
The information is organized and displayed in the same way as for the health care account.

### Step 21
Click the **vertical scrollbar**.

### Step 22
You can view detailed claim and payment information in the same way as with the health care account.

Click the **03/14/2000** link.
## Step 23
Review the details on this page.

Click the **Return** link.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>Review the details on this page.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Return</strong> link.</td>
</tr>
</tbody>
</table>

[Return]
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Calculating Pension Estimates

Employees use the Estimate Pensions self-service transaction to calculate and view their Pension Benefit estimates. Separate estimates may be created to illustrate how different retirement dates could affect the pension benefit amount.

In this topic, you will calculate your estimated pension benefits based on criteria that you enter.

Procedure

Step | Action
--- | ---
24. | Click the **vertical** scrollbar.
25. | Click the **Return to Flexible Spending Account Review** link.
26. | You have successfully reviewed your Flexible Spending Account (FSA) information.

**End of Procedure.**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Pension Estimates** page.  
Click the **Self Service** link. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Benefits</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Benefits Information</strong> link.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Pension Estimates</strong> link.</td>
</tr>
<tr>
<td>5.</td>
<td>Use the <strong>Pension Estimates</strong> page to enter criteria to be used to estimate a pension benefit for an employee.</td>
</tr>
<tr>
<td>6.</td>
<td>Your birth date and your spouse’s (if applicable) birth dates appear at the top of the page. You can estimate the pension benefits for an employee as of a specific date or as of a certain age. For this exercise, you are going to estimate based on a date.</td>
</tr>
</tbody>
</table>
7. **Click the Date option.**

8. **Click in the Date field.**

9. **Enter the desired information into the Date field. Enter "12/01/2005".**

10. **Click the Date option.**

11. **Click in the Date field.**

12. **Enter the desired information into the Date field. Enter "12/01/2005".**

13. **In the Assumptions section, the current annual salary for the employee is listed. You can enter an estimated annual increase to account for changes to the salary up to the time of retirement.**

14. **Click in the % field.**

15. **Enter the desired information into the % field. Enter "3".**

16. **Click the Calculate Pension button.**

17. **Use the Disclaimer page to either accept or decline the fact that the results of the calculation are estimates only.**
18. Click the **Accept** button.

19. Use the **Pension Plan Estimates** page to select one of the pension plan you qualify for to review.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td>Click the <strong>GBI Salaried Plan</strong> link.</td>
</tr>
<tr>
<td>21.</td>
<td>The <strong>GBI Salaried Plan</strong> page displays a list of all the estimated benefit payment options for a specified plan.</td>
</tr>
<tr>
<td>22.</td>
<td>You can click the <strong>Descriptions of Options for Forms of Payment</strong> link to view a description of the payment options your organization has defined for the available Pension plans.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
23. | Click the **Return to View Plan Summary** link.
24. | You have successfully calculated your estimated pension benefits.

**End of Procedure.**

### Reviewing Dependent and Beneficiary Summary Information

Employees use the dependent/beneficiary pages to view and edit information about their dependents and beneficiaries. These pages summarize personal and coverage information for all dependents and beneficiaries associated with an employee. This information can be obtained from the other pages in eBenefits where dependents and beneficiaries are listed, but it is sometimes easier to review in a summarized format on one page.

Upon completion of this lesson, you will be able to:
- Review dependent and beneficiary summary information.
- Review health care dependent summary information.
- Review insurance beneficiary summary information.
- Review savings beneficiary summary information.

### Reviewing Dependent and Beneficiary Summary Information

In this topic, you will review dependent and beneficiary summary information.

**Procedure**
Step | Action
--- | ---
1. | Begin by navigating to the **Dependent and Beneficiary Personal Information** page.

   Click the **Self Service** link.

![Self Service link](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Benefits</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Dependent/Beneficiary Info</strong> link.</td>
</tr>
<tr>
<td>4.</td>
<td>Use the <strong>Dependent and Beneficiary Personal Information</strong> page to review and update personal information for each of your dependents/beneficiaries.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
5. | You can click the dependent or beneficiary name link to review or change any of this information.

Click the **Name** link.

**Megan Santos**

6. | Use the **Dependent/Beneficiary Personal Information** page to review your dependent’s personal information.
Step                  Action

7.                   Click the **vertical** scrollbar.

8.                   Click the **Edit** button if you need to make any changes to the information on this page.

9.                   Click the **Return to Dependent/Beneficiary Summary** link.

[Return to Dependent/Beneficiary Summary]
10. Click the **Dependent/Beneficiary Coverage Summary** link.

