

BENEFICIARY INSTRUCTIONS

Does your employee know? If a death occurs and a minor (a person not of legal age) or the insured's estate is the beneficiary, it may be necessary to have a guardian or a legal representative appointed before any death benefit can be paid. This means legal expenses for the beneficiary and delay in the payment of the insurance. Please have members take this into account when naming a beneficiary.

*****Percentages must be designated for the beneficiary to be valid.**

Click on PA30 – Search for the employee by the Social Security Number using the match code

Once the **personnel number** populates, click your enter key to populate the employee you wish to add /change the beneficiary

The screenshot displays the 'Maintain HR Master Data' web application. At the top, there is a navigation bar with buttons: Menu, Back, Exit, Cancel, System, Create, Change, Display, Copy, Delimit, Delete, and Overview. Below this, the 'Personnel no.' field is highlighted with a red box, and a blue arrow points to it. The 'Name' field is also highlighted. The 'EE group' is 'L External - BN' and the 'EE subgroup' is '41 24 Non-Paid'. The 'Personnel area' is '0004' and the 'Pers. subarea' is '2001'. The 'Status' is 'Active' and the 'Benefits Only' is 'Board of Ed.'. The interface is divided into several tabs: Basic personal data, Payroll, Benefits, Time, Taxes, and Planning Data. The 'Benefits' tab is selected. Below the tabs, there is a list of 'Infotype text' with checkmarks: 0000 Actions, 0001 Organizational Assignment, 0002 Personal Data, 0006 Addresses, 0007 Planned Working Time, 0008 Basic Pay, 0009 Bank Details, 0019 Monitoring of Tasks, and 0031 Reference Personnel Numbers. To the right of the list is a 'Period' section with radio buttons for 'Today', 'All', 'From curr.date', 'To Current Date', 'Current Period', 'Curr.week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is at the bottom of the 'Period' section. The 'PA30' label is visible in the bottom right corner of the interface.

Click on your Benefits Tab

IT0021 (Family Members/Dependents)

PA30 - Maintain HR Master Data

Maintain HR Master Data

Menu | Back | Exit | Cancel | System | Create | Change | Display | Copy | Delimit | Delete | Overview

Personnel no. [REDACTED]
Name [REDACTED] Status Active
EE group L External - BN Personnel area 0004 Benefits Only
EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.

Basic personal data | Payroll | **Benefits** | Time | Taxes | Planning Data

Infotype text

- 0021 Family Member/Dependents
- 0031 Reference Personnel Numbers
- 0041 Date Specifications
- 0167 Health Plans
- 0168 Insurance Plans
- 0170 Flexible Spending Accounts
- 0171 General Benefits Information
- 0219 External Organizations
- 0376 Benefits Medical Information

Period

Period

From [] To []

Today Curr.week
 All Current month
 From curr.date Last week
 To Current Date Last month
 Current Period Current Year

Choose

Direct selection

Infotype [] STy []

Please check before anything is created on the family member/dependents **0021 Infotype to see if the person on the beneficiary form has not already been created. If it has not, then you will need to create the person listed on the beneficiary form.

Important Note: just in case you are having problems creating the beneficiary
***Check STY box to **make sure that it is blank**, if not, you will either need to delete or enter Codes 1 (spouse), 2 (Child), or 9003 (Other Beneficiary's) in the **STY** field

Click the Create Button

PA30 - Maintain HR Master Data

Maintain HR Master Data

Menu | Back | Exit | Cancel | System | **Create** | Change | Display | Copy | Delimit | Delete | Overview

Personnel no. [REDACTED]
Name [REDACTED] Status Active
EE group L External - BN Personnel area 0004 Benefits Only
EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.

