

## How to Complete Benefits Enrollment through SAP Self-Services

Self-Services is the tool in the SAP Portal for enrolling in benefits for initial enrollment, during open enrollment, or following a qualifying life event. It can only be accessed using a City computer. Outlined below are the full details from beginning to end. For specific actions go to the following:

[Setting up Landing Page and Adding Family Members](#) (steps 1 – 18)

[Accepting Benefits Consent Form](#) (steps 19 – 26)


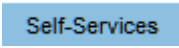
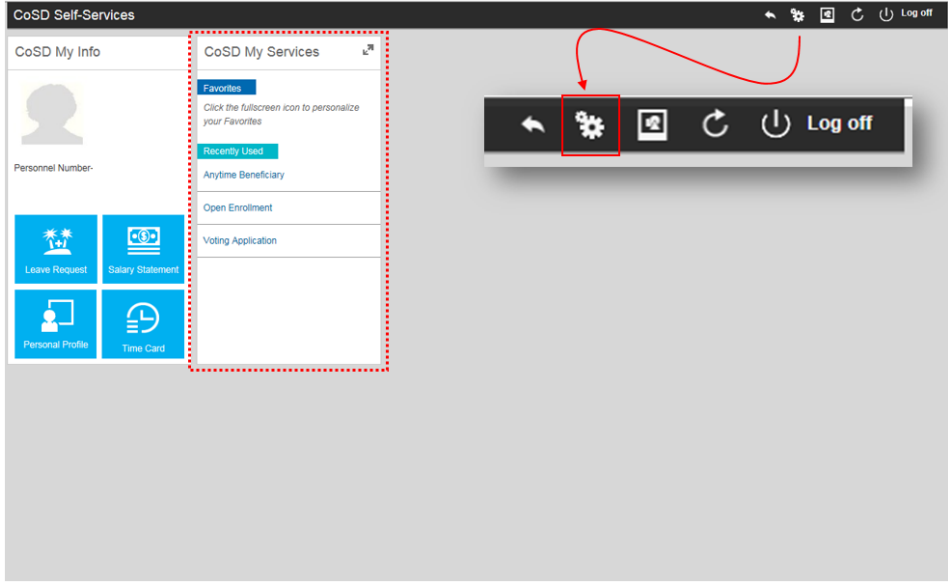
[Enrolling in Benefits – Open Enrollment, New Hire, Job Class Change, etc.](#) (steps 27 – 65)

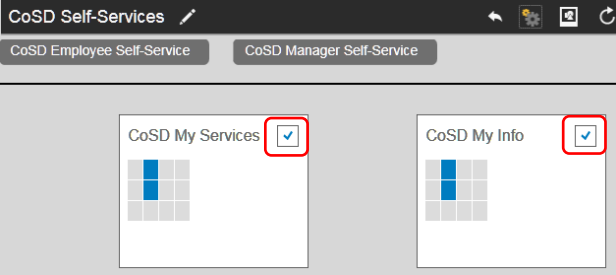
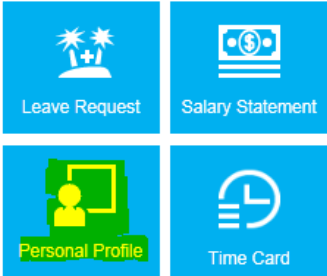
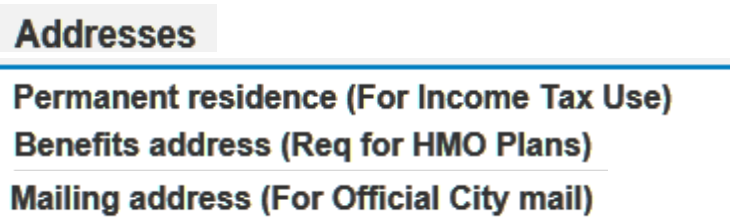



[Anytime Insurance– Portable Term Life](#) (steps 66 – 74)

[Anytime Savings – 401\(k\), 457\(b\) Deferred Compensation Plan](#) (steps 75 – 88)

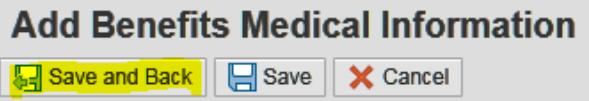
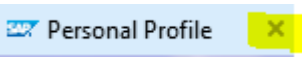

[Anytime Beneficiary – Life Insurance and Savings Plans](#) (steps 89 – 102)

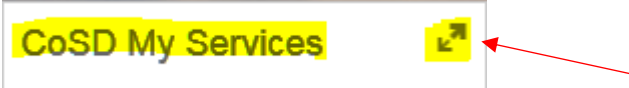
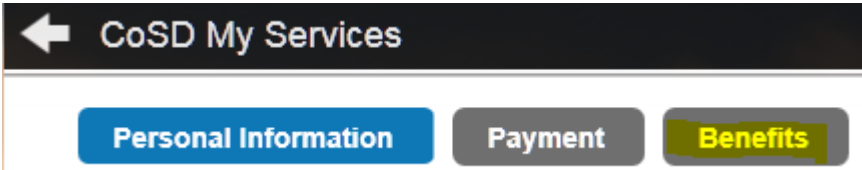

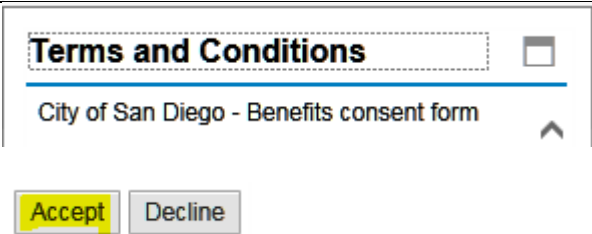
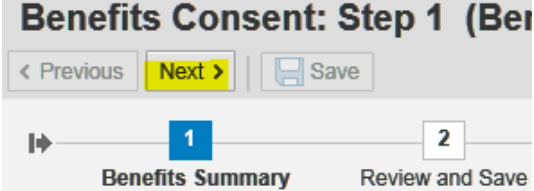
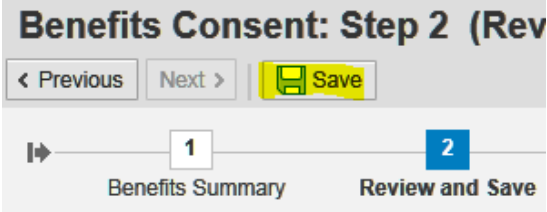
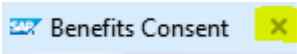

[Printing Confirmation Page](#) (steps 103 – 106)

