

Enrolling Dependent-Beneficiary
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Enrolling Dependent-Beneficiary

Enrolling Dependent-Beneficiary Overview

The agency Human Resources Representative can create dependent records so that an employee's dependent can participate in benefit plans, such as medical insurance. Beneficiary records can also be created so that an employee's Beneficiary will receive benefits from a plan, such as life insurance, in the event of the employee's death. (Note: this does NOT include beneficiaries for a retirement plan.) A person can be both a dependent and a beneficiary for an employee.

Note: Before beginning this instruction, be sure to know what plans the employee is enrolled in (including the begin date) and to which ones the employee wants to add Dependents/Beneficiaries. (The employee must be enrolled in benefits prior to proceeding with this process.)

Note: Be sure to know the employee's Home Business Unit.

Note: Be sure to know the dependent/beneficiary Social Security Numbers. (If the dependent/beneficiary Social Security Number is unknown, please refer to step 8 in this instruction for alternative entry options.)

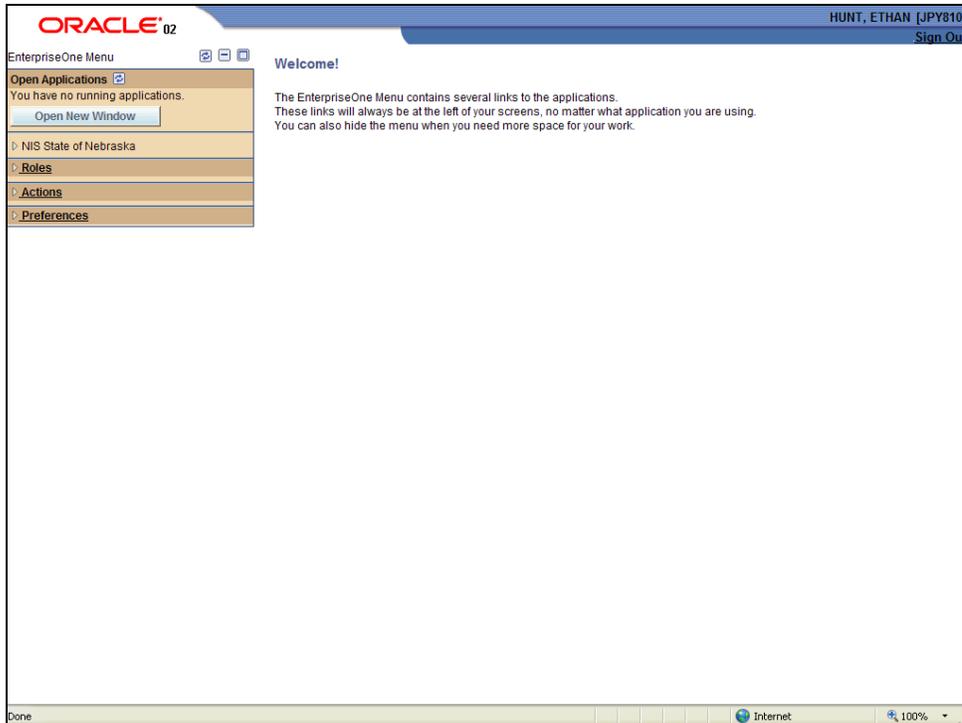
Enrolling Dependent-Beneficiary Lesson

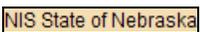
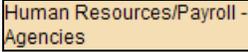
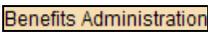
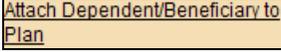
Procedure

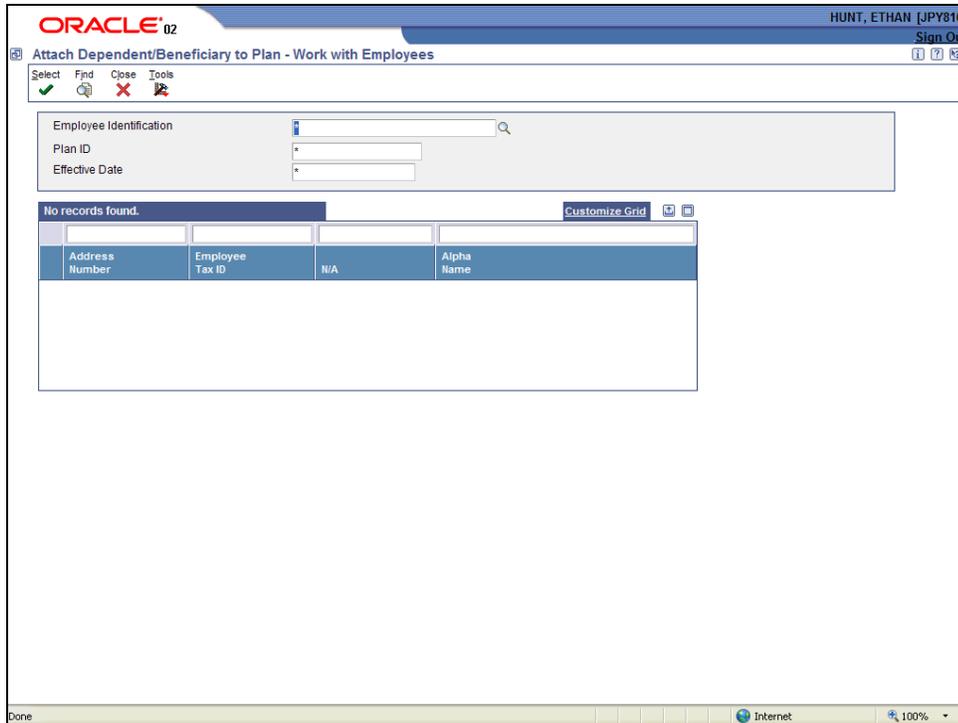
This lesson shows how to add dependents and beneficiaries to employee benefit plans.