Basic personal data | Payroll | **Benefits** | Time | Taxes | Planning Data

infotype text
0021 Family Member/Dependents
0031 Reference Personnel Numbers
0041 Date Specifications
0167 Health Plans
0168 Insurance Plans
0170 Flexible Spending Accounts
0171 General Benefits Information
0219 External Organizations
0376 Benefits Medical Information

Period
Period
From [] To []
Today Curr. week
All Current month
From curr. date Last week
To Current Date Last month
Current Period Current Year
Choose

Direct selection
Infotype [] STy []

If your beneficiary is a spouse or a child then you would click on spouse (1) or child (2) in the list below. If the person on the beneficiary form is someone other than a spouse or child then you would click on Other Beneficiaries (9003), this also includes estate. These are the only options that should be selected from the list.

Click Enter or Green Check Mark

PA30 - Maintain HR Master Data

Maintain HR Master Data

Menu | Back | Exit | Cancel | System | Create | Change | Display | Copy | Delimit | Delete | Overview

Subtypes for infotype "0021 Family Member/Dependents" (1)

Search Criteria
Find...

STyp	Name
1	Spouse
10	Divorced spouse
11	Father
12	Mother
13	Domestic Partner
14	Child of Domestic Partner
2	Child
3	Legal guardian
4	Testator
5	Guardian
6	Stepchild
7	Emergency contact - Primary
8	Related persons
90	Emergency contact - Optional
9001	Court Ordered Dependent
9002	Retiree Account
9003	Other Beneficiaries

17 Entries found

Enter **Start** date.

This could either be the Hire Date of the employee or the Date the employee signed the beneficiary form.

Enter beneficiary's name; gender, birth date, and SSN.

PA30 - Maintain HR Master Data

Create 0021 Family Member/Dependents

Menu | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview

Personnel No [REDACTED] Name [REDACTED]
EE group L External - BN Personnel area 0004 Benefits Only Status Active
EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.
Start 06/01/2011 To 12/31/9999

Member Spouse Number

Personal data

Last name [REDACTED]
First name [REDACTED] Initials [REDACTED]
Title [REDACTED]
Gender Female Male
Birth date [REDACTED] Ref.Pers.No. [REDACTED]
SSN [REDACTED] Smoker

This is showing the drop down if you have 2 beneficiaries you would like to include. You first entered your spouse and now you will enter information for a child. You may enter as many beneficiaries as you would like following these steps.

PA30 - Maintain HR Master Data

Maintain HR Master Data

Menu | Back | Exit | Cancel | System | Create | Change | Display | Copy | Delimit | Delete | Overview

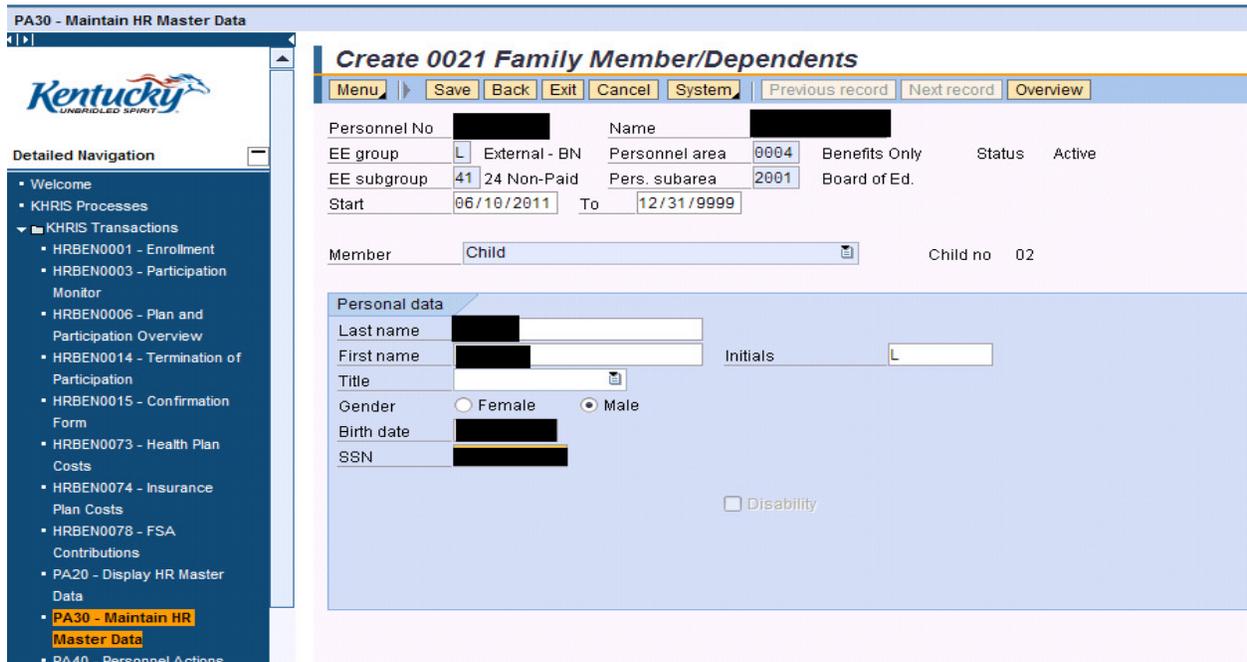
Subtypes for infotype "0021 Family Member/Dependents" (1)