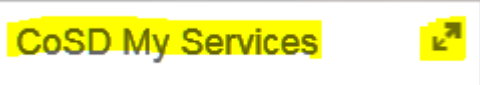

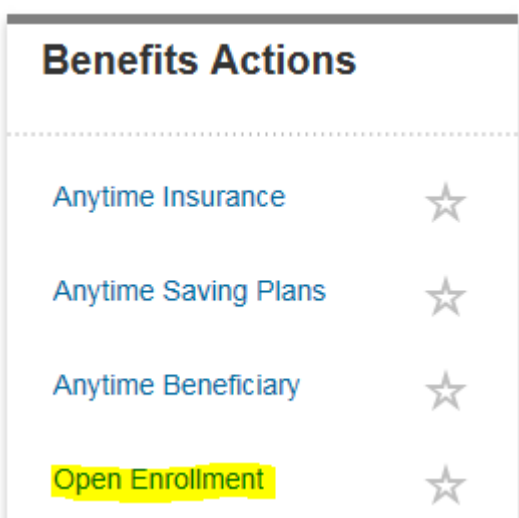
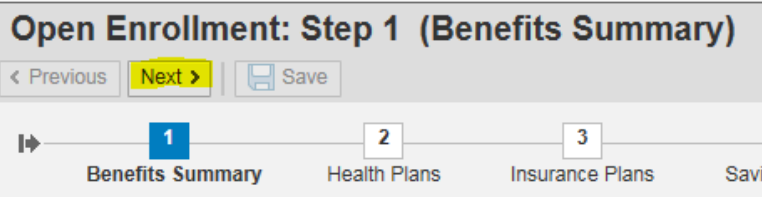
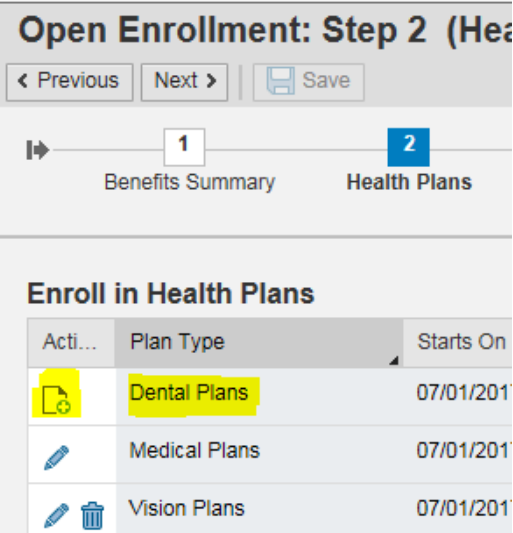
STEPS	SCREENSHOT
Setting up Landing Page and Adding Family Members	
1. Log in to SAP Portal.	<a href="https://onesd.sandiego.gov/irj/portal">https://onesd.sandiego.gov/irj/portal</a>
2. Enter User ID and Password. Press “Enter” key from keyboard.	
3. Click the “Self-Services” tab in your SAP portal.	
4. If you do not see the “My Services” tile on your landing page, select the “Toggle Settings” button.	

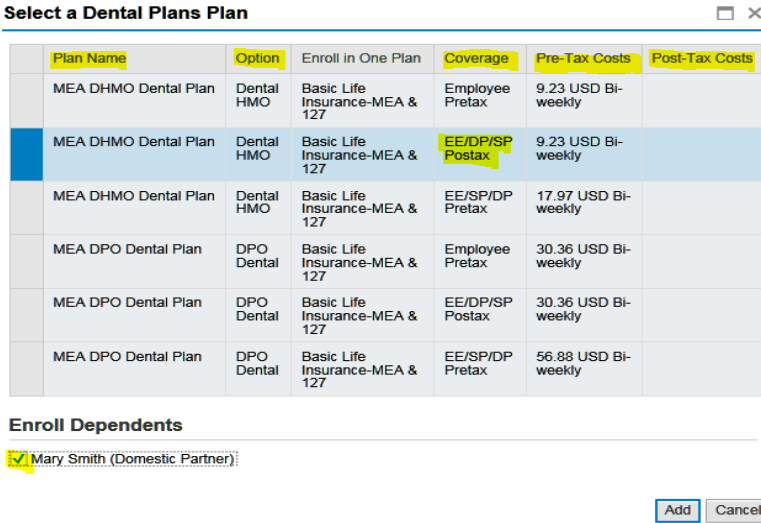

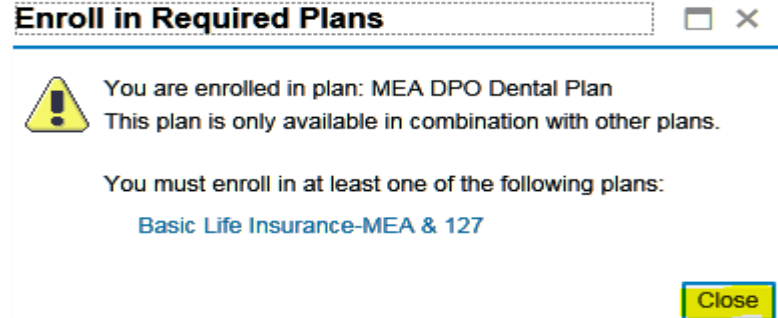

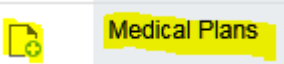
STEPS	SCREENSHOT
<p>5. Ensure that the “CoSD My Services” and “CoSD My Info” boxes are check-marked. Then press the “Toggle Settings” button again to add the tiles to your main page.</p>	
<p>6. Under the CoSD My Info tile, click on “Personal Profile.”</p>	
<p>7. Verify the following Addresses:</p> <ul style="list-style-type: none"> <li>• Permanent residence</li> <li>• Benefits address</li> <li>• Mailing address</li> </ul>	
<p>8. To change an address, click the “Pencil” symbol next to the appropriate address title.</p>	
<p>9. To “Add” family members or dependents that will be enrolled for coverage and/or be named as beneficiaries, click the “Add” button.</p>	
<p>10. Select the appropriate relationship from the drop-down menu.</p>	

STEPS	SCREENSHOT
<p>11. Complete the following information:</p> <ul style="list-style-type: none"> <li>• First Name</li> <li>• Last Name</li> <li>• Title</li> <li>• Date of Birth</li> <li>• Gender</li> <li>• Physician 1 Name and ID Number: Medical HMO *except Kaiser*</li> <li>• Physician 2 Name and ID Number: Dental HMO</li> <li>• Dependent's Address</li> <li>• Social Security Number</li> </ul>	
<p>12. Change "Validity" option to "Valid From" and enter your date of hire.</p> <p><b>NOTE:</b> Dependent's Valid From Date must match employee's <b>Hire Date</b>.</p>	
<p>13. Review data entered and click "Save". If adding multiple dependents click "save and Back". Repeat steps to enter all applicable family members/dependents.</p>	
<p>14. To enter <b>Employee's</b> Physician Information for Medical (except Kaiser) and Dental plans, click the "Add" Button.</p>	
<p>15. Enter Medical HMO Dr's Name and physician ID number in first set of boxes; Dental HMO Dr's Name &amp; ID number on second set of boxes.</p>	

STEPS	SCREENSHOT
16. Save entry by clicking "Save and Back" button.	
17. To close the Personal Profile page, click the "x" button.	
18. Press "F5" key on your computer keyboard to refresh the screen.	

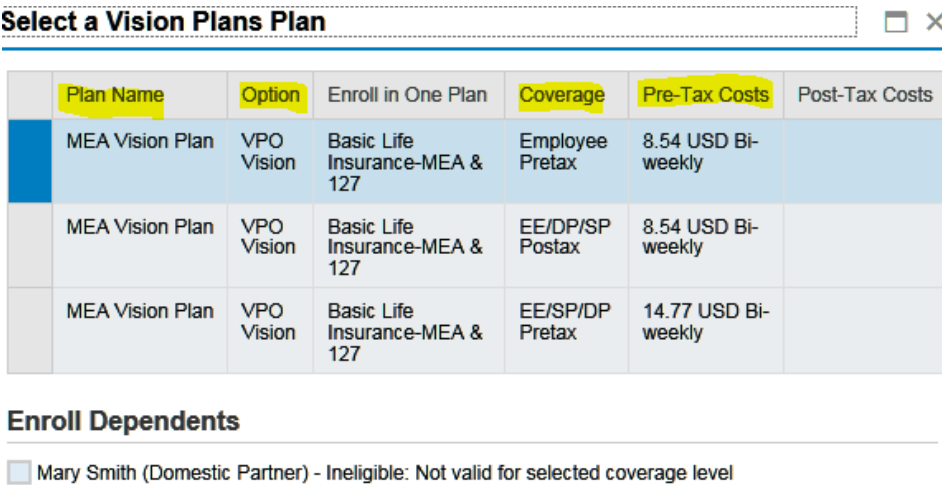

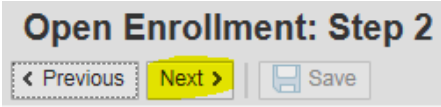
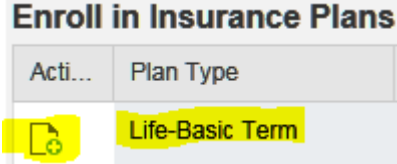
STEPS	SCREENSHOT
Accepting Benefits Consent Form	
19. To enroll for benefits, click the expand arrow of the "CoSD My Services" tile.	
20. Click the "Benefits" button on the expanded CoSD My Services page.	
21. Click the "Benefits Consent Form" link shown in the "Benefits Actions" tile.	
22. Click the "Accept" button to agree to the "Terms and Conditions".	
23. Click the "Next" button.	
24. Click the "Save" button.	
25. Click the "x" to close the "Benefits Consent" page.	
26. Press "F5" key from computer keyboard to refresh the screen and to go back to the main page.	

