

CLARK COUNTY SCHOOL DISTRICT
BUSINESS AND FINANCE DIVISION
TECHNOLOGY & INFORMATION SYSTEMS SERVICES DIVISION
USER SUPPORT SERVICES
EMPLOYEE BUSINESS TRAINING DEPARTMENT



PeopleSoft-HCM:
ESS–Life Events

Revised: August 2020

Life Events Options

Life Events permit employees to initiate changes to benefits which involve themselves and their dependents.

After selecting the **Benefit Details** tile from the **Employee Self Service** dashboard, click the **Life Event** option from the left side panel to display the **Life Event** page.

The screenshot shows the 'Employee Self Service' interface. The top navigation bar includes a back arrow, 'Employee Self Service', and 'Benefit Details'. The user is identified as 'Hill, Christine' with 'ADMIN SCH SEC' status. The left sidebar contains a menu with 'Life Events' highlighted. The main content area is titled 'Life Events' and includes a red heading 'For Health Insurance Changes Only'. Below this is a text box explaining that events involve the employee or family members and that users should review choices and enter event dates. A list of events is provided with radio buttons: 'Upload Supporting Documentation', 'Marriage', 'Birth of a Child', 'Adopted or Gained Legal Custody/Guardianship of a child', 'Divorce or Legal Separation', 'Gained Coverage Elsewhere', 'Loss of Coverage Elsewhere', 'Add a Domestic Partner', 'Remove a Domestic Partner', and 'Death of a Dependent'. An '*As Of' date field with a calendar icon and a 'Start Life Event' button are at the bottom. A footer note states: 'The Life Event must be completed within 31 days of your qualifying event or you will not be eligible to change your Benefit elections.'

Select the type of **Life Event** to process from the list. The life event must be completed within 31 days of the event. If more than 31 days has passed, the employee will not be allowed to enter a **Life Event**, and will need to wait until the next Open Enrollment period to make changes to their benefits.

After selecting the **Life Event**, enter the ***As Of** date and click the **Start Life Event** button. (**Please note:** The ***As Of** date must be the *exact* date of the birth, marriage, etc.) A list of steps to be completed will appear on the left, and Previous and Next buttons will appear in the top right corner for navigation. (Please note that all supporting documents must be available for upload prior to completion of the **Life Event**.) The event may be exited and the progress saved so it can be completed at a later time. However, the employee will not be able to begin another **Life Event** until the current event, which will show as being in progress, is completed.

Note: Only one **Life Event** at a time is allowed. To cancel a **Life Event**, click the **Continue Life Event** button, then click the **Action List** (3 vertical dots - upper right corner), and select **Cancel**.

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Life Event - Marriage Example

This example shows how to complete the Marriage Life Event. Most other Life Events will follow similar steps.

1. Select **Life Events** from the menu on the left and then select the “**Marriage**” radio button.
2. Enter the date of the Life Event in the **As Of** date field.
3. Click the **Start Life Event** button. (This button becomes active once date has been entered.)

The screenshot shows the 'Employee Self Service' interface. On the left, a navigation menu has 'Life Events' highlighted with a blue circle and a '1' callout. The main content area is titled 'Benefit Details' and shows the user's name 'Hill, Christine' and 'ADMIN SCH SEC'. Under 'Life Events', there is a red heading 'For Health Insurance Changes Only' and a paragraph: 'There are some events that involve you as the Employee or your family members. Review the choices and select the appropriate Event. Then enter the date of your event.' Below this is a list of events with radio buttons: 'Marriage' is selected with a blue circle and a '2' callout. Other events include 'Upload Supporting Documentation', 'Birth of a Child', 'Adopted or Gained Legal Custody/Guardianship of a child', 'Divorce or Legal Separation', 'Gained Coverage Elsewhere', 'Loss of Coverage Elsewhere', 'Add a Domestic Partner', 'Remove a Domestic Partner', and 'Death of a Dependent'. Below the list is an '*As Of' date field with a calendar icon and a '2' callout. At the bottom, the 'Start Life Event' button is highlighted with a blue circle and a '3' callout. A note at the bottom states: 'The Life Event must be completed within 31 days of your qualifying event or you will not be eligible to change your Benefit elections.'