Search Criteria

Find...

STyp	Name
1	Spouse
10	Divorced spouse
11	Father
12	Mother
13	Domestic Partner
14	Child of Domestic Partner
2	Child
3	Legal guardian
4	Testator
5	Guardian
6	Stepchild
7	Emergency contact - Primary
8	Related persons
90	Emergency contact - Optional
9001	Court Ordered Dependent
9002	Retiree Account
9003	Other Beneficiaries

17 Entries found



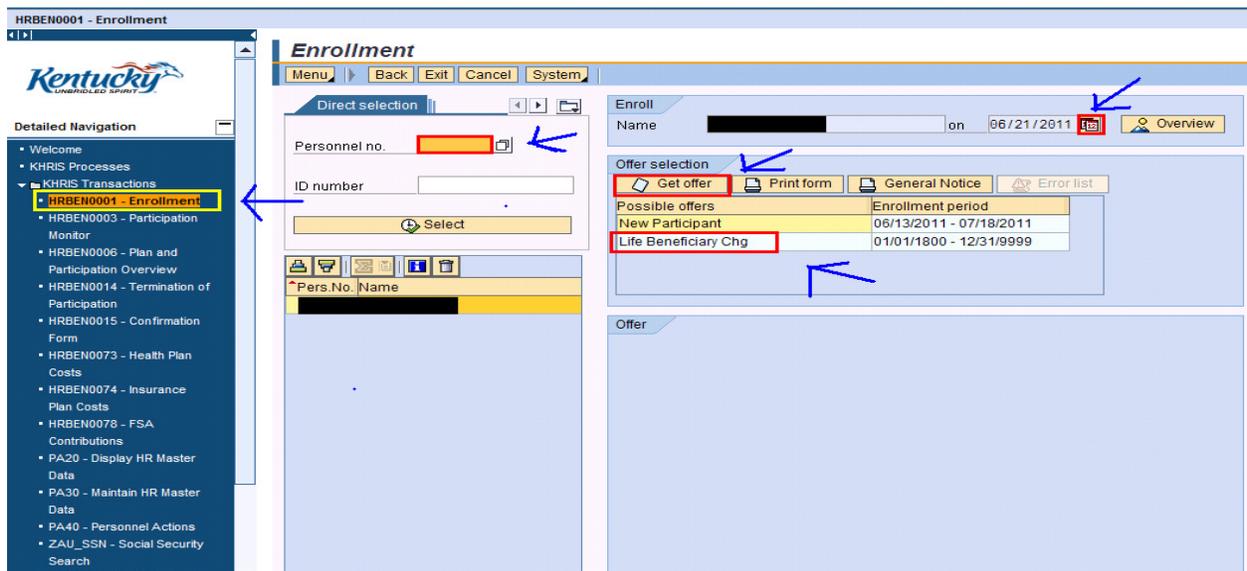
Go to HRBEN0001 –Enrollment (menu on left side)

Enter **Personnel number**

Click **“Calendar”** icon to the right of the calendar date – Enter the date the employee signed the application or the Hire Date of the employee (depending on which date was entered on previous step).