STEPS	SCREENSHOT
Enrolling in Benefits – Open Enrollment, New Hire, Job Class Change, etc	
27. Click the expand arrow of the “CoSD My Services” tile.	
28. Click the “Benefits” button.	
29. Click the “Open Enrollment” link (or the link for the applicable qualifying life event that you are using to elect changes to coverage, such as being a “New Hire” or “Loss of Coverage”).	
30. If already enrolled, you will begin with a summary of your current benefits. Hit next to proceed to Health Plan enrollment.	
<p>31. To enroll for “Dental” coverage, click the “Add” button.</p> <p><b>NOTE:</b> Dental Plan is optional. This step can be skipped. If not applicable, skip to step 36.</p>	

STEPS	SCREENSHOT
<p>32. Select the Dental Plan, Option, Coverage, and Pre-tax and/or Post-tax Costs you wish to enroll by clicking the "Plan Name".</p> <p><b>NOTE 1:</b> Use the <b>scroll down</b> to view all the plans offered.</p> <p><b>NOTE 2:</b> ONLY select a "Post-Tax" costs if you are enrolling a <b>non-dependent domestic partner</b>.</p> <p><b>NOTE 3:</b> If enrolling a dependent, check the dependents to be enrolled.</p>	
<p>33. Click the "Add" button.</p>	
<p>34. Click the "Close" button if "Enroll in Required Plans" warning appears.</p>	
<p>35. Review the Dental Plan selection that was registered.</p>	
<p>36. To enroll for "Medical" coverage, including the waiver option, click the "Add" button.</p> <p><b>NOTE:</b> Medical Plan is <b>mandatory</b>. This step cannot be skipped.</p>	

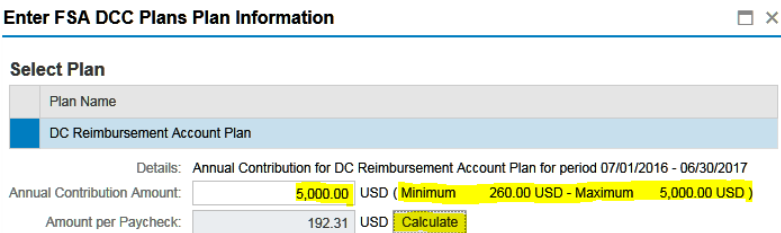

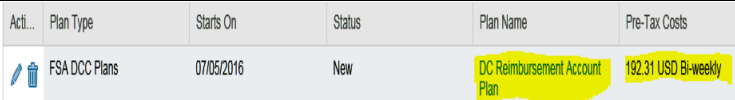
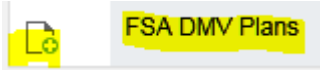
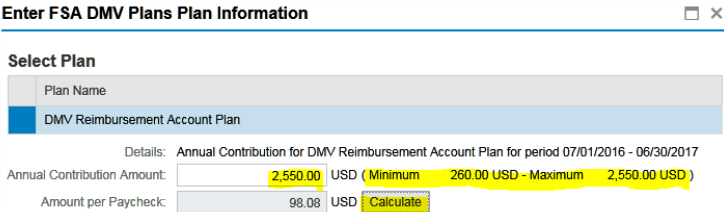

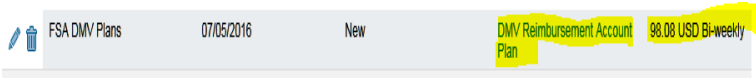
STEPS	SCREENSHOT																																			
<p>37. Select the Medical Plan, Option, Coverage, and Pre-tax and/or Post-tax Costs you wish to enroll by clicking the “Plan Name”.</p> <p><b>NOTE 1:</b> Use the <b>scroll down</b> to view all the plans offered.</p> <p><b>NOTE 2:</b> ONLY select a “Post-Tax” costs if you are enrolling a <b>non-dependent domestic partner</b>.</p> <p><b>NOTE 3:</b> If enrolling a dependent, check the dependents to be enrolled.</p>	<div><div>Select a Medical Plans Plan</div><table><tr><th>Plan Name</th><th>Option</th><th>Coverage</th><th>Pre-Tax Costs</th><th>Post-Tax Costs</th></tr><tr><td>Sharp Select HMO Med Plan</td><td>Health Maintenance Organizatn</td><td>EE/DP/SP Postax</td><td>185.38 USD Bi-weekly</td><td></td></tr><tr><td>Sharp Select HMO Med Plan</td><td>Health Maintenance Organizatn</td><td>EE/SP/DP Pretax</td><td>405.97 USD Bi-weekly</td><td></td></tr><tr><td>COSD Health Net PPO</td><td>Preferred Provider Organizatio</td><td>Employee Pretax</td><td>756.33 USD Bi-weekly</td><td></td></tr><tr><td>COSD Health Net PPO</td><td>Preferred Provider Organizatio</td><td>EE/DP/SP Postax</td><td>756.33 USD Bi-weekly</td><td></td></tr><tr><td>COSD Health Net PPO</td><td>Preferred Provider Organizatio</td><td>EE/SP/DP Pretax</td><td>1,656.37 USD Bi-weekly</td><td></td></tr><tr><td>Waive Medical w/ Fee</td><td>Waive Option</td><td>Employee Pretax</td><td></td><td></td></tr></table><div>Enroll Dependents</div><div><input type="checkbox"/> Mary Smith (Domestic Partner) - Ineligible: Not valid for selected coverage level</div></div>	Plan Name	Option	Coverage	Pre-Tax Costs	Post-Tax Costs	Sharp Select HMO Med Plan	Health Maintenance Organizatn	EE/DP/SP Postax	185.38 USD Bi-weekly		Sharp Select HMO Med Plan	Health Maintenance Organizatn	EE/SP/DP Pretax	405.97 USD Bi-weekly		COSD Health Net PPO	Preferred Provider Organizatio	Employee Pretax	756.33 USD Bi-weekly		COSD Health Net PPO	Preferred Provider Organizatio	EE/DP/SP Postax	756.33 USD Bi-weekly		COSD Health Net PPO	Preferred Provider Organizatio	EE/SP/DP Pretax	1,656.37 USD Bi-weekly		Waive Medical w/ Fee	Waive Option	Employee Pretax		
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<p>38. Click the “Add” button.</p>	<div><div>Add</div><div>Cancel</div></div>																																			
<p>39. Review the Medical Plan selection that was registered.</p>	<div><div><div><div></div></div><div>Medical Plans</div><div>07/05/2016</div><div>New</div><div>Waive Medical w/ Fee</div><div>Waive Option</div><div>Employee Pretax</div></div></div>																																			
<p>40. To enroll for “Dental” coverage, click the “Add” button.</p> <p><b>NOTE:</b> Dental Plan is <b>optional</b>. This step can be skipped. If not applicable, skip to step 44.</p>	<div><div><div></div></div><div>Vision Plans</div></div>																																			

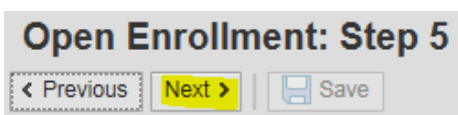
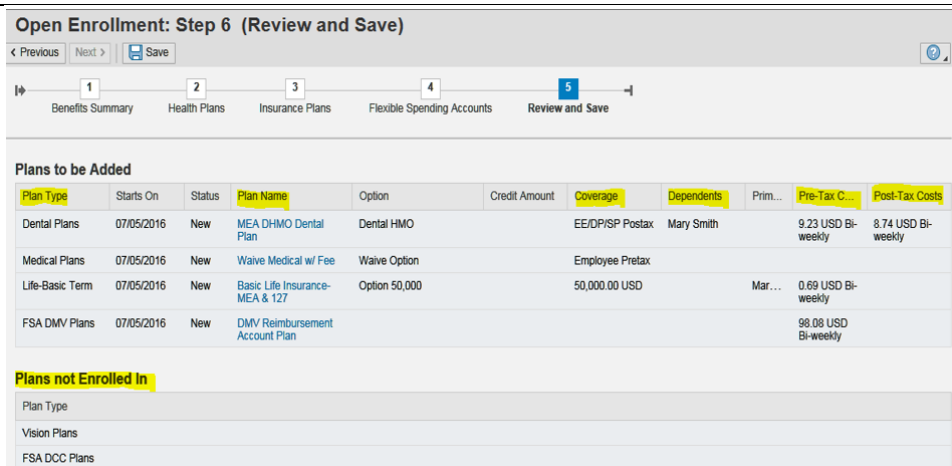

