City of Minneapolis

PeopleSoft HCM/ELM v9.2 Upgrade

BENEFITS EMPLOYEE SELF-SERVICE:
STEP-BY-STEP INSTRUCTIONS

Benefits

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Benefits

View Health Care Benefits

Health Care Summary
Review a summary of your health care enrollments.

Menu Path: *Click Employee Self Service tab > Benefits link > Benefits Information link > Health Care Summary link*

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

06/01/2015 Go

Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
Medical	Essential Wellness Btax	Single
Dental	Delta Dental Plan of MN	Family

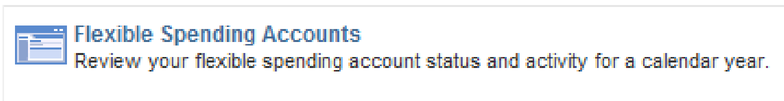
Go to
Health Care Dependent Summary

Procedure

Step	Action
1.	Click the **Health Care Summary** link. Health Care Summary
2.	Click the **Choose a date (Alt+5)** button.
3.	Click the desired date. 31
4.	Click the **Go** button. Go
5.	Click the **Medical** link. You will be provided with a list of enrollments in effect as of the date provided. Each benefit plan type will be listed, along with the description of the plan and coverage level. Medical

Step	Action
6.	The highlighted 'benefit plan name' can also be a link to the provider's website, where you can located a physician or clinic by location or specialty, and view claims in process or paid. Click the **Return to Health Care Summary** link. Return to Health Care Summary
7.	Click the **Dental** link. You will be provided with a list of enrollments in effect as of the date provided. Each benefit plan type will be listed, along with the description of the plan and coverage level. Dental
8.	When you are on the **Health Care Summary Page**, you can click on the Dependent Health Care Summary link at the bottom of the page to view enrolled dependents. If you click on the highlighted dependent name, you will see a summary of their personal data. Click the **Return to Health Care Summary** link. Return to Health Care Summary
9.	Click the **Health Care Dependent Summary** link. Health Care Dependent Summary
10.	Click the **Return to Health Care Summary** link. Return to Health Care Summary
11.	 **End of Procedure.**

Flexible Spending Accounts



Menu Path: *Click Employee Self Service tab > Benefits link > Benefits Information link > Flexible Spending Accounts link*


Flexible Spending Accounts

Your Flexible Spending Account(s) in 2015

Select Plan Year

You may review your Flexible Spending Account status and activity for any plan year.
Reminder: Claims are reported in the Plan Year for which the services were rendered, regardless of when the expense was paid or when the claim was processed.

To review past benefits information, enter the year and select the Go button.

Year 2015 (YYYY) Go

Select Account

For this Plan Year you are enrolled in the Flexible Spending Account(s) listed on the page.
Please select the one you wish to review.

Enrollment Details

Spending Account	Annual Pledge	Contributions YTD	Claims Submitted	FSA Claims Approved	Claims Paid YTD
City Health Care Spending Acct	840.00	280.00	0.00	0.00	0.00

Procedure

Step	Action
1.	Click the **Flexible Spending Accounts** link. Flexible Spending Accounts
2.	The **Year d**efaults to the current year. To view past benefits information, enter the year and select the **Go** button. Click in the **Year** field. 2015
3.	Click the **Go** button. Go
4.	Click the **City Health Care Spending Acct** link.
5.	The **Flexible Spending Account Review** page displays account summary information.
6.	Click the **Close** button. Close

Step	Action
7.	Click the **Home** link. 
8.	**End of Procedure.**

Dependent/Beneficiary Personal Information

Dependent/Beneficiary Info
Review or update dependent and beneficiary information.

Menu Path: *Click Employee Self Service tab > Benefits link > Dependent/Beneficiary Info link*

The people listed may be eligible for Benefit Coverage. Select a name to view or modify personal information. To add a dependent or beneficiary, select the 'Add a dependent or beneficiary' pushbutton.