Training Guide

Enrolling Dependent-Beneficiary



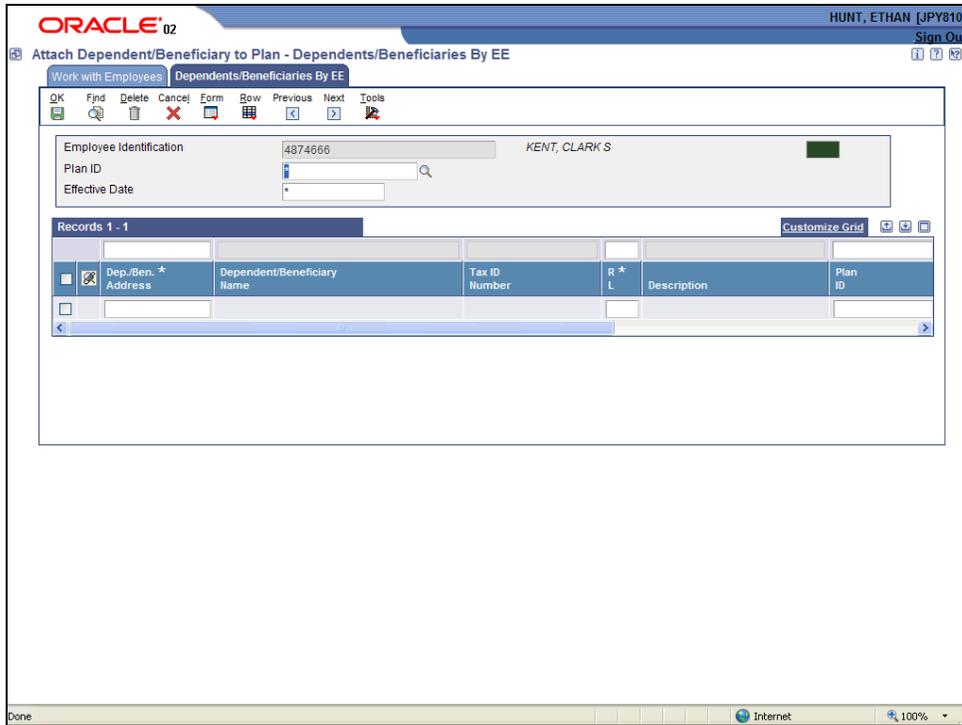
Step	Action
1.	Click the NIS State of Nebraska link. 
2.	Click the Human Resources/Payroll - Agencies link. 
3.	Click the Benefits Administration link. 
4.	Click the Attach Dependent/Beneficiary to Plan link. 

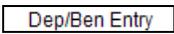


Step	Action
5.	Enter the employee's address book number in the Employee Identification field in the header.
6.	Click the Find button. 
7.	Click the Select button. 
8.	<p>If there are dependents listed in the grid, be sure to look for the one you want to enter. If he/she already exists in the grid, there is no need to create a new/duplicate record. Write down the number in the Dep./Ben. Address field and use it for any further entry involving this dependent/beneficiary.</p> <p>Note: Enter a separate row for each dependent/beneficiary and each Plan ID to which he/she is to be attached. For example, a person may be the dependent for medical, dental and vision insurance AND the beneficiary for 4 different life insurance plans = 7 rows in the grid for this dependent/beneficiary.</p>

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Step	Action
9.	If the dependent/beneficiary is not listed in the grid click the Row button. 
10.	Click the Dep/Ben Entry menu. 