Click on the **Life Beneficiary Change** tab

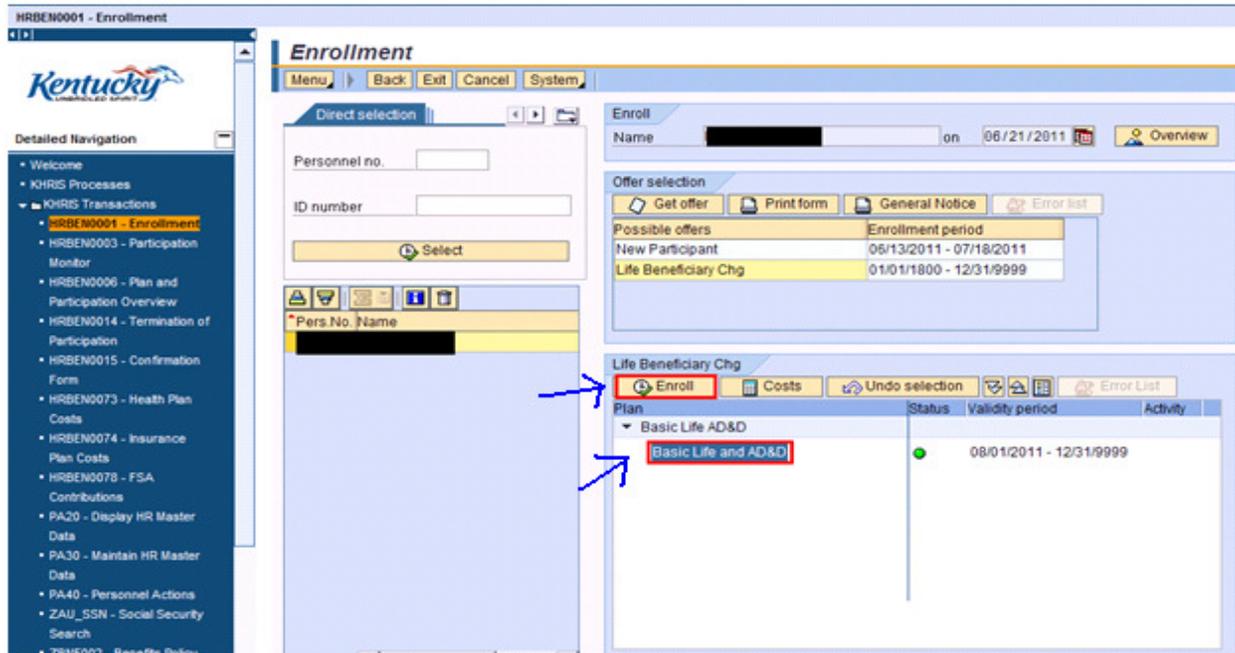
Get Offer



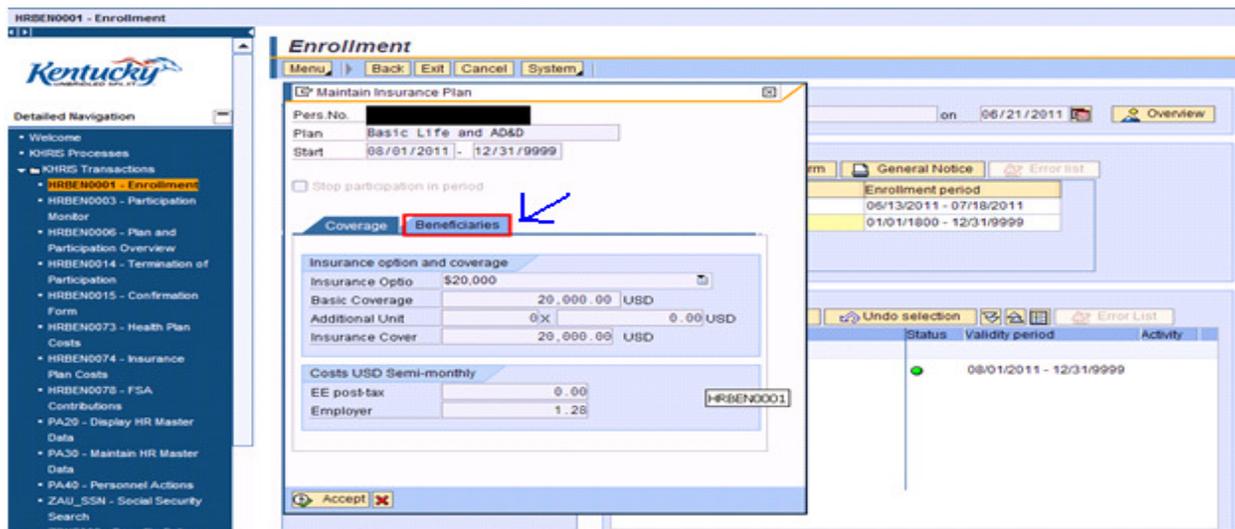
***It is recommended to change your resolution on your desktop to 75%. You can do this by selecting the drop down arrow of 100% in the right bottom of your computer screen.