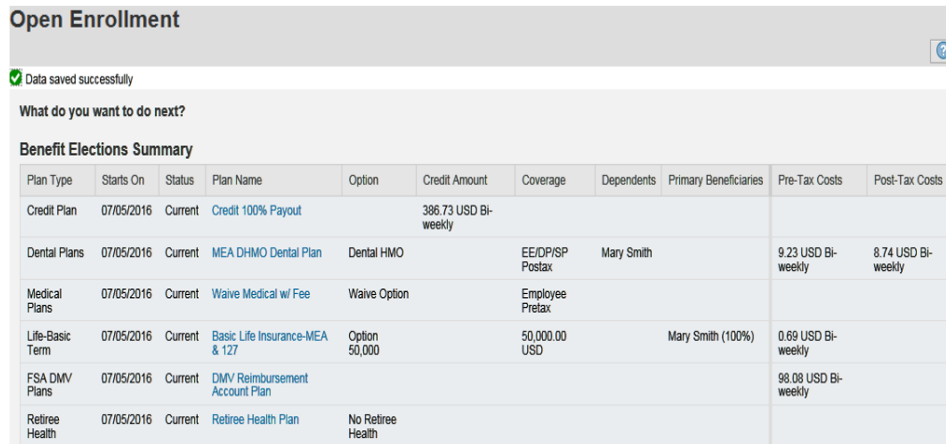
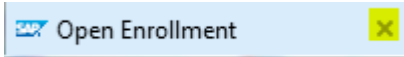



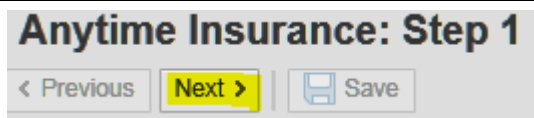
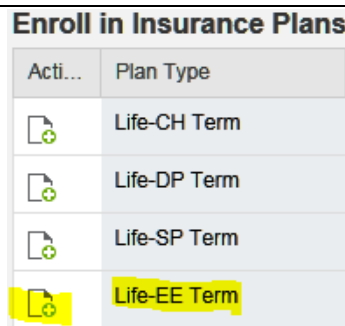
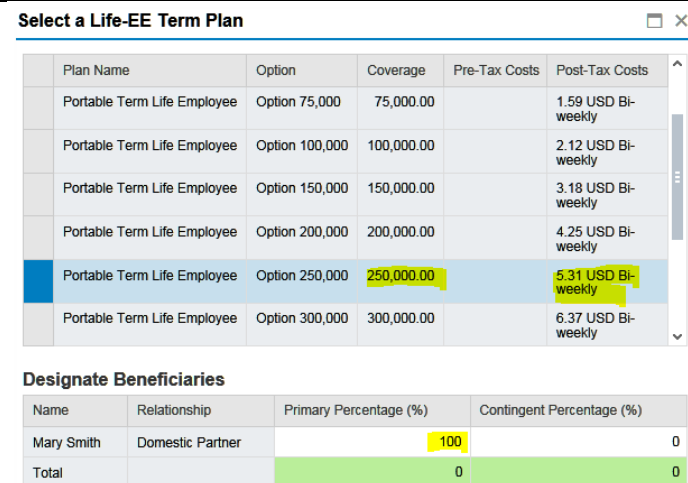

STEPS	SCREENSHOT
<p>41. Select the Vision Plan, Option, Coverage, and Pre-tax and/or Post-tax Costs you wish to enroll by clicking the "Plan Name".</p> <p><b>NOTE 1:</b> Use the <b>scroll down</b> to view all the plans offered.</p> <p><b>NOTE 2:</b> ONLY select a "Post-Tax" costs if you are enrolling a <b>non-dependent domestic partner</b>.</p> <p>42. <b>NOTE 3:</b> If enrolling a dependent, check the dependents to be enrolled.</p>	
<p>43. Review the Vision Plan selection that was registered.</p>	
<p>44. Click "Next" button to go to the Insurance Plans.</p>	
<p>45. Click the "Add" button to enroll for the Basic Term Life Insurance.</p> <p><b>NOTE:</b> Basic Life Insurance is <b>mandatory</b>. This step cannot be skipped.</p>	