4. The system will display the **Welcome to Marital Event** page. To continue the event, click the **Next** button.

The screenshot shows the 'Welcome to Marital Event' page. The page title is 'Marriage Event' and the user's name is 'CHRISTINE HILL'. The page contains a paragraph: 'A marital status change is a good time to reconsider your health care coverage, tax withholdings, and other important information. This guide will take you through all the steps necessary to ensure that your personal profile, benefits, and payroll information are updated to reflect this event in your life.' On the left, there is a navigation menu with the following items: 'Welcome to Marital Event' (Complete), 'Marital Status' (Not Started), 'Document Upload' (Not Started), 'Fluid Benefit Enrollment' (Not Started), 'Benefits Statements' (Not Started), and 'Summary' (Not Started). The 'Next' button is highlighted with a blue circle and a '4' callout.

5. Select **Married** from the drop-down list.
6. Enter the **Marriage Date**.
7. Once the Marital Status and the Marriage Date have been entered, click the **Save** button.
The system will display a message that the page has been successfully saved.
8. To continue the event, click the **Next** button.

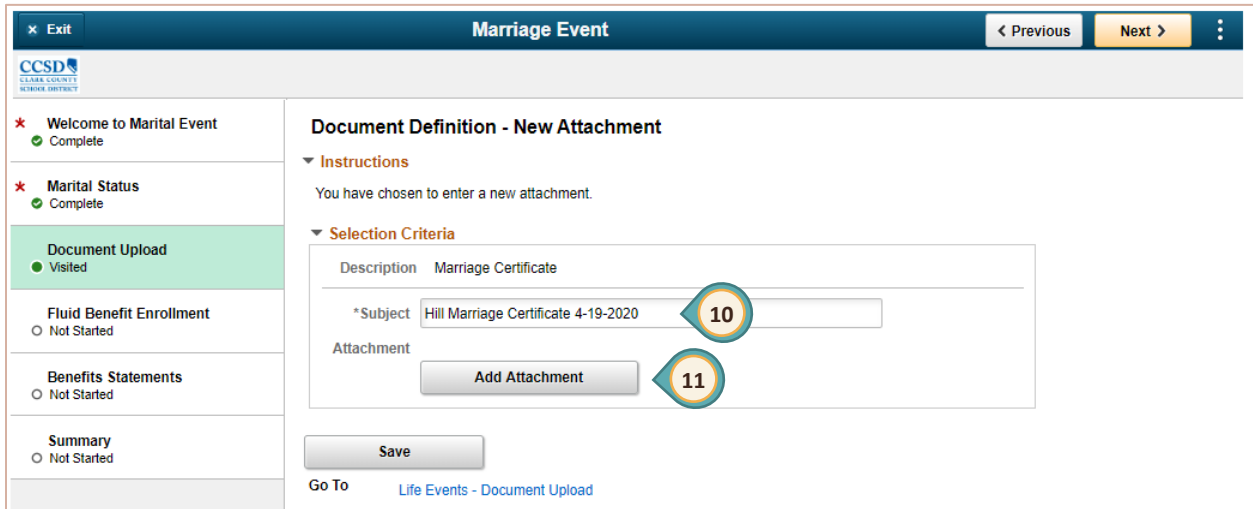
The screenshot shows the 'Marriage Event' form. On the left, a navigation pane lists: 'Welcome to Marital Event' (Complete), 'Marital Status' (In Progress), 'Document Upload' (Not Started), 'Fluid Benefit Enrollment' (Not Started), 'Benefits Statements' (Not Started), and 'Summary' (Not Started). The main content area is titled 'Marital Status' and shows 'Current Single'. Below this is a section 'Change Marital Status' with a dropdown menu for '*New Status' set to 'Married' and a date field for '*As Of' set to '04/19/2020'. A green 'Save' button is to the right. At the top right, there are 'Previous' and 'Next >' buttons. Callout boxes 5, 6, 7, and 8 point to the dropdown, date field, Save button, and Next button respectively.

9. Review the **Instructions** provided on the page to upload the required documents then select the **Add Attachment** button.