Click on the **Basic Life and AD&D** (or whichever Life Plan that you need to attach the beneficiary to) as seen below.

Click **Enroll**



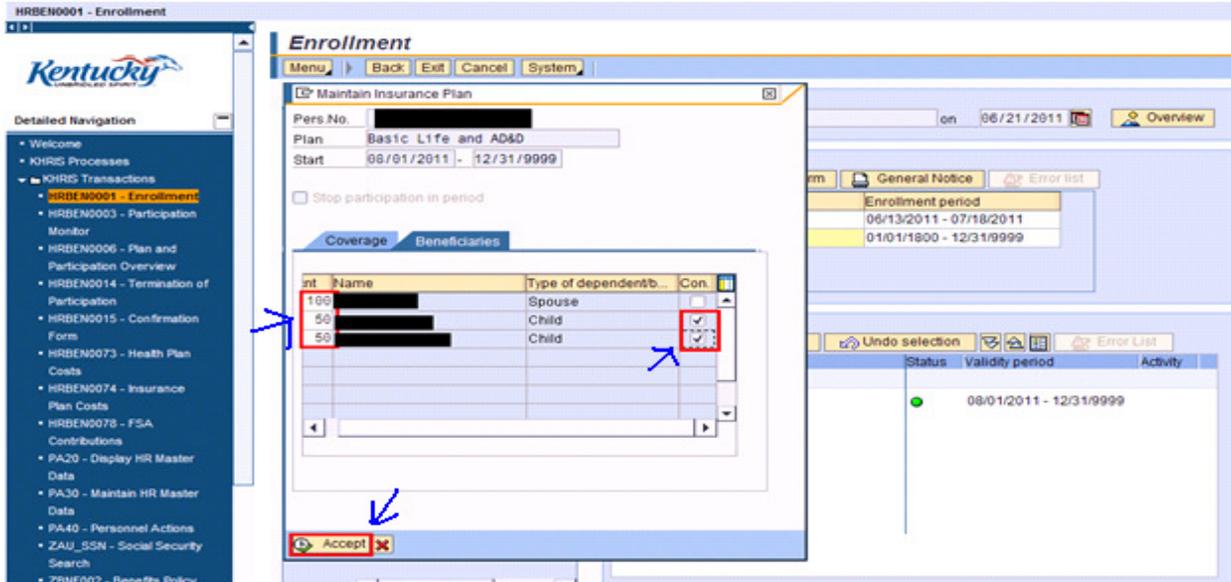
The box below will pop up and then you will need to click the **beneficiary** tab