Dependent and Beneficiary Information

Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled	Dependent	Beneficiary
		11/08/1963	Single		No	☐	No	Yes
		11/08/1963	Married	10/31/2014	No	☐	Yes	Yes

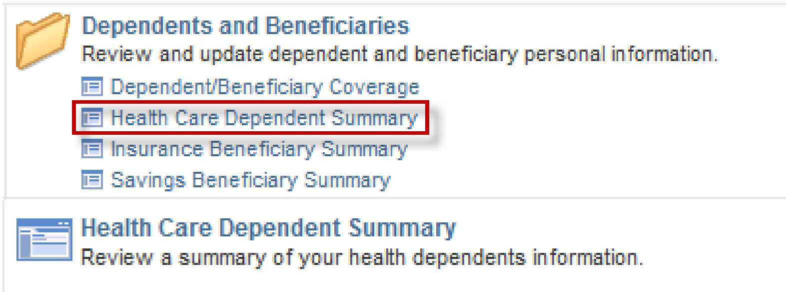
Dependent/Beneficiary Coverage Summary

Procedure

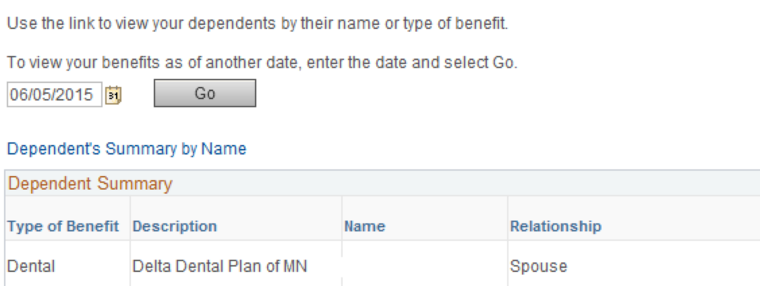
Step	Action
1.	Click the **Dependent/Beneficiary Coverage** link. Dependent/Beneficiary Coverage
2.	To view your benefits as of another date, enter the date and select 'Go'. Click the **Choose a date (Alt+5)** button. 31
3.	Click the desired date. 31
4.	Click the **Go** button. Go
5.	Click the **Dependent/Beneficiary Name** link.
6.	Dependent/Beneficiary Personal Information can be modified. Click the **Edit** button. Edit
7.	When Dependent/Beneficiary Personal Information changes have been made, scroll to the bottom of the page. Click the **Save** button. Save
8.	Click the **Return to Dependent and Beneficiary Coverage Summary** link. Return to Dependent and Beneficiary Coverage Summary
9.	Click the **Dependent/Beneficiary Summary** link. Dependent/Beneficiary Summary

Step	Action
10.	**End of Procedure.**

Health Care Dependent Summary



Menu Path: *Click Employee Self Service tab > Benefits link > Dependents and Beneficiaries link > Health Care Dependent Summary link*

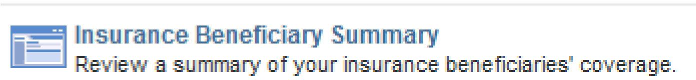


Procedure

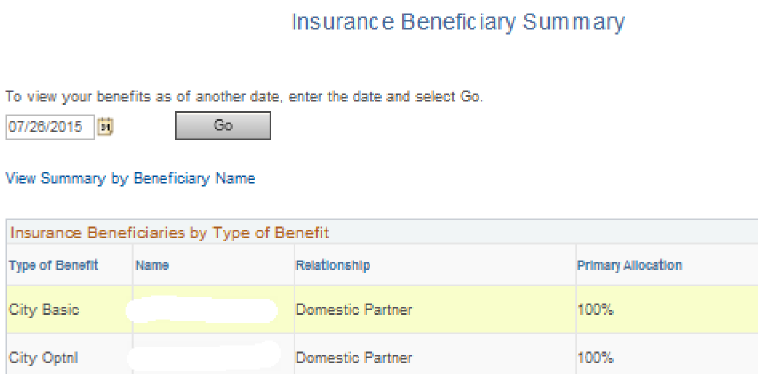
Step	Action
1.	Click the **Dependents and Beneficiaries** link. Dependents and Beneficiaries
2.	Click the **Health Care Dependent Summary** link. Health Care Dependent Summary
3.	To view your benefits as of another date, enter the date and select 'Go'. Click the **Choose a date (Alt+5)** button.
4.	Click the desired date. 5
5.	Click the **Go** button. Go
6.	Click the Name link of a dependent under the Dependent Summary Section to view additional information.
7.	Click the **Edit** button. Edit