**Dependent/Beneficiary Coverage Summary**

11. Use the **Dependent and Beneficiary Coverage Summary** page to review a summary list of all the benefits assigned to each of your dependents and beneficiaries.
Step | Action
--- | ---
12. | Click the **vertical** scrollbar.
13. | Click the **Return to Dependent/Beneficiary Summary** link. [Return to Dependent/Beneficiary Summary]
14. | You have successfully reviewed your dependent and beneficiary information. **End of Procedure.**

Reviewing Health Care Dependent Summary Information

In this topic, you will review health care dependent summary information for your dependents.

**Procedure**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Health Care Dependent Summary** page.  
Click the **Self Service** link. |

[ ![Self Service](self-service.png) ]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Benefits</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Health Care Dependent Summary</strong> link.</td>
</tr>
<tr>
<td></td>
<td><a href="#">Health Care Dependent Summary</a></td>
</tr>
<tr>
<td>4.</td>
<td>Use the <strong>Health Care Dependent Summary</strong> page to review dependents covered under your health plans.</td>
</tr>
</tbody>
</table>
5. Click the **Megan Santos** link.

6. Use the **Dependent/Beneficiary Personal Information** page to review and/or update your dependent’s or beneficiary’s personal information.
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Reviewing Insurance Beneficiary Summary Information

In this topic, you will review insurance beneficiary summary information for your dependents.

**Procedure**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <em>vertical</em> scrollbar.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>Edit</strong> button if you need to make any changes to the information on this page. When done, you can return to the <strong>Health Care Dependent Summary</strong> page.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Return to Health care dependent summary</strong> link.</td>
</tr>
<tr>
<td>10.</td>
<td>You have successfully reviewed health care dependent summary information. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

**Reviewing Insurance Beneficiary Summary Information**

In this topic, you will review insurance beneficiary summary information for your dependents.

**Procedure**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <em>vertical</em> scrollbar.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>Edit</strong> button if you need to make any changes to the information on this page. When done, you can return to the <strong>Health Care Dependent Summary</strong> page.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Return to Health care dependent summary</strong> link.</td>
</tr>
<tr>
<td>10.</td>
<td>You have successfully reviewed health care dependent summary information. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
### Step 1

Begin by navigating to the **Insurance Beneficiaries by Type of Benefit** page.

Click the **Self Service** link.

![Self Service link](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Benefits</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Insurance Beneficiary Summary</strong> link.</td>
</tr>
<tr>
<td>4.</td>
<td>Use the <strong>Insurance Beneficiaries by Type of Benefit</strong> page to review beneficiary insurance information.</td>
</tr>
</tbody>
</table>
5. By default, the list is sorted by type of benefit. You can also view the list sorted by the beneficiary's names.

Click the **View Summary by Beneficiary Name** link.

[View Summary by Beneficiary Name](#)

6. Click the **Name** link to view the personal information for a beneficiary.

Click the **Marguerite Santos** link.

[Marguerite Santos](#)

7. Use the **Dependent/Beneficiary Personal Information** page to review and/or update your dependent's or beneficiary's personal information.
8. Click the vertical scrollbar.

9. Click the Edit button if you need to make any changes to the information on this page. When done, you can return to the Insurance Beneficiaries by Type of Benefit page.

10. Click the Return to View All Benefit Allocations link.

11. You have successfully reviewed insurance beneficiary summary information. End of Procedure.

Reviewing Savings and Beneficiary Summary Information

In this topic, you will review your savings beneficiary summary information for your dependents.

Procedure
### Step 1

Begin by navigating to the **Beneficiaries for All Savings Plan** page.

Click the **Self Service** link.
2. Click the **Benefits** link.

3. Click the **Savings Beneficiary Summary** link.

4. Use the **Beneficiaries for All Savings Plans** page to view savings plan beneficiary allocations.
5. By default, the list is sorted by type of benefit. You can also view the list sorted by the beneficiary's names.

   Click the **View Summary by Beneficiary Name** link.
   
   [View Summary by Beneficiary Name]

6. Click the **Name** link to view the personal information for a beneficiary.

   Click the **Megan Santos** link.
   
   [Megan Santos]

7. Use the **Dependent/Beneficiary Personal Information** page to review and/or update your dependent's or beneficiary's personal information.
8. Click the vertical scrollbar.

9. Click the Edit button if you need to make any changes to the information on this page.

10. Click the Return to Beneficiaries for All Savings Plans link.

11. You have successfully reviewed savings beneficiary summary information for your dependents.  

End of Procedure.

