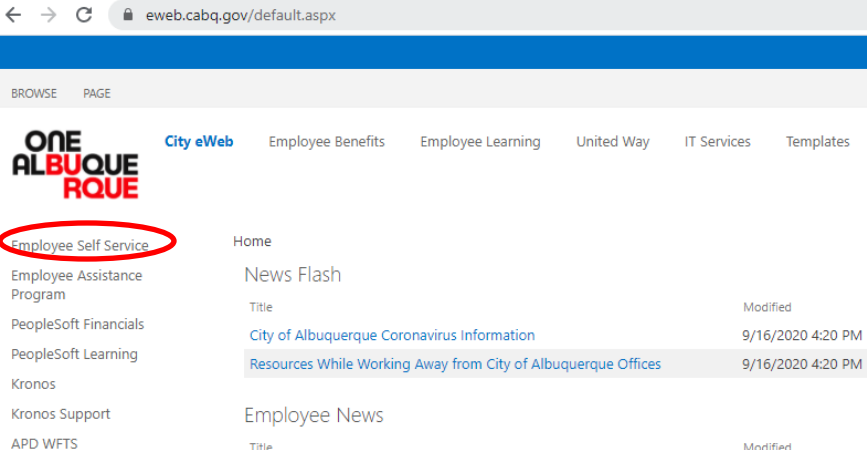
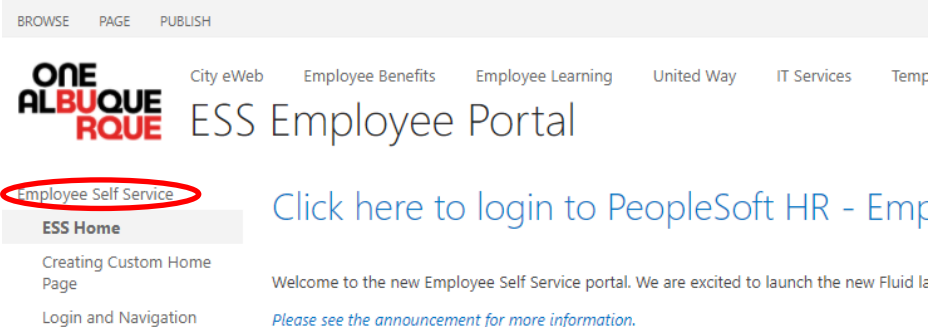




Life Event Benefits Election

This is a job aide to help you navigate through PeopleSoft, the City’s Human Resources, Benefits and Payroll system, to make changes to your benefits due to your Life Event. Please read this instruction carefully to ensure you enroll in the benefits that best fit your needs through Employee Self Service (ESS.)

Please pay attention to the important instructions on each screen throughout the process.

Step	Action
1.	<p>Open an Internet session from any browser. In the address line type employee.cabq.gov. You can also get there by going to the City’s Employee website at eweb.cabq.gov. Once there, you can click on the Employee Self Service link in the top left corner. This will take you to the login screen for PeopleSoft.</p>  <ul style="list-style-type: none"> You will be directed to the ESS Employee Portal Page. Click the Employee Self Service link on the left side. 
2.	<p>When the login page appears, sign into PeopleSoft by entering your User ID and Password. Your User ID is a six character value Exxxxx (the x’s being the last five numbers in your Employee ID.) If you do not know your password, or if you have entered the wrong three times and get locked out, then call the helpdesk at 768-2930 to have your password reset.</p>
3.	<p>Click on the Sign In button.</p>

4. On the ESS Home Page, click on the **Benefit Details** Box:

The screenshot shows the ESS Home Page with a grid of tiles. The 'Benefit Details' tile, located in the middle-right section, is circled in red. Other tiles include 'Leave & Comp Balances', 'Outboarding', 'Company Directory', 'Payroll', 'Personal Details', 'Talent Profile', 'Performance', and 'Open Enrollment'.

5. After you click on the Benefit Details box, you will be taken to a page that shows your current Benefit Summary.

The screenshot shows the 'Benefit Details' page for Laurie Elliott. The 'Life Events' tab is selected. Below the 'Benefit Plans' section, there are radio buttons for 'Employee' with four options: 'had a qualified life event', 'need to update after-tax elections', 'gained or lost Medicare/Medicaid coverage', and 'need to change my deferred compensation contribution'. The 'Start Life Event' button is circled in red.

- To create your Life event, click on the **Life Events** tab on the right side menu.
- On the following page, elect the option that best describes the event that lead you to want to change your benefits by clicking the button before the option.
- Enter the date in the “As of” box and click the Start Life Event button.

6. The following page will display a welcome page for the life event created.

- On the left side, there is a train stop which shows all required actions.
- To complete each required step use the **Next** button at the top right corner of the screen, after all information has been entered, for the screen you are on.

If at any time, you no longer want to complete the life event, click on the **Cancel** button at the top right corner.

7. **Dependent/Beneficiary information Page**

- To add a Dependent/Beneficiary, click on the **Add Individual** button and enter the information for the dependent/beneficiary you want to create a record for.