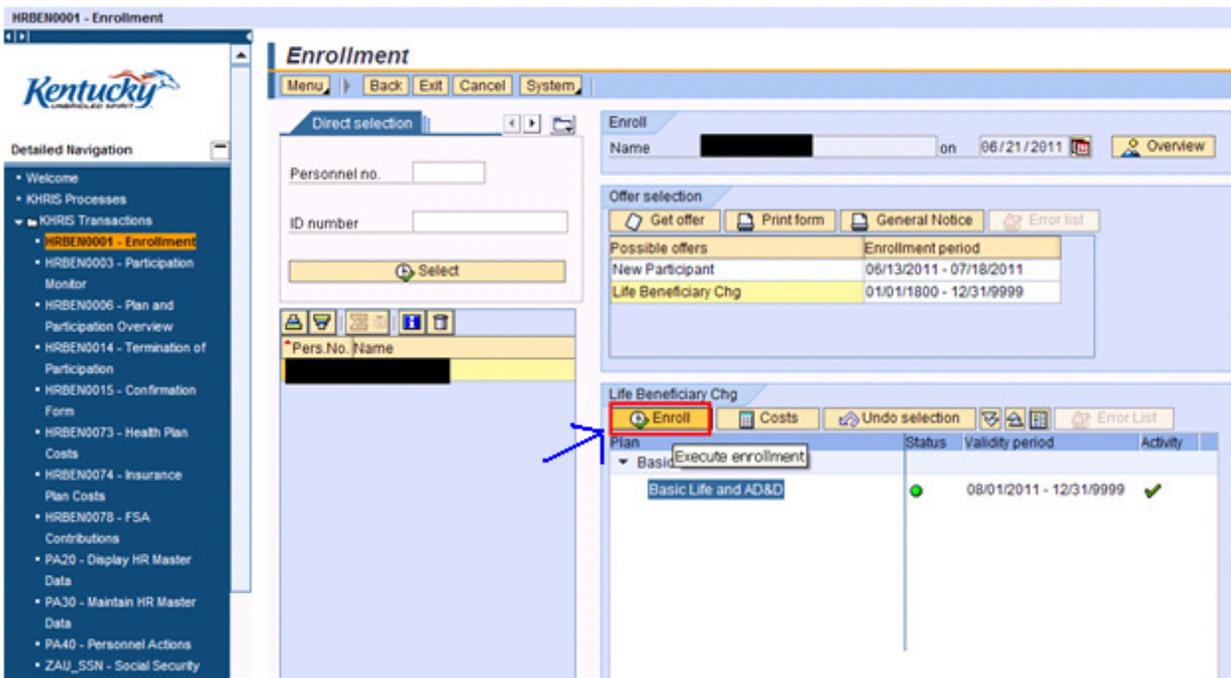
You will see a list of the beneficiaries that were entered in the prior steps on IT0021 – Family Member/Dependents.

Important Note: Percentages must be designated for the beneficiary to be valid.