Managing Life Events

Two major life events that have an immediate impact on benefit enrollments are: getting married or divorced, and giving birth to or adopting a child.

The Life Events transactions can streamline this process for employees by enabling them to update their personal data and then change their benefit enrollments; all from one self-service transaction.

Upon completion of this lesson, you will be able to:
- Manage the marital status life event.
- Manage the birth/adoption life event.
Managing the Marital Status Life Event

You use the **Marital Status Change Life Event** to review current marital status and submit a request to update marital status in the PeopleSoft database. After the status is updated, the Life Event transaction guides you through additional steps for updating personal profile, benefits, and payroll information. Which pages the system displays is determined by the rules set on the **Life Event** page and by the Activity List for the Change Marital Status transaction. Updates to your marital status can also be made through the **Personal Information Home** page.

In this topic, you are going to use the Marital Status Change Life Event to change your marital status from Married to Divorced.

**Procedure**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>Marital Status Change Life Event</strong> page. Click the <strong>Self Service</strong> link.</td>
</tr>
</tbody>
</table>

Click the **Self Service** link.
### Step 2
**Action**: Click the **Benefits** link.

### Step 3
**Action**: Click the **Marriage** link.

### Step 4
**Action**: Use the **Marital Status Change Life Event** page to update your current marital status.

### Step 5
**Action**: The steps involved in this process are displayed in the table at the bottom of the page.

You begin by changing the marital status. Typically when changing your marital status, you also want to update other information like benefits coverage and tax withholding information. The pages in this life event guide you through all the steps necessary to ensure that your personal profile, benefits, and payroll information is updated to reflect your new marital status.
### Step 6

**Click the Start button.**

![Start Button](image)

### Step 7

**Use the Marital Status Change page to begin your life event changes.**
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---

**Step 8.** Begin by entering the change information. First, enter the date of the marital status change. This can be a future, current, or past date. Note that there may be restrictions on when this needs to be completed in order to be eligible to update benefit information.

Click in the **Date Change Will Take Effect** field.

![Date Change Will Take Effect field](image)

**Step 9.** Enter the desired information into the **Date Change Will Take Effect** field. Enter "05/23/2007".

**Step 10.** Use the **Change Marital Status To** field to select your new marital status.

Click the **Change Marital Status To** list.

![Change Marital Status To list](image)

**Step 11.** Click the **Divorced** list item.

![Divorced list item](image)

**Step 12.** Click the **Submit** button to complete the request.

Click the **Submit** button.

![Submit button](image)

**Step 13.** Use the **Submit Confirmation** page to acknowledge that your request was submitted successfully.

---

Page 151
Step 14. Click the **OK** button.

Step 15. The first step is complete and summarized on the page. Notice that the steps are displayed at the top of the page. The current step is active and highlighted.
16. The next step in the process is also active. You can navigate to the next step in one of two ways. Click the active link in the **Marriage Life Event** section or click the **Next** button at the bottom of the page.

   Click the **Next** button.

   ![Marriage Life Event](image)

17. Use the **Benefits Summary** page to review benefit information. If you are eligible to update benefit elections, you can make the necessary changes to your elections by clicking the desired **Type of Benefit** link and making the necessary changes. For this exercise, these changes will not be made until your divorce is final. Continue with the next step.
18. **Click the vertical scrollbar.**

19. **Click the Next button.**

20. **Use the Personal Information page to review and update personal information if necessary. For this exercise, this information will be updated once you divorce becomes final. Continue with the next step.**
## Step 21
Click the **vertical** scrollbar.

## Step 22
Click the **Next** button.

## Step 23
Use the **W-4 Tax Information page** to review and update tax withholding information if necessary.
Step | Action
--- | ---
24. | Click the **vertical** scrollbar.
25. | Click the **Next** button.
26. | Use the **Direct Deposit** page to review and update direct deposit information if necessary.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 27.  | For this exercise, no changes need to be made. Continue with the next step.  
       | Click the **Next** button. |
| 28.  | Use the **Voluntary Deductions** page to review and update voluntary deduction information if necessary. |
## Step 29
For this exercise, no changes need to be made. Continue with the next step.

**Action**

Click the **Next** button.

### Step 30
This page summarizes information that is required by the Benefits department in order to open benefits enrollment for you. Once this is done, you can complete the update to your benefits plans.
31. Click the **Next** button.

32. Use the **Congratulations!** page to confirm the completion of the marital status life event. This page also provides information about additional things to consider when changing your marital status.