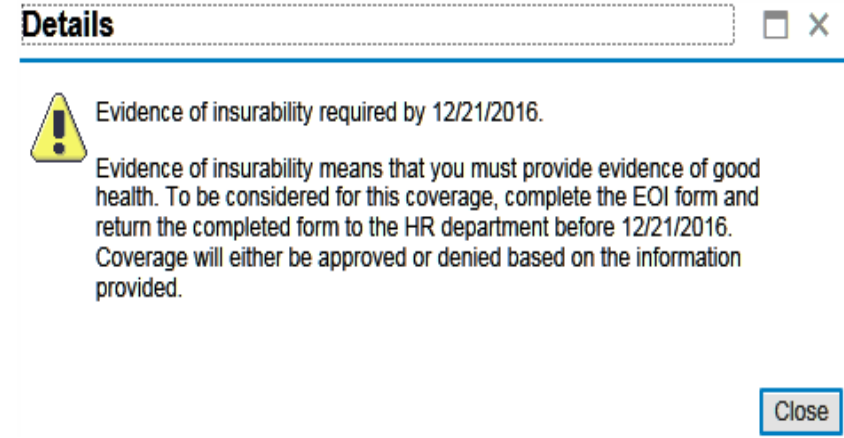

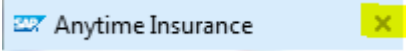
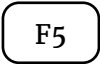
STEPS	SCREENSHOT																																
<p>46. Select the Basic Term plan in which you wish to enroll.</p> <p>Designate your beneficiaries in the pop-up window.</p> <p><b>NOTE:</b> You may have more than one beneficiary as long as it equals to 100%. A contingent beneficiary is in the event that your primary beneficiary is deceased, your contingent beneficiary would then receive the funds.</p>	<div><div>Select a Life-Basic Term Plan</div><table><thead><tr><th>Plan Name</th><th>Option</th><th>Coverage</th><th>Pre-Tax Costs</th><th>Post-Tax Costs</th></tr></thead><tbody><tr><td>Basic Life Insurance-MEA &amp; 127</td><td>Option 10,000</td><td>10,000.00</td><td>0.14 USD Bi-weekly</td><td></td></tr><tr><td>Basic Life Insurance-MEA &amp; 127</td><td>Option 25,000</td><td>25,000.00</td><td>0.35 USD Bi-weekly</td><td></td></tr><tr><td>Basic Life Insurance-MEA &amp; 127</td><td>Option 50,000</td><td>50,000.00</td><td>0.69 USD Bi-weekly</td><td></td></tr></tbody></table><div><div>Designate Beneficiaries</div><table><thead><tr><th>Name</th><th>Relationship</th><th>Primary Percentage (%)</th><th>Contingent Percentage (%)</th></tr></thead><tbody><tr><td>Mary Smith</td><td>Domestic Partner</td><td>100</td><td>0</td></tr><tr><td>Total</td><td></td><td>0</td><td>0</td></tr></tbody></table></div></div>	Plan Name	Option	Coverage	Pre-Tax Costs	Post-Tax Costs	Basic Life Insurance-MEA & 127	Option 10,000	10,000.00	0.14 USD Bi-weekly		Basic Life Insurance-MEA & 127	Option 25,000	25,000.00	0.35 USD Bi-weekly		Basic Life Insurance-MEA & 127	Option 50,000	50,000.00	0.69 USD Bi-weekly		Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)	Mary Smith	Domestic Partner	100	0	Total		0	0
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Mary Smith	Domestic Partner	100	0																														
Total		0	0																														
<p>47. Review the Basic Life selection and beneficiary designation that was registered.</p>	<div><div>Enroll in Insurance Plans</div><table><thead><tr><th>Acti...</th><th>Plan Type</th><th>Starts On</th><th>Plan Name</th><th>Option</th><th>Coverage</th><th>Primary Benefici...</th></tr></thead><tbody><tr><td></td><td>Life-Basic Term</td><td>07/05/2016</td><td>Basic Life Insurance-MEA &amp; 127</td><td>Option 50,000</td><td>50,000.00 USD</td><td>Mary Smith (100%)</td></tr></tbody></table></div>	Acti...	Plan Type	Starts On	Plan Name	Option	Coverage	Primary Benefici...		Life-Basic Term	07/05/2016	Basic Life Insurance-MEA & 127	Option 50,000	50,000.00 USD	Mary Smith (100%)																		
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<p>48. Click “Next” button to go to Savings Plans.</p>	<div><div>Open Enrollment: Step 3</div><div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div></div>																																
<p>49. To elect to make a 401k Flex contribution, click the “Add” button.</p> <p><b>NOTE:</b> 401(k) flex is optional. This step can be skipped. If not applicable, skip to step 52.</p>	<div><div>Enroll in Savings Plans</div><table><thead><tr><th>Acti...</th><th>Plan Type</th></tr></thead><tbody><tr><td></td><td>401k Flex</td></tr></tbody></table></div>	Acti...	Plan Type		401k Flex																												
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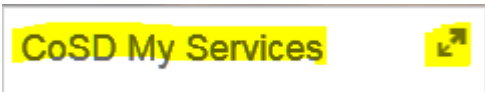
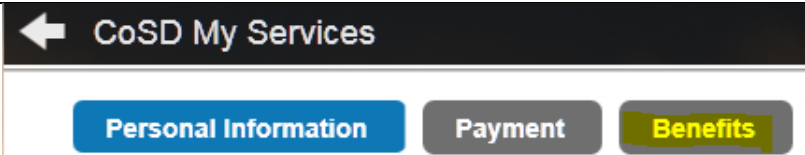
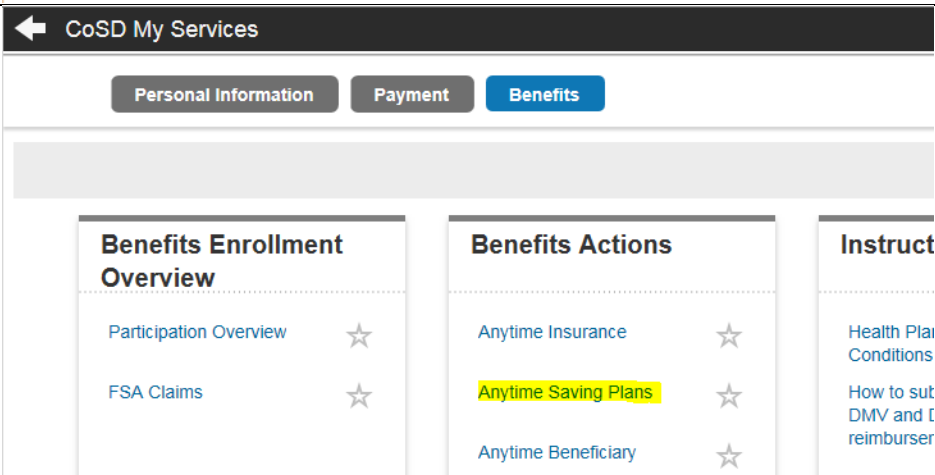
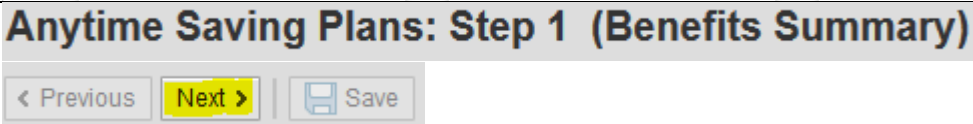
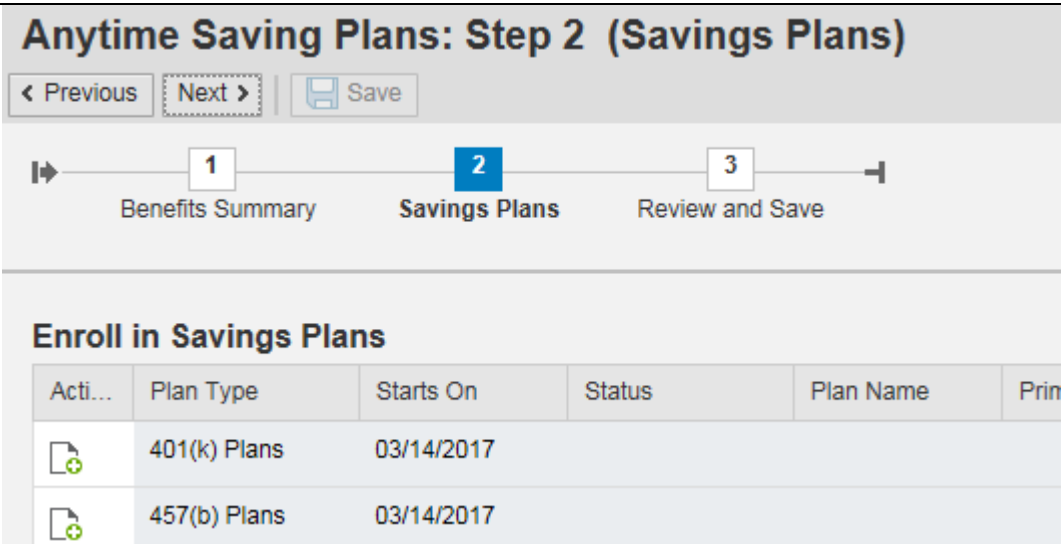
STEPS	SCREENSHOT														
<p>50. Enter the <b>semi-monthly</b> (<u>not</u> annual) amount to be contributed in the “Pre-Tax Amount” field.</p> <p>Enter the Percentage for your beneficiary.</p> <p><b>NOTE:</b> Percentage must total 100% for Primary and Contingent Beneficiaries.</p> <p>Click the “Add” button when entries are complete.</p>	<div><div>Enter 401k Flex Plan Information</div><div><div>Select Plan</div><div><div>Plan Name</div><div>401 (K) Flex Plan</div></div></div><div><div>Regular Contribution</div><div><div>Period: Bi-weekly</div><div><div>Pre-Tax Amount:</div><div>200.00</div><div>USD ( Minimum 0.00 USD )</div></div></div></div><div><div>Designate Beneficiaries</div><table><tr><th>Name</th><th>Relationship</th><th>Primary Percentage (%)</th><th>Contingent Percentage (%)</th></tr><tr><td>Mary Smith</td><td>Domestic Partner</td><td>100</td><td>0</td></tr><tr><td>Total</td><td></td><td>0</td><td>0</td></tr></table></div></div>	Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)	Mary Smith	Domestic Partner	100	0	Total		0	0		
Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)												
Mary Smith	Domestic Partner	100	0												
Total		0	0												
<p>51. Review the 401k Flex contribution and beneficiary designation that was registered.</p>	<div><div>Enroll in Savings Plans</div><table><tr><th>Acti...</th><th>Plan Type</th><th>Starts On</th><th>Status</th><th>Plan Name</th><th>Primary Benefici...</th><th>Pre-Tax Costs</th></tr><tr><td></td><td>401k Flex</td><td>07/01/2017</td><td>New</td><td>401 (K) Flex Plan</td><td>Mary Smith (100%)</td><td>200.00 USD Bi-weekly</td></tr></table></div>	Acti...	Plan Type	Starts On	Status	Plan Name	Primary Benefici...	Pre-Tax Costs		401k Flex	07/01/2017	New	401 (K) Flex Plan	Mary Smith (100%)	200.00 USD Bi-weekly
Acti...	Plan Type	Starts On	Status	Plan Name	Primary Benefici...	Pre-Tax Costs									
	401k Flex	07/01/2017	New	401 (K) Flex Plan	Mary Smith (100%)	200.00 USD Bi-weekly									
<p>52. Click “Next” button to go to the Flexible Spending Accounts (FSA).</p>	<div><div>Open Enrollment: Step 4</div><div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div></div>														
<p>53. Click the “Add” button to enroll for FSA Dependent Child Care reimbursement.</p> <p><b>NOTE:</b> FSA is <b>optional</b>. This step can be skipped. If not applicable, skip to step 61.</p>	<div><div><div>Acti...</div><div><div></div><div>FSA DCC Plans</div></div></div></div>														