Step	Action
8.	Changes to dependent information can be made on this screen. Click the **Save** button. 
9.	Click the **Return to Health care dependent summary** link. 
10.	**End of Procedure.**

Insurance Beneficiary Summary



Menu Path: *Click Employee Self Service tab > Benefits link > Dependents and Beneficiaries link > Insurance Beneficiary Summary*



Insurance Beneficiaries by Type of Benefit

Type of Benefit	Name	Relationship	Primary Allocation
City Basic		Domestic Partner	100%
City Optnl		Domestic Partner	100%

Procedure

Step	Action
1.	Click the **Dependents and Beneficiaries** link. Dependents and Beneficiaries
2.	Click the **Insurance Beneficiary Summary** link. Insurance Beneficiary Summary
3.	To view your benefits as of another date, enter the date and select 'Go'. Click the **Choose a date (Alt+5)** button. 31
4.	Click the desired date. 4
5.	Click the **Go** button. Go

Step	Action
6.	Click the Name link of a dependent under the Insurance Beneficiaries by Type of Benefits Section to view additional information. Click the **<LastName,FirstName>** link.
7.	Information for the beneficiary is displayed. Click the **Edit** button. Edit
8.	Changes to Dependent/Beneficiary Personal Information can be made on this screen. Click the **Save** button. Save
9.	Click the **Return to View All Benef Allocations** link. Return to View All Benef Allocations
10.	 **End of Procedure.**

Benefits Summary

Benefits Summary
Review a summary of current, past or future benefit enrollments.

Menu Path: *Click Employee Self Service tab > Benefits link > Benefits Summary link*

Benefits Summary

To view your benefits as of another date, enter the date and select Go.
07/26/2015 Go

Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
Medical	Essential Wellness Btax	Single
Dental	Delta Dental Plan of MN	Family
City Basic Life	Employer Paid Life Insurance	Salary X 1
City Optional Life	Employee Paid 1 X Salary Prtax	Salary X 1
City Dependent Life		Waived
Long-Term Disability	Employer Paid LTD	60% of Salary
Sick	City Sick Plan 2	- - - - -
Vacation	Appt. 20 day accumulation	- - - - -
Compensatory Time	Generic (all) Comp Plan	- - - - -
Health Care Spending Account	City Health Care Spending Acct	$840 Pledge
Dependent Daycare Spnd Account		Waived
Pension	PERA Coordinated Retirement Pln	6.5% of Earnings

Go to Enroll in Benefits

Procedure

Step	Action
1.	Click the **Benefits Summary** link. Benefits Summary
2.	The **Benefits Summary** page displays benefits as of today's date. To view benefits as of another date, enter the date and select the **Go** button. Click the **Choose a date (Alt+5)** button. 31
3.	Click the desired date. 26
4.	Click the **Go** button. Go

Step	Action
5.	In the Benefits Summary section, additional information about Medical can be displayed. Click the **Medical** link. Medical
6.	Medical information is displayed. Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary
7.	In the Benefits Summary section, additional information about Dental can be displayed. Click the **Dental** link. Dental
8.	Dental information is displayed. Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary
9.	In the Benefits Summary section, additional information about City Basic Life can be displayed. Click the **City Basic Life** link. City Basic Life
10.	The **City Basic Life** page is displayed. In the Dep/Ben Coverage Details section, select a dependent/beneficiary. Click the **<LastName,FirstName>** link.
11.	The **Dependent/Beneficiary Personal Information** page displays. Personal information can be modified by selecting the **Edit** button. Click the **Edit** button. Edit
12.	Make any changes to Dependent/Beneficiary Info before saving. Click the **Save** button. Save
13.	Click the **Return to Life Insurance Main** link. Return to Life Insurance Main
14.	Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary