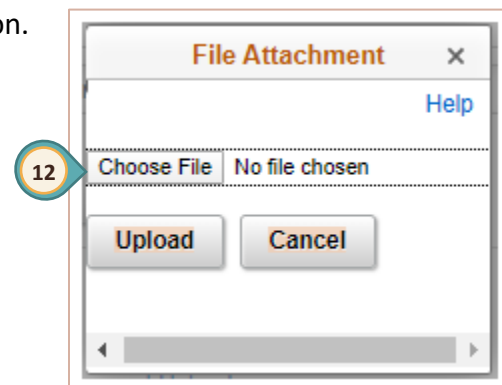
The screenshot shows the 'Life Events - Document Upload' section. The left navigation pane now highlights 'Document Upload' (Visited). The main content area has a section titled 'Life Events - Document Upload' with a sub-section 'Instructions' that reads: 'You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.' Below this is a section 'Life Event Documents' with a list containing 'Marriage Certificate'. At the bottom, there are 'Add Attachment' and 'Add Note' buttons. Callout box 9 points to the 'Add Attachment' button.

Please note that required supporting documentation (e.g., birth certificate, marriage certificate, divorce decree, or other court document) depends upon the type of life event selected.

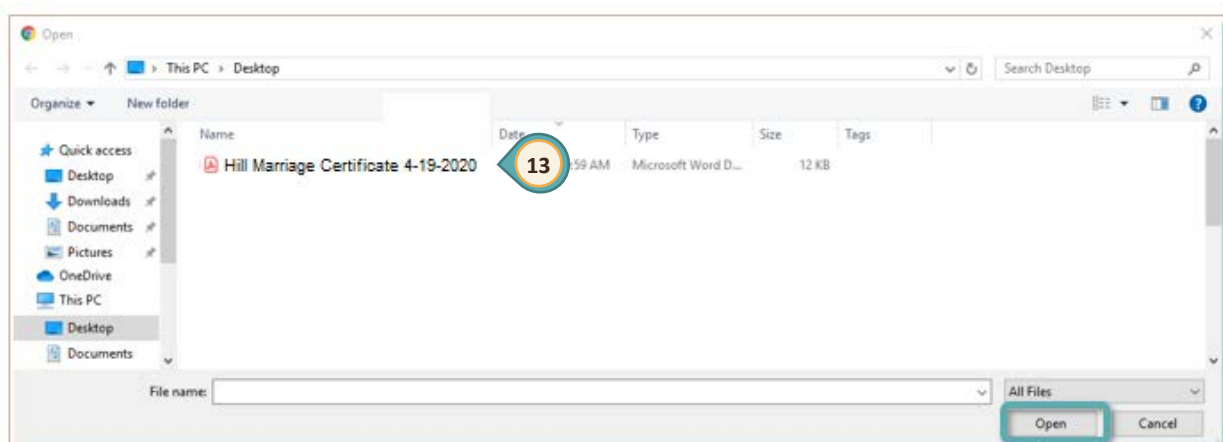
10. In the new window, enter the document title in the **Subject** line. A sample **Subject** line would be **Marriage Certificate** and the date.
11. Click the **Add Attachment** button.



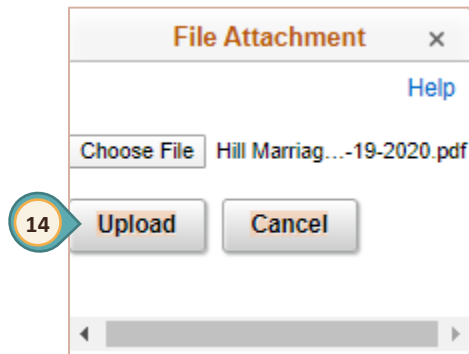
12. In the new window, select the **Choose File** button.