STEPS	SCREENSHOT
<p>54. Enter the "Annual" Contribution Amount. Click Calculate button to see the biweekly contribution.</p> <p><b>NOTE:</b> Amount per Paycheck calculator is <u>ONLY</u> accurate during open enrollment. Outside of open enrollment, annual contribution should be divided over remaining pay periods remaining in the current fiscal year.</p>	
<p>55. Click the "Add" button.</p>	
<p>56. Review the FSA DCC enrollment that was registered.</p>	
<p>57. Click the "Add" button to enroll for FSA Dental/Medical/Vision reimbursement</p>	
<p>58. Enter the "Annual" Contribution Amount. Click Calculate button to see the biweekly contribution.</p> <p><b>NOTE:</b> Amount per Paycheck calculator is <u>ONLY</u> accurate during open enrollment. Outside of open enrollment, annual contribution should be divided over remaining pay periods remaining in the current fiscal year.</p>	
<p>59. Click the "Add" button.</p>	
<p>60. Review the FSA DMV enrollment that was registered.</p>	

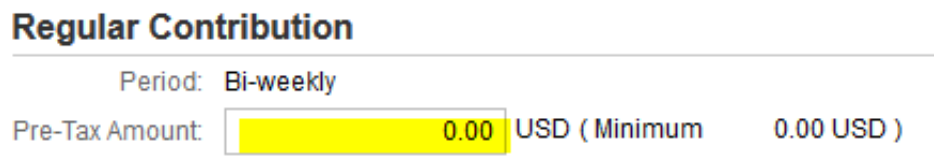
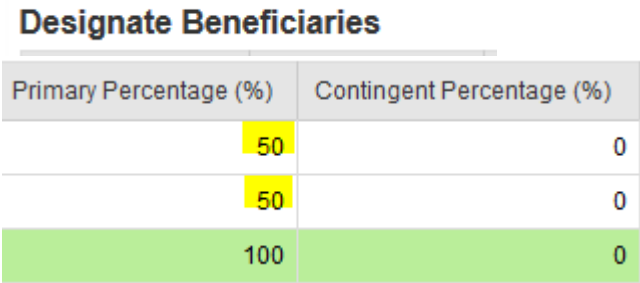


STEPS	SCREENSHOT																																																																													
61. Click the “Next” button to go to the “Review and Save” screen.																																																																														
62. Review Benefits selections by checking the Plan Name, Coverage, Dependents and Pre-tax/Post-tax Costs.  <b>Note:</b> To go back and change benefits selection, click the appropriate step number.	 <table><caption>Plans to be Added</caption><thead><tr><th>Plan Type</th><th>Starts On</th><th>Status</th><th>Plan Name</th><th>Option</th><th>Credit Amount</th><th>Coverage</th><th>Dependents</th><th>Prim...</th><th>Pre-Tax C...</th><th>Post-Tax Costs</th></tr></thead><tbody><tr><td>Dental Plans</td><td>07/05/2016</td><td>New</td><td>MEA DHMO Dental Plan</td><td>Dental HMO</td><td></td><td>EE/DP/SP Posttax</td><td>Mary Smith</td><td></td><td>9.23 USD Bi-weekly</td><td>8.74 USD Bi-weekly</td></tr><tr><td>Medical Plans</td><td>07/05/2016</td><td>New</td><td>Waive Medical w/ Fee</td><td>Waive Option</td><td></td><td>Employee Pretax</td><td></td><td></td><td></td><td></td></tr><tr><td>Life-Basic Term</td><td>07/05/2016</td><td>New</td><td>Basic Life Insurance-MEA &amp; 127</td><td>Option 50,000</td><td>50,000.00 USD</td><td></td><td></td><td>Mar...</td><td>0.69 USD Bi-weekly</td><td></td></tr><tr><td>FSA DMV Plans</td><td>07/05/2016</td><td>New</td><td>DMV Reimbursement Account Plan</td><td></td><td></td><td></td><td></td><td></td><td>98.08 USD Bi-weekly</td><td></td></tr></tbody></table> <p><b>Plans not Enrolled In</b></p> <table><tbody><tr><td>Plan Type</td></tr><tr><td>Vision Plans</td></tr><tr><td>FSA DCC Plans</td></tr></tbody></table>	Plan Type	Starts On	Status	Plan Name	Option	Credit Amount	Coverage	Dependents	Prim...	Pre-Tax C...	Post-Tax Costs	Dental Plans	07/05/2016	New	MEA DHMO Dental Plan	Dental HMO		EE/DP/SP Posttax	Mary Smith		9.23 USD Bi-weekly	8.74 USD Bi-weekly	Medical Plans	07/05/2016	New	Waive Medical w/ Fee	Waive Option		Employee Pretax					Life-Basic Term	07/05/2016	New	Basic Life Insurance-MEA & 127	Option 50,000	50,000.00 USD			Mar...	0.69 USD Bi-weekly		FSA DMV Plans	07/05/2016	New	DMV Reimbursement Account Plan						98.08 USD Bi-weekly		Plan Type	Vision Plans	FSA DCC Plans																			
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64. The “Data saved successfully” green check-mark notifies you that your entries were saved correctly.	 <table><caption>Benefit Elections Summary</caption><thead><tr><th>Plan Type</th><th>Starts On</th><th>Status</th><th>Plan Name</th><th>Option</th><th>Credit Amount</th><th>Coverage</th><th>Dependents</th><th>Primary Beneficiaries</th><th>Pre-Tax Costs</th><th>Post-Tax Costs</th></tr></thead><tbody><tr><td>Credit Plan</td><td>07/05/2016</td><td>Current</td><td>Credit 100% Payout</td><td></td><td>386.73 USD Bi-weekly</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Dental Plans</td><td>07/05/2016</td><td>Current</td><td>MEA DHMO Dental Plan</td><td>Dental HMO</td><td></td><td>EE/DP/SP Posttax</td><td>Mary Smith</td><td></td><td>9.23 USD Bi-weekly</td><td>8.74 USD Bi-weekly</td></tr><tr><td>Medical Plans</td><td>07/05/2016</td><td>Current</td><td>Waive Medical w/ Fee</td><td>Waive Option</td><td></td><td>Employee Pretax</td><td></td><td></td><td></td><td></td></tr><tr><td>Life-Basic Term</td><td>07/05/2016</td><td>Current</td><td>Basic Life Insurance-MEA &amp; 127</td><td>Option 50,000</td><td>50,000.00 USD</td><td></td><td></td><td>Mary Smith (100%)</td><td>0.69 USD Bi-weekly</td><td></td></tr><tr><td>FSA DMV Plans</td><td>07/05/2016</td><td>Current</td><td>DMV Reimbursement Account Plan</td><td></td><td></td><td></td><td></td><td></td><td>98.08 USD Bi-weekly</td><td></td></tr><tr><td>Retiree Health</td><td>07/05/2016</td><td>Current</td><td>Retiree Health Plan</td><td>No Retiree Health</td><td></td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table>	Plan Type	Starts On	Status	Plan Name	Option	Credit Amount	Coverage	Dependents	Primary Beneficiaries	Pre-Tax Costs	Post-Tax Costs	Credit Plan	07/05/2016	Current	Credit 100% Payout		386.73 USD Bi-weekly						Dental Plans	07/05/2016	Current	MEA DHMO Dental Plan	Dental HMO		EE/DP/SP Posttax	Mary Smith		9.23 USD Bi-weekly	8.74 USD Bi-weekly	Medical Plans	07/05/2016	Current	Waive Medical w/ Fee	Waive Option		Employee Pretax					Life-Basic Term	07/05/2016	Current	Basic Life Insurance-MEA & 127	Option 50,000	50,000.00 USD			Mary Smith (100%)	0.69 USD Bi-weekly		FSA DMV Plans	07/05/2016	Current	DMV Reimbursement Account Plan						98.08 USD Bi-weekly		Retiree Health	07/05/2016	Current	Retiree Health Plan	No Retiree Health						
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65. Close the Enrollment page by clicking the “X” button for that tab in your internet browser.																																																																														