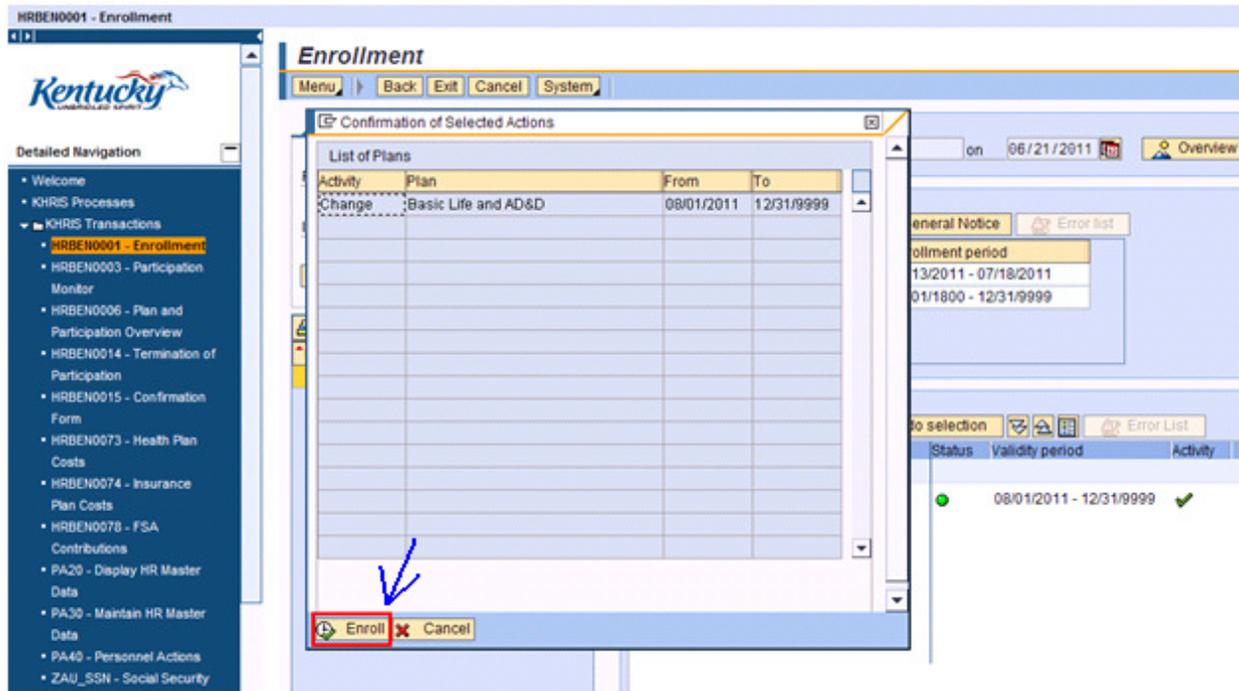
If a person is a **contingent**, make sure the contingent box is checked to the right of their relationship. Please make sure everything listed equals 100%. If 3 children are listed as 33 1/3%, you would need to enter these at 33%, 33%, and 34%.



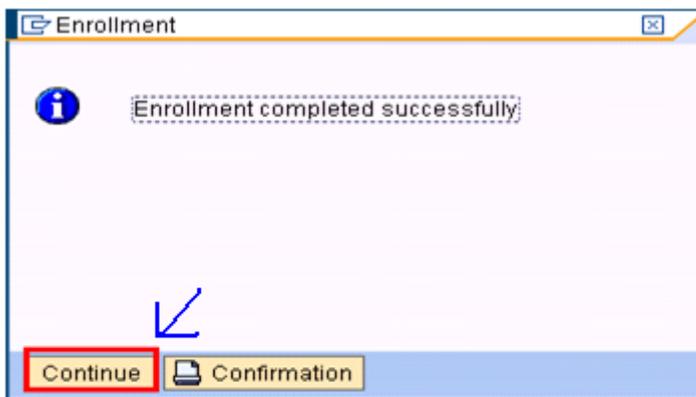
After everything is entered, click **Accept**