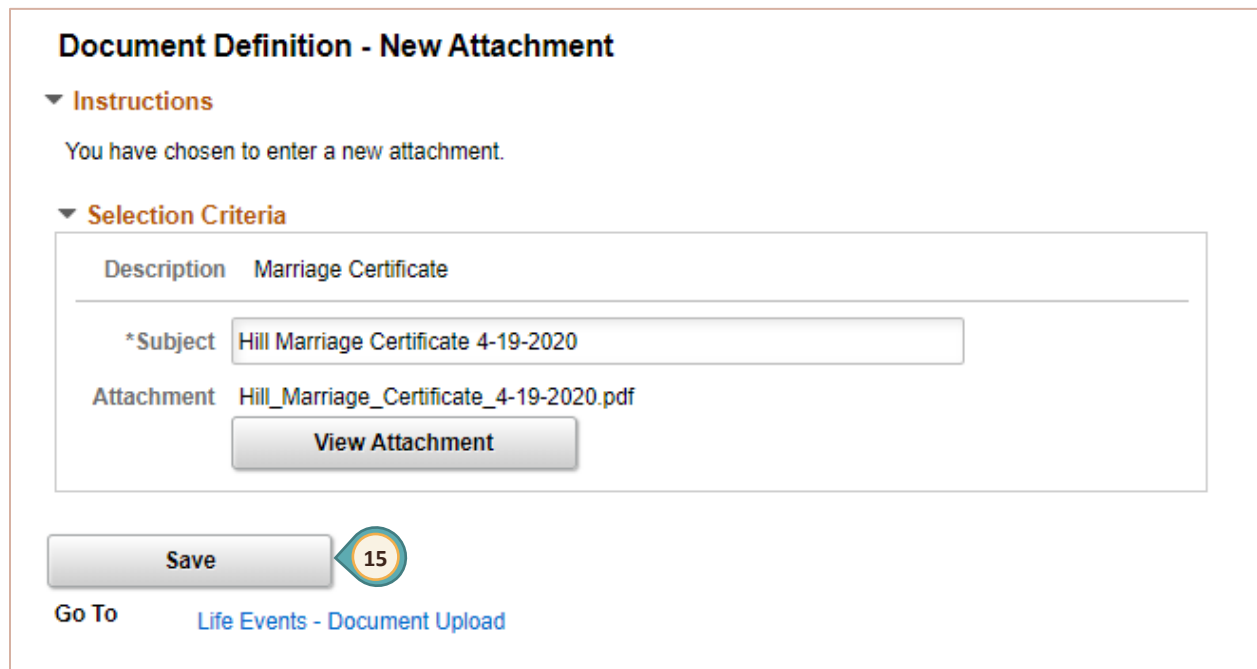
13. Navigate to the **desired file name**, select it, and then click the **Open** button.



14. The selected file is displayed and is ready to be uploaded. Click the **Upload** button to upload the displayed file.



15. When the file has been uploaded, it will be displayed on the page. The **View Attachment** button can be selected to confirm the correct attachment was uploaded if desired. Click the **Save** button.



16. The **Life Events – Document Upload** page now displays the attachment and its status. Click the **Add Attachment** button to upload additional documents if needed. Click the **Add Note** button to enter comments about the event or the documentation that has been provided if needed. If the wrong document was uploaded, click the checkbox next to the file name and then click the **Delete** button.

Life Events - Document Upload

Instructions
 You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.

Life Event Documents

Marriage Certificate

Add Attachment Add Note

Attachments

Select	Sequence	Created	Author	Entry ID	Subject	Status
<input type="checkbox"/>	1	04/21/2020 2:30PM	CHRISTINE HILL	Marriage Certificate	Hill Marriage Certificate 4-19-2020	Submitted

Select All Deselect All
 Delete

17. Select the **Next** button.

Document Upload

Next >

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18. The **Fluid Benefit Enrollment** page will be displayed. Select the **Start My Enrollment** button to continue.

Marriage Event

Fluid Benefit Enrollment

Now we're ready to prepare your benefit options, based upon the Life Event information that you've entered. Your information will be analyzed to see if there is any impact to your eligibility for benefits, and determine whether changes to your existing enrollments are allowed. Select the 'Start My Enrollment' pushbutton to begin your benefit enrollment.

Start My Enrollment

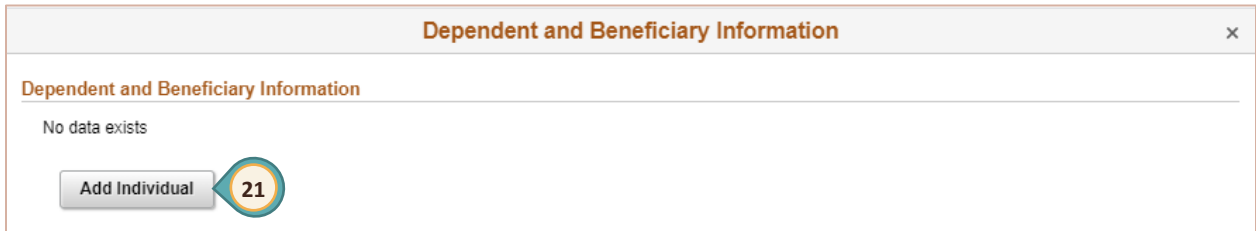
18

19. The **Fluid Benefit Enrollment Overview** page lists the current benefits. Click the **Health** box at the bottom of the page to review & make changes to the current health plan (e.g., adding spouse).