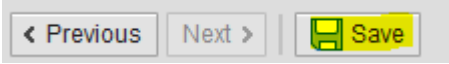
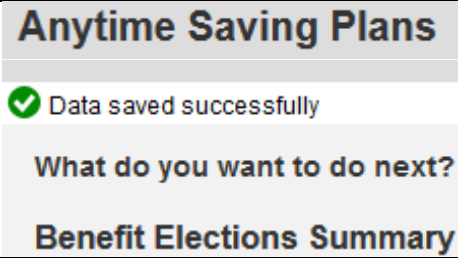
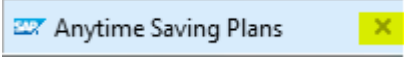

STEPS	SCREENSHOT												
Anytime Insurance– Portable Term Life													
<p>66. To enroll for Portable Term Life Insurance click the “Anytime Insurance” link under COSD My Services &gt; Benefits.</p> <p><b>NOTE:</b> FSA is <b>optional</b>. This step can be skipped. If not applicable, skip to step 74.</p>													
<p>67. Click “Next” button.</p>													
<p>68. Select a <b>Portable Term Life</b> plan and click the “Add” button.</p> <p><b>Note:</b> EE is employee, SP is spouse, DP is domestic partner, CH is children</p>													
<p>69. Select the Portable Life Coverage by clicking on the Coverage level and enter the percentage for Beneficiary Designation.</p>	 <table><caption>Designate Beneficiaries</caption><thead><tr><th>Name</th><th>Relationship</th><th>Primary Percentage (%)</th><th>Contingent Percentage (%)</th></tr></thead><tbody><tr><td>Mary Smith</td><td>Domestic Partner</td><td>100</td><td>0</td></tr><tr><td>Total</td><td></td><td>0</td><td>0</td></tr></tbody></table>	Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)	Mary Smith	Domestic Partner	100	0	Total		0	0
Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)										
Mary Smith	Domestic Partner	100	0										
Total		0	0										
<p>70. Click “Add” button.</p>													

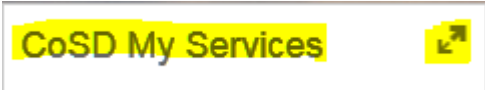
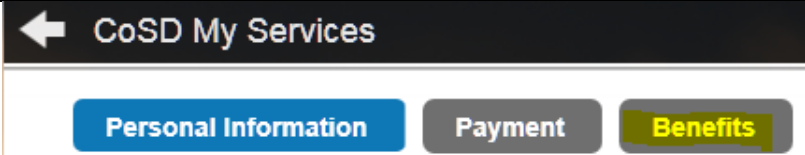
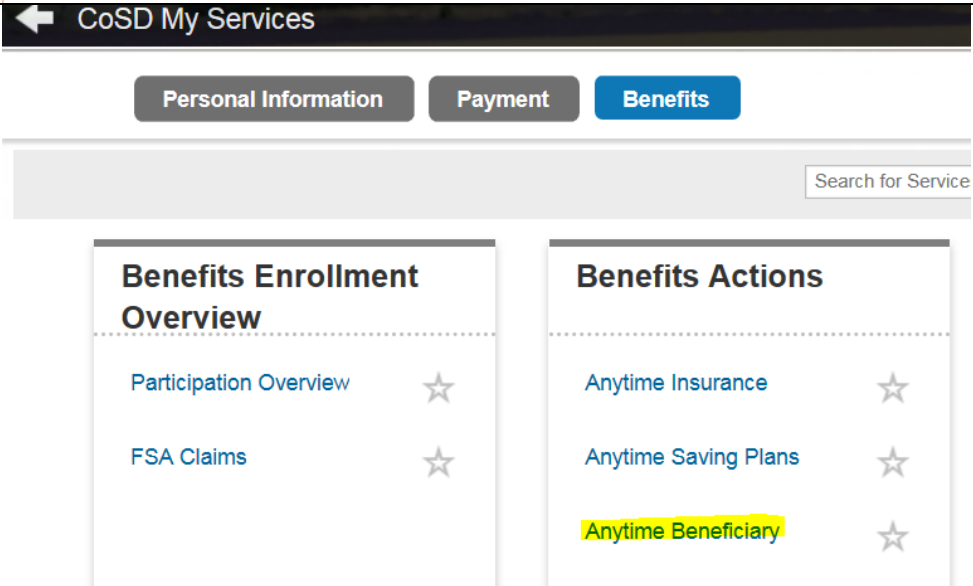
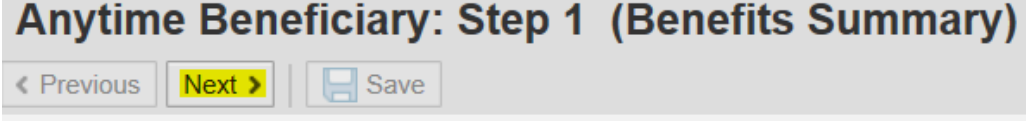
STEPS	SCREENSHOT
<p>71. A notice may appear stating that Evidence of Insurability (EOI) is required. You may disregard this message. The Hartford, the City's life insurance provider, determines if an EOI form is necessary and will mail the form directly to you, if needed. The form is <u>not</u> available from the City.</p> <p>Click the "Close" button.</p> <p><b>NOTE:</b> Repeat steps 68 – 70 for optional Children and Spouse/Domestic Partner coverage, if desired.</p>	
<p>72. Click "Save" to register your enrollment.</p>	
<p>73. Close Anytime Insurance by clicking the "x" button.</p>	
<p>74. Press "F5" key from computer keyboard to refresh the screen and to go back to the main page.</p>	

STEPS	SCREENSHOT
Anytime Savings – 401(k), 457(b) Deferred Compensation Plan	
75. To enroll for optional savings plans, click the expand arrow of the “CoSD My Services” tile.	
76. Click the “Benefits” button.	
77. To enroll for 401(k) and/or 457(b) click the “Anytime Savings Plans” link under COSD My Services > Benefits.  <b>Note:</b> Anytime Savings are <b>optional</b> . This step can be skipped. If not applicable, skip to step 88.	
78. Click “Next” button.	
79. Select an <b>Anytime Savings Plan</b> and click the “Add” button.  <b>Note:</b> The enrollment process into the 401(k) and the 457(b) is the same. The 401k will take effect the next pay period and the 457(b) will go into effect the following month.	