33. You have successfully completed the marriage life event. **End of Procedure.**

### Managing the Birth/Adoption Life Event

Employees use the Birth/Adoption transaction whenever they need to change their benefits based on the birth or adoption of a child. Note that you can also add a new spouse and other dependents from the Marriage Life Event.

Once within the transaction, you are presented with a series of pages that will lead you through the life event process. Which pages the system displays is determined by the rules set on the **Life Event** page and by the Activity List for the Birth/Adoption transaction.

In this topic, you have adopted a child and need to enter the adoption information into the system so that the Benefits department can open your benefits enrollment. As part of this process, you will also review current benefits information to prepare for the open enrollment.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Birth and Adoption** page.  
|      | Click the **Self Service** link. |

![Image of a computer screen showing navigation to the Birth and Adoption page.](image-url)
Step | Action
---|---
2. | Click the **Benefits** link.
3. | Click the **Birth/Adoption** link.
4. | Use the **Birth and Adoption** page to enter our new life event or a birth or an adoption of a child.
5. | The steps involved in this process are displayed in the table at the bottom of the page.

You begin by selecting the life event and entering the date of the event. Typically when you adopt or give birth to a child, you also want to update other information like benefits coverage and tax withholding information. The pages in this life event guide you through all the steps necessary to ensure that your personal profile, benefits, and payroll information is updated to reflect the addition of a new dependent to your family.
Step 6. Click the Start button.

Start
7. Begin by entering the birth or adoption information. First, select either birth or adoption. In this exercise, you have adopted a child.

   Click the **Adoption** option.

8. The first step is complete. Notice that the steps are displayed at the top of the page. The current step is active and highlighted. The next step in the process is also active. You can navigate to the next step in one of two ways. Click the active link in the **Birth/Adoption Life Event** section or click the Next button at the bottom of the page.

9. Click the **Next** button.

10. Next, enter the date the child was placed in your home for adoption. Note that there may be restrictions on when this needs to be completed in order to be eligible to update benefit information.

    Click in the **Date** field.

    04/29/2007

11. Enter the desired information into the **Date** field. Enter "04/22/2007".
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Submit</strong> button to complete the update. Click the <strong>Submit</strong> button.</td>
</tr>
<tr>
<td>13.</td>
<td>You are prompted to enter personal information about the new dependent. This information can be entered at a later time and only needs to be complete before adding the dependent to any benefit plans. In this exercise, you do not have all the necessary information (such a Social Security Number) to complete the activity, so this information will not be entered now. Click the <strong>No, I do not want to enter this information now</strong> link.</td>
</tr>
</tbody>
</table>
### Step 14
Your initial steps are complete and summarized on the page.

Click the **Next** button.

---

### Step 15
Use the **Benefits Summary** page to review benefit information. If you are eligible to update benefit elections, you can make the necessary changes to your elections by clicking the desired **Type of Benefit** link and making the necessary changes. For this exercise, these changes will be made once you are eligible for open enrollment. Continue with the next step.
### Step 16
Click the **vertical** scrollbar.

### Step 17
Click the **Next** button.

### Step 18
Use the **Dependent and Beneficiary Coverage Summary** page to view a summary of your current dependent and beneficiary coverage. You can review this information to determine what you might want to change in existing coverage due to the addition of a new dependent. Continue with the next step.
Step | Action
---|---
19. | Click the **vertical** scrollbar.
20. | Click the **Next** button.
21. | Use the **W-4 Tax Information** page to review and update tax withholding information if necessary.
22. Click the **vertical** scrollbar.

23. Click the **Next** button.

24. Use the **Direct Deposit** page to review and update direct deposit information if necessary.
25. For this exercise, no changes need to be made. Continue with the next step.

   Click the **Next** button.

26. Use the **Voluntary Deductions** page to review and update voluntary deduction information.
Step 27. For this exercise, no changes need to be made. Continue with the next step.

Click the Next button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 28.  | The last step is to prepare benefit options for open enrollment.  
      | Click the **Yes, I'd like to prepare my benefit options now** link. |
      | [Yes, I'd like to prepare my benefit options now](#) |
29. **Click the Prepare my Benefit Options button.**

   ![Prepare my Benefit Options](image)

   Prepare my Benefit Options

---

30. **Click the Cancel button.**

   ![Cancel](image)

   Cancel
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Step 31.
Click the Click here to continue with your Life Event link.

Click here to continue with your Life Event
### Step 32
- Click the **Next** button.

### Step 33
- Use the **Congratulations!** page to confirm the completion of the birth/adoptive life event. This page also provides information about additional things to consider when you have a new child.

### Step 34
- You have successfully completed the birth/adoptive life event.
  - **End of Procedure**.