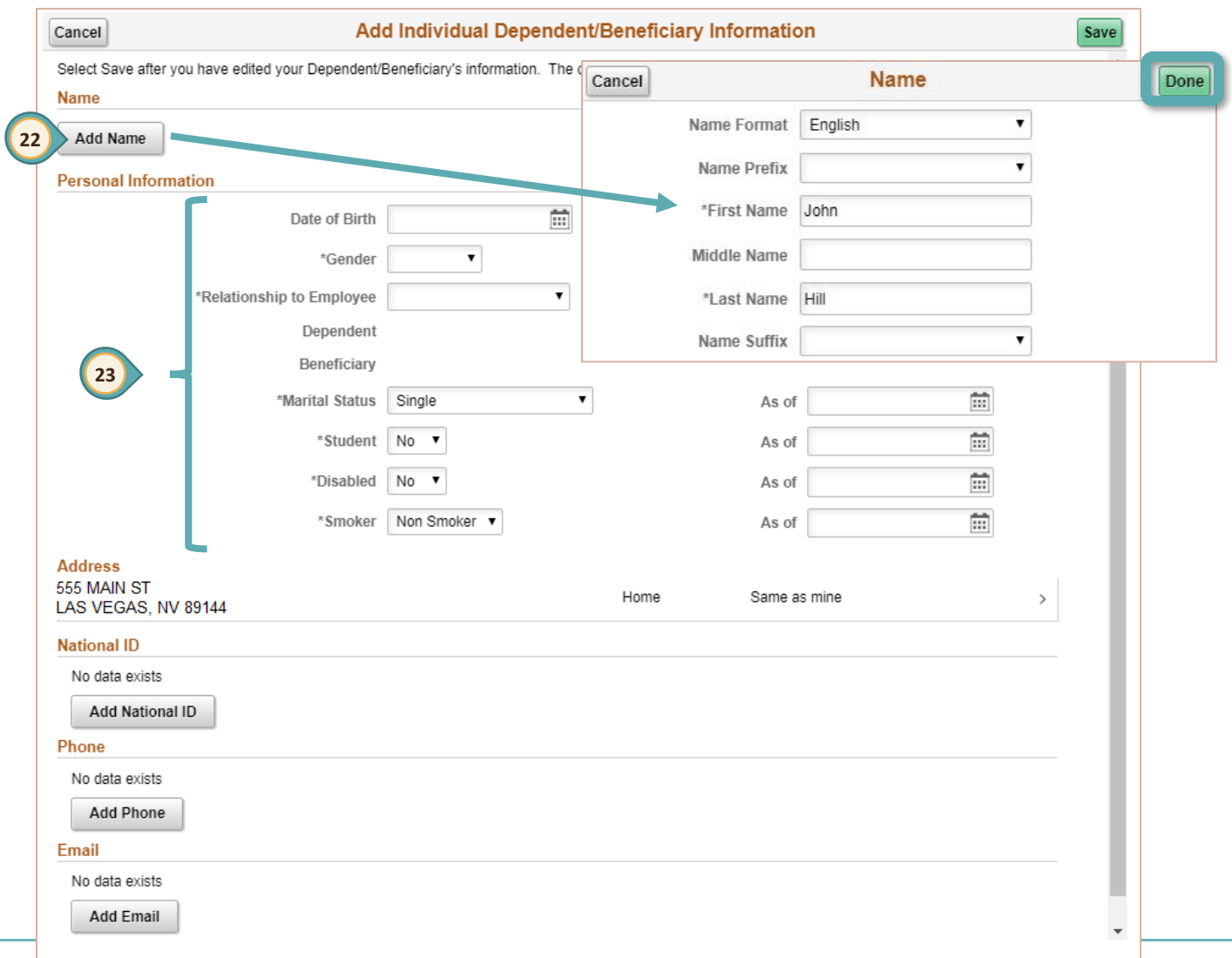
20. To add a Dependent, click the **Add Dependent** button.