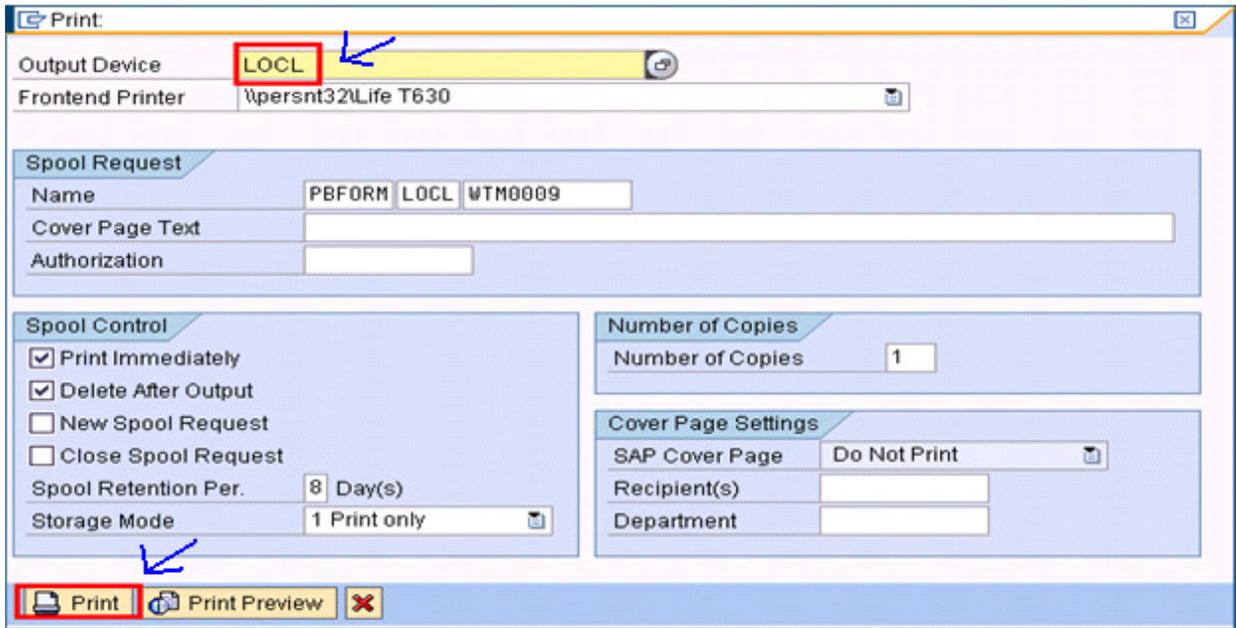
Click **Enroll**



Click **Enroll** again



Click the **continue** button or if a confirmation form needs to be printed, click **Confirmation**



This is what the screen looks like if the confirmation form is selected. Once you get to this screen, in the output device, instead of LOCL, change this to **ZPDF**. This should print to your personal computer.

To be able to view what has just been entered, click on **PA20** on the left hand side of the screen.

Click on the **Benefits Tab**

Select **IT1068**

Click **Display**

Click **Beneficiaries** tab

PA20 - Display HR Master Data

Display 0168 Insurance Plans

Menu | Back | Exit | Cancel | System | Previous record | Next record | Overview

Personnel No [redacted] Name [redacted]
 Payroll area BN Org unit Bracken County Bd of Ed
 Start 08/01/2011 to 12/31/9999 Chng 06/21/2011 WTH0009

Plan B501 Basic Life and AD&D

Plan data Administration Insurance cov. Costs **Beneficiaries**

Pcnt	Beneficiary name	Type of depende...	ID number	Birth date	Co
100	[redacted]	Spouse	[redacted]	[redacted]	[redacted]
50	[redacted]	Child	[redacted]	[redacted]	[redacted]
50	[redacted]	Child	[redacted]	[redacted]	[redacted]

Now you are able to view the information.

PA20 - Display HR Master Data

Display 0168 Insurance Plans

Menu | Back | Exit | Cancel | System | Previous record | Next record | Overview

Personnel No [redacted] Name [redacted]
 Payroll area BN Org unit Bracken County Bd of Ed
 Start 08/01/2011 to 12/31/9999 Chng 06/21/2011 WTH0009

Plan B501 Basic Life and AD&D

Plan data Administration Insurance cov. Costs **Beneficiaries**

Pcnt	Beneficiary name	Type of depende...	ID number	Birth date	Co
100	[redacted]	Spouse	[redacted]	[redacted]	[redacted]
50	[redacted]	Child	[redacted]	[redacted]	[redacted]
50	[redacted]	Child	[redacted]	[redacted]	[redacted]