- When all information has been entered, click on the **Save** button at the top right corner of the screen.
- You will be taken to the list of Dependent/Beneficiary Info, where you should see the person you created a file for, listed.
- Click the **Next** button at the top right of the screen.

8.

Document Upload Page

- Click the **Add Attachment** button to upload a document for the Dependent/Beneficiary, you created a record for in the previous step.
- Enter a Subject Description
- Click **Add Attachment**
- Click **Choose File** to attach the document from your device.
- Click the **Upload** button.
- Once the document is attached, click the **Save** button. You will receive a message box, which states the documents you uploaded must be approved and an email will be sent to you upon approval.
- You will then see a list of documents uploaded.

Document Upload

Instructions
The document upload page is used to upload one or more documents to prove your relationship with a dependent and/or to provide justification for the **Life Event** you are processing. Click the **Add Attachment** button.

Life Event Documents

Life Event Justification

Add Attachment

Document Definition - New Attachment

Instructions

You have chosen to enter a new attachment. In the subject line please enter the type of document and the dependent's name. For example: Birth Certificate John Smith. Then click the Add Attachment button.

Selection Criteria

Description Life Event Documentation

*Subject

Attachment **Add Attachment**

Save

Go To Document Upload

Attachments

Select	Sequence	Created	Author	Entry ID	Subject	Status
<input type="checkbox"/>	1	02/22/2021 11:33AM	[REDACTED]	Life Event Documentation	n	Needs Approval

Select All Deselect All

Delete

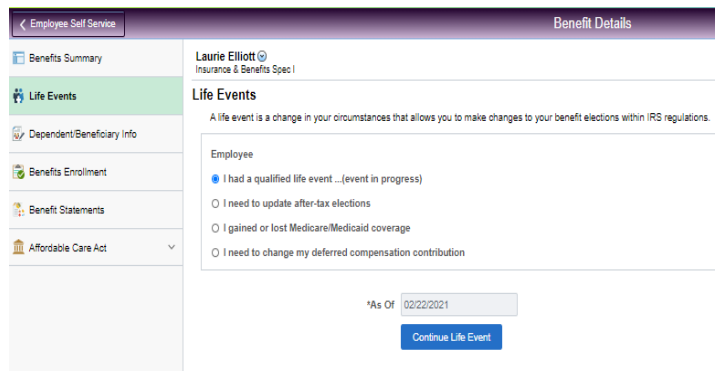
- Click the **Next** button at the top right of the screen.
- Once the document has been approved, you will receive an email telling you to login to Employee Self Service to complete your life event.

9. **Personal Information Pages**

- You will directed through a series of screens providing your personal information. If you any information needs to be updated, click on the field and you will be taken to screen where you can make changes.
- If no updates need to be made or you are finished updating your information, click the **Next** button at the top right of your screen to navigate through the pages.
- Please Note: you will also have a chance to make changes to W-4 and Direct Deposit information.

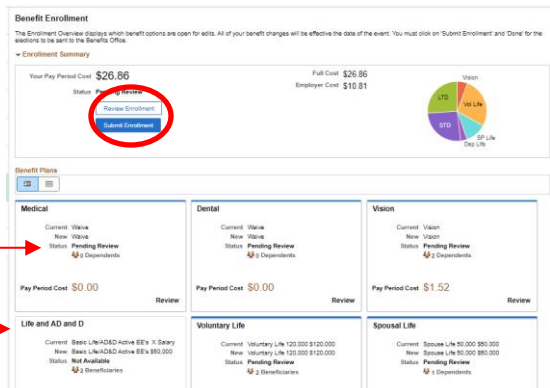
10. **Return to Life Event**

- You should have received an email explaining your document was approved. If so, login to Employee Self Service.
- You can return to your life event by logging into Employee Self Service and clicking on the **Benefit Details** box.
- From the menu on the left side of the page, click on **Life Events**.
- On the Life Events page, make sure the option which shows “(event in progress)” is selected and click on the **Continue Life Event** button



11. **Benefit Enrollment Page**

- Click the **Start My Enrollment** button, to begin your benefit enrollment.
- The next page will show your **Enrollment Summary**.
- To make changes to your benefits, click on any box with a blue top border. NOTE: Any boxes without a blue top border cannot be changed.



Can be changed. →

Cannot be changed. →

- Once all changes have been made, click the **Submit Enrollment** button
- You will receive a Benefit Alert informing you all benefit choices have been successfully submitted. Click the **Done** button at the top left of the message box.
- Click the **Next** button at the top right corner of the screen to view the Benefits Statement.

- Click the **Next** button to view the Summary of your event.
- Click the **Complete** button to complete the event.

Summary

Congratulations! You have completed your Life Event!

You may need to update the following documentation if you are changing your name:

Drivers License, Social Security, Passport, Bank Accounts, Credit Cards, Voter Registration Card.

If you are moving, you may want to update address with the Post Office.

Select the **Complete** pushbutton to end this event.



Complete

Congratulations! You are done!

NOTE: If you need technical assistance call 768-2930.

If you have questions about benefit options call 768-3758.