	Plan Name	Cost (Before Tax)	Cost (After Tax)	Pay Period Cost
Select	HMO - Support Professionals	\$21.13		\$21.13
✓	Point of Service - Support Pro	\$101.82		\$101.82
Select	PPO - Support Professionals	\$111.07		\$111.07
Select	HMO After-Tax - Support Prof		\$21.13	\$21.13
Select	POS After-Tax Support Prof		\$101.82	\$101.82
Select	PPO - After Tax Support Prof		\$111.07	\$111.07
Select	Waive			\$0.00

21. In the new window, select the **Add Individual** button to add a Dependent or Beneficiary. A new window will appear to enter the information.



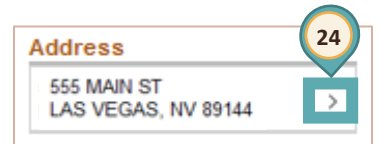
22. Click the **Add Name** button to enter the Dependent/Beneficiary name. A new window will appear to enter the person's name. Click the **Done** button to return to the previous page.



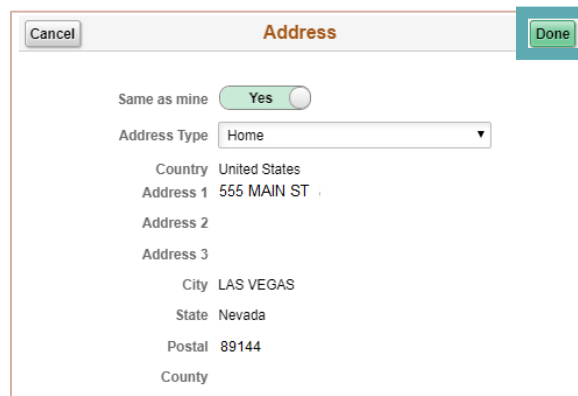
23. In the **Personal Information** section, enter the following:

- Date of Birth
- Gender
- Relationship to the Employee
- Marital Status
- Status for Student, Disabled, Smoker fields

24. In the address field, click the > right arrow to enter the person's address.

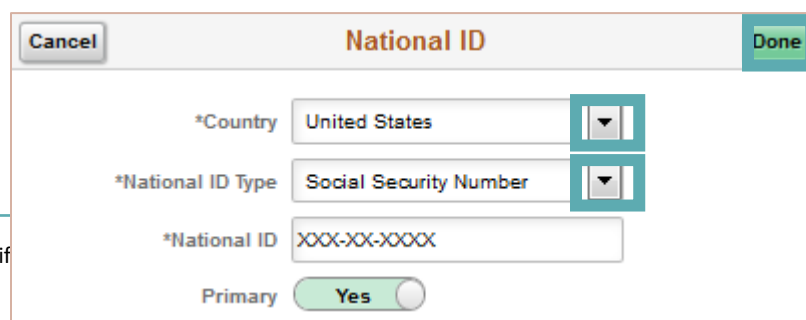
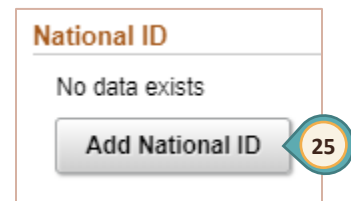


In the new window, if **Yes** is selected in the **Same as mine** field, the system will populate the address from the employee's address. If the address is different, select **No** in the **Same as mine** field and enter a different address for the person. Click the **Done** button when finished.

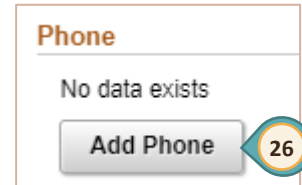


25. Click the **Add National ID** button to add the person's Social Security Number.

Click the drop-down box to select **United States** in the Country field. In the National ID Type field, select **Social Security Number**. Enter the Social Security number in the National ID box. Click the **Done** button after entering the information.

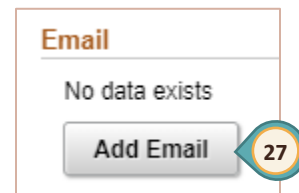


26. Click the **Add Phone** button to enter the person's phone number.



In the new window, if the **Phone Number** for the dependent/beneficiary is the same as the employee, select **Yes** in the **Same as mine** field. If the **Phone Number** is different, set the **Same as mine** field to **No**, select the **Type** from the drop-down box, and enter the **Phone Number** in the space provided. Click the **Done** button when finished.

27. To add an email address, click the **Add Email** button.



In the new window, select the Email Type from the drop-down box. (The available options are **Business**, **Campus**, **Dormitory**, **Home** and **Other**.) Enter the email address in the space provided. Use the **Delete** button to remove an email address if necessary. Click the **Done** button when finished.