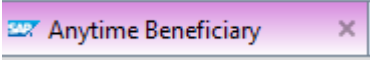

STEPS	SCREENSHOT								
<p>80. Enter the amount you want to contribute next to the Pre-Tax amount.</p> <p><b>Note:</b> The amount must be a minimum of \$10.00 biweekly for both the 401(k) and the 457(b) plans.</p>	 <p><b>Regular Contribution</b></p> <p>Period: Bi-weekly</p> <p>Pre-Tax Amount: <input type="text" value="0.00"/> USD ( Minimum 0.00 USD )</p>								
<p>81. Designate your beneficiaries in the pop-up window.</p> <p><b>NOTE:</b> You may have more than one beneficiary as long as it equals to 100%. A contingent beneficiary is in the event that your primary beneficiary is deceased, your contingent beneficiary would then receive the funds.</p>	 <p><b>Designate Beneficiaries</b></p> <table border="1"> <thead> <tr> <th>Primary Percentage (%)</th><th>Contingent Percentage (%)</th></tr> </thead> <tbody> <tr> <td>50</td><td>0</td></tr> <tr> <td>50</td><td>0</td></tr> <tr> <td>100</td><td>0</td></tr> </tbody> </table>	Primary Percentage (%)	Contingent Percentage (%)	50	0	50	0	100	0
Primary Percentage (%)	Contingent Percentage (%)								
50	0								
50	0								
100	0								
<p>82. Click the "Add" button.</p> <p><b>NOTE:</b> If desired, repeat steps 79 - 82 for additional Anytime Savings Plans.</p>	 <p>Add</p>								
<p>83. Click the "Next" button to go to the "Review and Save" screen.</p>	 <p><b>Enroll in Savings Plans</b></p> <p>&lt; Previous   Next &gt;   Save</p>								

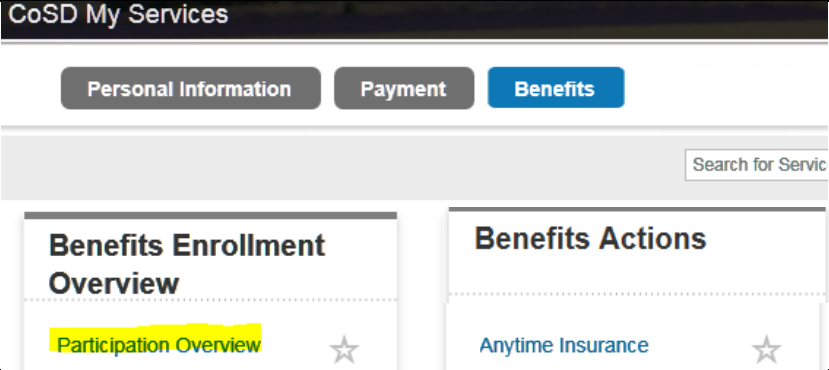

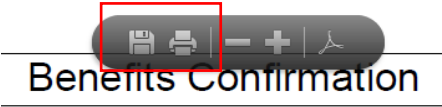
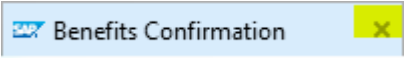
STEPS	SCREENSHOT
<p>84. Review Savings selections by checking the Plan Name, bi-weekly contribution, and beneficiaries.</p> <p><b>Note:</b> To go back and change benefits selection, click the appropriate step number.</p>	
<p>85. Once finished, save your benefits selections by clicking the "Save" button on the "Review and Save" screen.</p>	
<p>86. The "Data saved successfully" green check-mark notifies you that your entries were saved correctly.</p>	
<p>87. Close the Anytime Savings Plans tab by clicking the "x" button.</p>	
<p>88. Press "F5" key from computer keyboard to refresh the screen and to go back to the main page.</p>	

STEPS	SCREENSHOT
Anytime Beneficiary – Life Insurance and Savings Plans	
89. To update all beneficiary assignments, click the expand arrow of the "CoSD My Services" tile.	
90. Click the "Benefits" button.	
91. To assign beneficiaries click the "Anytime Beneficiary" link under COSD My Services > Benefits.	
92. Click "Next" button.	

STEPS	SCREENSHOT												
93. Click the Edit icon for available Insurance Plans.	<div><div>Anytime Beneficiary: Step 2 (Ins</div><div><div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div><div><div><div>1</div><div>2</div></div><div><div>Benefits Summary</div><div>Insurance Plans</div></div></div><div>Enroll in Insurance Plans</div><table><tr><th>Acti...</th><th>Plan Type</th><th>Starts On</th><th>Plan N</th></tr><tr><td></td><td>Life-Basic Term</td><td>04/11/2018</td><td>Basic L Insurar &amp; 127</td></tr><tr><td></td><td>Life-EE Term</td><td>04/11/2018</td><td>Portabl Life En</td></tr></table></div></div>	Acti...	Plan Type	Starts On	Plan N		Life-Basic Term	04/11/2018	Basic L Insurar & 127		Life-EE Term	04/11/2018	Portabl Life En
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Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)										
Mary Smith	Domestic Partner	100	0										
Total		0	0										
95. Click “Next” button.	<div><div>Anytime Beneficiary: Step 2 (Insurance F</div><div><div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div><div><div><div>1</div><div>2</div><div>3</div></div><div><div>Benefits Summary</div><div>Insurance Plans</div><div>Savings Plan</div></div></div></div></div>												

STEPS	SCREENSHOT												
96. Click the Edit icon for available Savings Plans.	<div><div>Anytime Beneficiary: Step 3 (Savings Plans)</div><div><div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div><div><div>1</div><div>2</div><div>3</div><div>4</div></div><div><div>Benefits Summary</div><div>Insurance Plans</div><div>Savings Plans</div><div>Review and S...</div></div></div><div><div>Enroll in Savings Plans</div><table><tr><th>Acti...</th><th>Plan Type</th><th>Starts On</th><th>Status</th><th>Plan Name</th></tr><tr><td></td><td>SPSP M Plans</td><td>04/11/2018</td><td>Current</td><td>SPSP-H Mandatory Plan</td></tr></table></div></div>	Acti...	Plan Type	Starts On	Status	Plan Name		SPSP M Plans	04/11/2018	Current	SPSP-H Mandatory Plan		
Acti...	Plan Type	Starts On	Status	Plan Name									
	SPSP M Plans	04/11/2018	Current	SPSP-H Mandatory Plan									
97. Designate your beneficiaries for available Savings Plans by clicking the Edit icon.  <b>NOTE:</b> You may have more than one beneficiary as long as it equals to 100%. A contingent beneficiary is in the event that your primary beneficiary is deceased, your contingent beneficiary would then receive the funds.	<div><div>Designate Beneficiaries</div><table><tr><th>Name</th><th>Relationship</th><th>Primary Percentage (%)</th><th>Contingent Percentage (%)</th></tr><tr><td>Mary Smith</td><td>Domestic Partner</td><td>100</td><td>0</td></tr><tr><td>Total</td><td></td><td>0</td><td>0</td></tr></table></div>	Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)	Mary Smith	Domestic Partner	100	0	Total		0	0
Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)										
Mary Smith	Domestic Partner	100	0										
Total		0	0										
98. Click the "Next" button to go to the "Review and Save" screen.	<div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div>												
99. Once finished, save your beneficiary selections by clicking the "Save" button on the "Review and Save" screen.	<div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div>												
100. The "Data saved successfully" green check-mark notifies you that your entries were saved correctly.	<div><div>Anytime Beneficiary</div><div> Data saved successfully</div></div>												

STEPS	SCREENSHOT
101. Close the Anytime Savings Plans tab by clicking the "x" button.	
102. Press "F5" key from computer keyboard to refresh the screen and to go back to the main page.	

STEPS	SCREENSHOT
	<div>Printing Confirmation Page</div>
<p>103. To view a summary of your benefits enrollment, click the "Participation Overview" link, which will take you to your Benefits Enrollment Statement.</p>	 <p>The screenshot shows the 'CoSD My Services' header with tabs for 'Personal Information', 'Payment', and 'Benefits'. Below is a search bar and two main sections: 'Benefits Enrollment Overview' and 'Benefits Actions'. In the 'Benefits Enrollment Overview' section, the 'Participation Overview' link is highlighted in yellow.</p>
<p>104. Click "Display" button to display participation overview as of the date shown. NOTE: Change the Date to view benefits as of a specific date (such as the start of the new fiscal year to view open enrollment changes).</p> <p>Click "Print" button shown on the upper right to create a PDF of the overview.</p>	 <p>The screenshot shows the 'Benefits Participation Overview' page. It includes a date selector 'Participation Overview as of: 11/30/2017' and a yellow 'Display' button. On the right side, there are icons for user profile, print, and help.</p>
<p>105. Click "Save a copy" and/or "Print file" icons to keep a record of your Benefits Confirmation.</p>	 <p>The screenshot shows the 'Benefits Confirmation' page. A red box highlights the 'Save' and 'Print' icons in the top toolbar.</p>
<p>106. Close the Benefits Participation Overview by clicking the "x" button.</p>	 <p>The screenshot shows a browser window titled 'Benefits Confirmation'. A yellow box highlights the close button (an 'x' icon) in the top right corner of the window.</p>