Step	Action
15.	Click the **City Optional Life** link. City Optional Life
16.	The **City Optional Life** page displays optional life coverage and covered dependents/beneficiaries, which can be edited. Click the **Edit** button. Edit
17.	The **Change Current Beneficiaries and Allocations** page displays. Click in the **New Primary Allocation** field.
18.	Primary and Secondary allocations can be made in the Allocation Details section. Enter the desired information into the **New Primary Allocation** field.
19.	Click the **Update Totals** button. Update Totals
20.	Changes must be saved. Click the **Save** button. Save
21.	The **Save Confirmation** page displays. Click the **OK** button. OK
22.	Click the **Return to Life Insurance Main** link. Return to Life Insurance Main
23.	Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary
24.	Click the **Long-Term Disability** link. Long-Term Disability
25.	The **Long-Term Disability** page displays plan information. Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary
26.	Click the **Health Care Spending Account** link. Health Care Spending Account
27.	The **Flexible Spending Account Review** page displays an Account Summary.
28.	Click the **Close** button. Close

Step	Action
29.	Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary
30.	Click the **Home** link. Home
31.	**End of Procedure.**

Insurance Summary

Insurance Summary
Review a summary of your life and AD&D insurance.

Menu Path: *Click Employee Self Service tab > Benefits link > Insurance Summary link*

Insurance Summary

To view your benefits as of another date, enter the date and select Go.
07/26/2015 Go

Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
City Basic Life	Employer Paid Life Insurance	Salary X 1
City Optional Life	Employee Paid 1 X Salary Prtax	Salary X 1
City Dependent Life		Waived
Long-Term Disability	Employer Paid LTD	60% of Salary

Go to
Insurance Beneficiary Summary

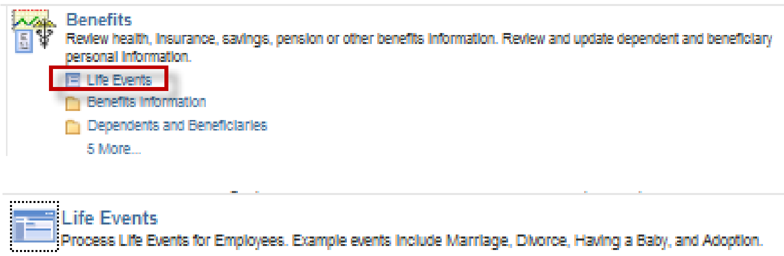
Procedure

Step	Action
1.	Click the **Insurance Summary** link. Insurance Summary
2.	To view benefits as of another date, enter the date and select the **Go** button. Click the **Choose a date (Alt+5)** button.
3.	Click the desired date. 26
4.	Click the **Go** button. Go
5.	Click the **City Basic Life** link. City Basic Life

Step	Action
6.	The **City Basic Life** page displays life insurance information and covered beneficiaries. Under the Dep/Ben Coverage Details section, select a dependent/beneficiary. Click the **<LastName,FirstName>** link.
7.	The **Dependent/Beneficiary Info** page displays. Information can be modified by selecting the **Edit** button. Click the **Edit** button. Edit
8.	Click the **Save** button. Save
9.	Click the **Return to Life Insurance Main** link. Return to Life Insurance Main
10.	Click the **Return to Insurance Summary** link. Return to Insurance Summary
11.	Click the **City Optional Life** link. City Optional Life
12.	The **City Option Life** page displays coverage information and covered beneficiaries. Click the **Edit** button. Edit
13.	The **Change Current Beneficiaries and Allocations** page displays. New or additional beneficiaries can be added. Click the **Add a New Beneficiary** button. Add a New Beneficiary
14.	The **Dependent/Beneficiary Personal Information** page displays. Under the Personal Information section, **First Name, Last Name, Gender** and **Relationship to Employee** are required fields.
15.	Click the **Save** button. Save
16.	The **Save Confirmation** page displays. Click the **OK** button. OK
17.	Click the **Return to Change Current Beneficiaries and Allocations** link. Return to Change Current Beneficiaries and Allocations