28. After all information has been entered, click the **Save** button at the top.

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Cancel **Add Individual Dependent/Beneficiary Information** Save

29. Once the dependent/beneficiary information has been entered, additional dependents/beneficiaries can be entered by clicking the **Add Individual** button and repeating the process of adding a dependent/beneficiary. When finished, click the “X” to return to the **Health** page.

Dependent and Beneficiary Information 29 X

Add Individual

Name	Relationship	Beneficiary	Dependent
John Hill	Spouse	✓	✓

30. Once the dependents/beneficiaries have been added, they will appear on the page. To enroll a dependent in one of the health plans, select the checkbox in front of the name. The cost of each plan type will be updated in the **Enroll in Your Plan** section at the bottom.

- The current Health Plan is indicated with a checkmark. To select a different Health Plan, click the **Select** button next to the Plan Name for the plan type being chosen. To see other coverage costs, select the information icon **i** next to the Plan Name. (For detailed information about all health plans, select the **Overview of All Plans** button.)
- When finished, select the **Done** button.

Cancel **Health** b Done

▼ **Enroll Your Dependents**

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

Dependents	Relationship
<input checked="" type="checkbox"/> John Hill	Spouse

Add Dependent

▼ **Enroll in Your Plan**

The Employee + Spouse cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

Plan Name	Cost (Before Tax)	Cost (After Tax)	Pay Period Cost
Select HMO - Support Professionals i	\$97.15		\$97.15
✓ Point of Service - Support Pro i	\$293.45		\$293.45
Select PPO - Support Professionals i	\$398.94		\$398.94
Select HMO After-Tax - Support Prof i		\$97.15	\$97.15
Select POS After-Tax Support Prof i		\$293.45	\$293.45
Select PPO - After Tax Support Prof i		\$398.94	\$398.94
Select Waive			\$0.00

Overview of All Plans

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a

31. The **Fluid Benefit Enrollment** page will display the updated Health Plan information and cost. (The enrollment can be reviewed and printed as a pdf by selecting the **Review Enrollment** button if desired.) Click the **Submit Enrollment** button for the Benefits Department to process the changes.

Note: Depending on the screen size, resolution, and browser zoom settings, the **Resources** (purple box) may slide over and cover the **Submit Enrollment** button.

Note: Number of dependents has changed.

32. The Benefits Alerts window will appear. Select the **View** button to review the Election Preview Statement or the **Done** button to continue.

32 Done **Benefits Alerts** View

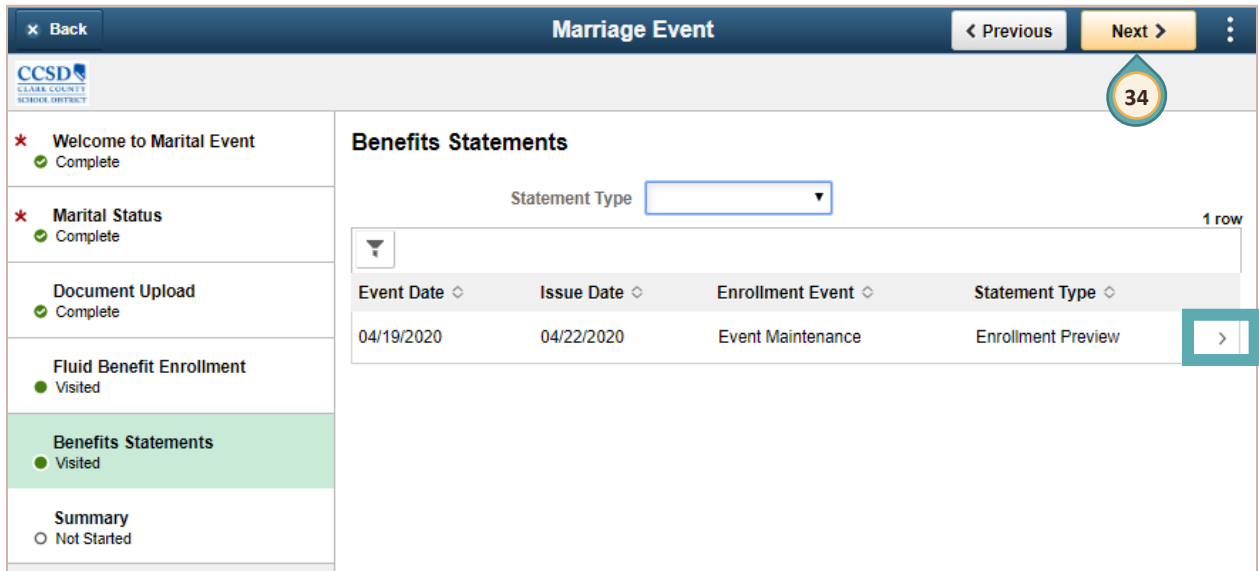
Your benefit choices have been successfully submitted to the Benefits Department.

Select View to review your Election Preview statement, Done to return to the Benefits Enrollment Summary

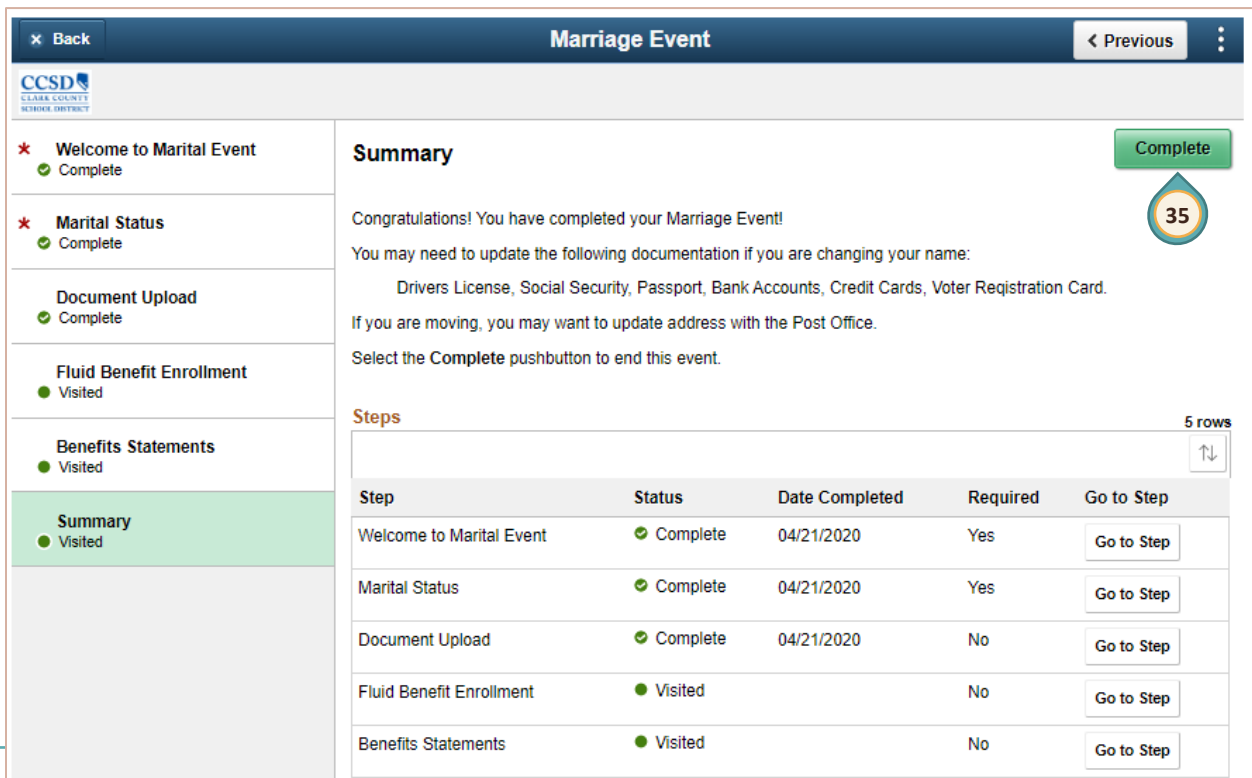
33. Click the **Next** button.



34. On the Benefits Statements page, click the > right arrow to view the Enrollment Preview information if desired. Click the **Next** button.



35. The **Summary** page will be displayed. Review the information on this page for additional items that may need to be completed. Click the **Complete** button to finalize the life event.



36. Click the **Edit** button to update your health care and add your spouse to your insurance plan. When you click the button, the following page will be displayed.