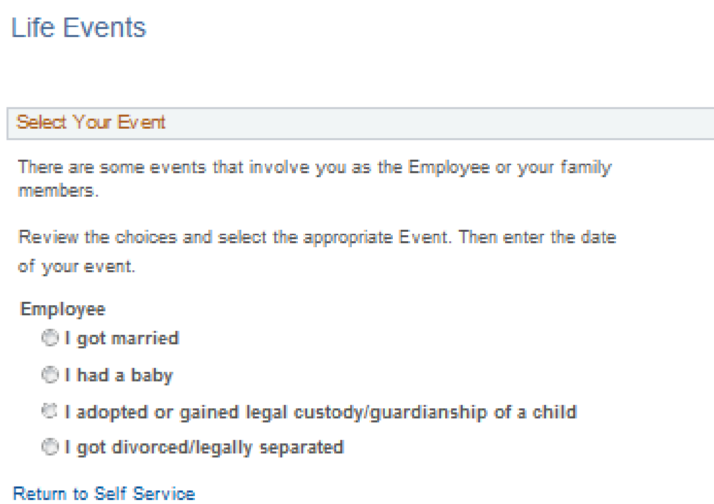
Step	Action
18.	**New Primary Allocations** and/or **New Secondary Allocations** need to be updated, and must total 100%. Click in the **New Primary Allocation** field.
19.	Enter the desired information into the **New Primary Allocation** field.
20.	Click the **Update Totals** button. Update Totals
21.	Click the **Save** button. Save
22.	The **Save Confirmation** page displays. Click the **OK** button. OK
23.	Click the **Return to Life Insurance Main** link. Return to Life Insurance Main
24.	Click the **Return to Insurance Summary** link. Return to Insurance Summary
25.	Click the **Long-Term Disability** link. Long-Term Disability
26.	The **Long-Term Disability** page displays information for this benefit. Click the **Return to Insurance Summary** link. Return to Insurance Summary
27.	Click the **Insurance Beneficiary Summary** link. Insurance Beneficiary Summary
28.	Click the **Return to Insurance Summary** link. Return to Insurance Summary
29.	Click the **Home** link. Home
30.	**End of Procedure.**

Life Events



Menu Path: *Click Employee Self Service tab > Benefits link > Life Events link*

> **Entering of life events online has not yet implemented**.
> Please complete a Health Plan Enrollment/Change form and
> Beneficiary Designation form
> Return the forms to the Human Resources-Benefits department.



Note: Several employee Life Events are displayed as options on the "Life Events" page. The step-by-step instructions in the following are for the adoption or gained legal custody/guardianship of a child, although the processes for other Live Events are quite similar.

Procedure

Step	Action
1.	Click the **Self Service** link. 
2.	Click the **Benefits** link. 

Step	Action
3.	Click the **Life Events** link. Life Events
4.	Click the **I adopted or gained legal custody/guardianship of a child** option. I adopted or gained legal custody/guardianship of a child
5.	Enter the **Status Change Date** into the "**Date Change Will Take Effect**" field. Click the **Choose a date (Alt+5)** button.
6.	Click the desired date. 19
7.	Click the **OK** button. OK
8.	**The Welcome to the Adoption Event** page displays. Additional information for the Life Event (in this case an Adoption Event) will be captured in eBenefits. Click the **Next** button. Next
9.	Click in the **Date child was placed in your home for adoption:** field. This date defaults to the **Change Status Date** specified on the previous page. However, this date can be modified. 07/19/2015
10.	Click the **Submit** button. Submit
11.	The Submit Confirmation page displays. Click the **OK** button. OK
12.	The **Adoption Date** page displays, with the Adoption Date specified from the previous page. Click the **Next** button. Next
13.	The **Life Events - Document Upload** page displays. Under the Life Event Documents section, documents pertaining to the Life Event can be uploaded. Click the **Look up Select a document (Alt+5)** button.

Step	Action
14.	Select a document **(Authorization Entry ID)**. Click the **BN_ADOPTCERT** link.
15.	Click the **Add Attachment** button.
16.	The **Document Definition - New Attachment** page displays. Click in the **Subject** field.
17.	Enter the desired information into the **Subject** field.
18.	Click the **Add Attachment** button.
19.	Click in the **Upload** field.
20.	Click the **Adoption Paperwork** list item.
21.	Click the **Open** object.
22.	Click the **Upload** button.
23.	To confirm the proper document was selected, you can view the document that was attached. Click the **View Attachment** button.
24.	The attachment is opened as a PDF file in another browser. Close the browser containing the attachment and return to the Life Event browser (**Document Upload** tab). Click the **Document Upload** tab.
25.	Click the **Save** button.
26.	The attached document is displayed on the **Life Events - Document Upload** page. Click the **Next** button.

Step	Action
27.	The **Benefits Summary** page displays. This date defaults to the **Change Status Date** specified on the Adoption Date Page. However, this date can be modified. Click in the **Calendar** field. 07/19/2015
28.	Click the **Go** button. Go
29.	Under the Benefits Summary section, select any of the **'Type of Benefit'** hyperlinks (Medical, Dental, City Basic Life, etc.) to view your current coverages. Click the **Next** button. Next
30.	The **Dependent and Beneficiary Coverage Summary** page appears. This date defaults to the **Change Status Date** specified on the Adoption Date Page. However, this date can be modified. Click in the **Calendar** field. 07/19/2015
31.	Click the **Go** button. Go
32.	Under Dep/Ben Details, select any of the **'Dependent/Beneficiary Name'** hyperlinks for and dependents listed to view current dependent details. Click the **Next** button. Next
33.	The **Add/Review Dependent/Beneficiary** page displays. Click the **Add a dependent or beneficiary** button. Add a dependent or beneficiary
34.	**"First Name", "Last Name", "Gender"** and **"Relationship to Employee"** are required fields in the Personal Information section. Click in the **First Name** field.
35.	Enter the desired information into the **First Name** field. Enter "**Jim**".
36.	Click in the **Last Name** field.
37.	Enter the desired information into the **Last Name** field. Enter "**Smith**".

Step	Action
38.	Click the **Gender** list. Male
39.	Click the **Male** list item. Male
40.	Click the **Relationship to Employee** list.
41.	Click the list.
42.	Click the **Son** list item. Son
43.	By default, the **"Same Address as Employee"** field is selected. If the address of the dependent/beneficiary is different, then deselect this option and enter the appropriate address information. Click the **Same Address as Employee** option. Same Address as Employee
44.	Click the **Save** button. Save
45.	The **Save Confirmation** page displays. Click the **OK** button. OK
46.	Click the **Next** button. Next
47.	The **W-4 Tax Information** page displays. Any changes to W-4 Information, such as number of allowances, exemption conditions, etc., can be made on this page.
48.	Click the **Submit** button. Submit
49.	Click in the **Password** field.
50.	Enter your HRIS password to confirm W-4 changes. Enter the desired information into the **Password** field.
51.	Click the **Continue** button. Continue

Step	Action
52.	The **Submit Confirmation** page displays. Click the **OK** button.
53.	W-4 changes are displayed. Click the **Next** button.
54.	The **Direct Deposit** page displays. Updates to direct deposit details can be made on this page. Click the **Next** button.
55.	The **Benefit Enrollment** page displays. Click the **Start My Enrollment** button.
56.	Under the Open Benefit Related Events section, select the appropriate Event Description for benefits enrollment. Click the **Select** button.
57.	The **Benefits Enrollment - Adoption** page displays.
58.	The **Benefits Enrollment - Adoption Event** page displays. Changes to any benefit coverages can be made on this page by selecting the **"Edit"** button for a particular coverage. Select the **"I Have No Changes"** button if the Life Event doesn't require any benefit changes. If changes to benefit coverages have been made, then select the **"Submit"** button. Click the **I Have No Changes** button.
59.	The **Benefits Enrollment - Submit Benefit Choices** page appears. Click the **Submit** button.
60.	The **Submit Confirmation** page displays. Click the **OK** button.

Step	Action
61.	Click the **Next** button. 
62.	The **Benefits Election Review** page displays, showing Personal Information, Dependent Information and Your Benefit Choices. Click **Print** to print this information. Click the **Print** button. 
63.	Click the **Next** button. 
64.	**The Event Completion and Exit** page displays. Clicking the **Complete** button will end this Life Event session. Click the **Complete** button. 
65.	Click the **Home** link. 
66.	**End of Procedure.**