Step	Action
11.	Enter the gender for the dependent/beneficiary in the Gender field. Note: If the dependent/beneficiary is a trust, assign it a Male gender and use the date the trust was initiated or today's date.
12.	Enter the birthday of the dependent/beneficiary in the Date of Birth field.
13.	Complete the School Attending field if the Full Time Student field has a Y .
14.	Click the OK button. 
15.	Notice that the system has assigned an Address Book number for this dependent/beneficiary in the Address Number field. Write down this number for further reference.

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Step	Action
16.	In the Alpha Name field enter their name using ALL CAPS with their last name followed by their first name (ex. LASTNAME, FIRSTNAME).
17.	<p>In the Tax ID field enter the dependent/beneficiary's social security number.</p> <p>Note:</p> <p>When entering a newborn dependent/beneficiary for whom a social security number has not yet been assigned, enter "NEWBORN"</p> <p>When entering a trust or estate that has not yet been issued a number, enter "TRUST"</p> <p>When the employee does not know the dependent/beneficiary social security number, enter "PENDING"</p> <p>When the dependent/beneficiary does not allow use of their social security number, or they are unable to provide it, use "UNAVAILABLE"</p>
18.	In the Business Unit field enter the employee's Home Business Unit. Use the Visual Assist tool if necessary.
19.	<p>Click the Mailing tab.</p> <p>Mailing</p>

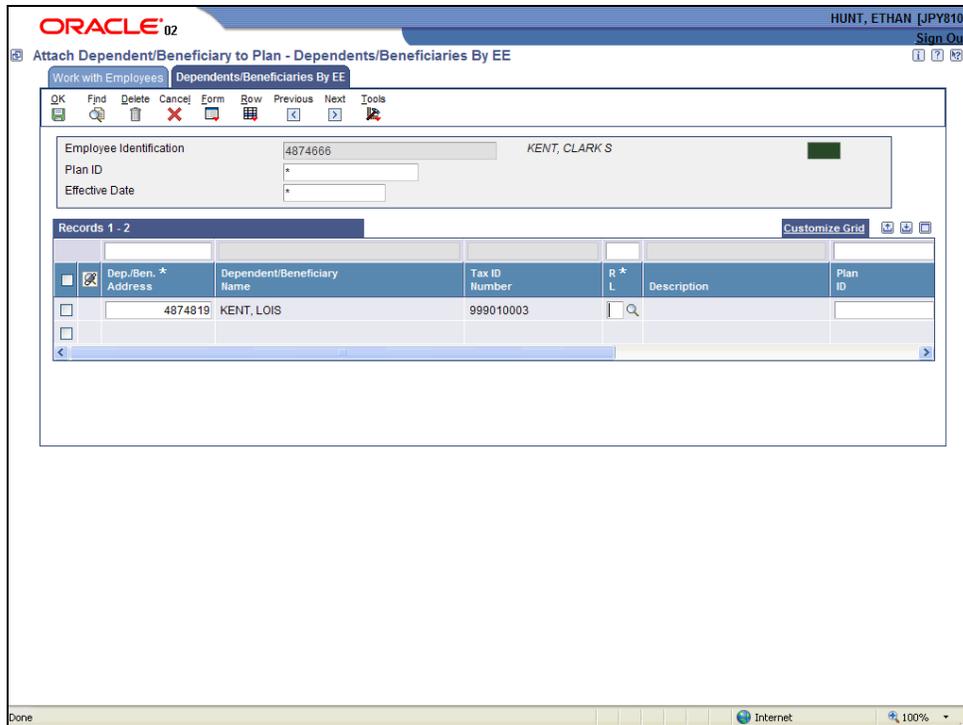
Step	Action
20.	<p>In the Mailing Name field enter the dependent/beneficiaries name in ALL CAPS with their first name followed by their last name (ex. FIRSTNAME LASTNAME).</p> <p>Note: This field is very important and must be entered accurately as this is what is used by the vendors to create benefit ID cards.</p>
21.	Enter the dependent/beneficiary's street address in the Address Line 1 field.
22.	Enter the city in the City field.
23.	Enter the state in the State field.
24.	Enter the zip code in the Postal Code field.
25.	Enter the county in the County field.
26.	<p>Click the OK button.</p> 

Step	Action
27.	<p>Click the Cancel button.</p> 

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Step	Action
28.	<p>The dependent/beneficiary you added is displayed in the Dependent/Beneficiary Name field.</p> <p>You can add additional dependents/beneficiaries by following the previous steps (Row, Dep/Ben Entry, etc).</p>



Step	Action
29.	<p>In the line for the dependent/beneficiary enter the relationship (spouse, child, parent, trust, other) to this dependent/beneficiary in the R L field. Use the Visual Assist tool if necessary.</p> 

ORACLE 02 HUNT, ETHAN [JPY810] Sign Out

Work with Employees Dependents/Beneficiaries By EE

Employee Identification #4874666 KENT, CLARK S

Plan ID *

Effective Date *

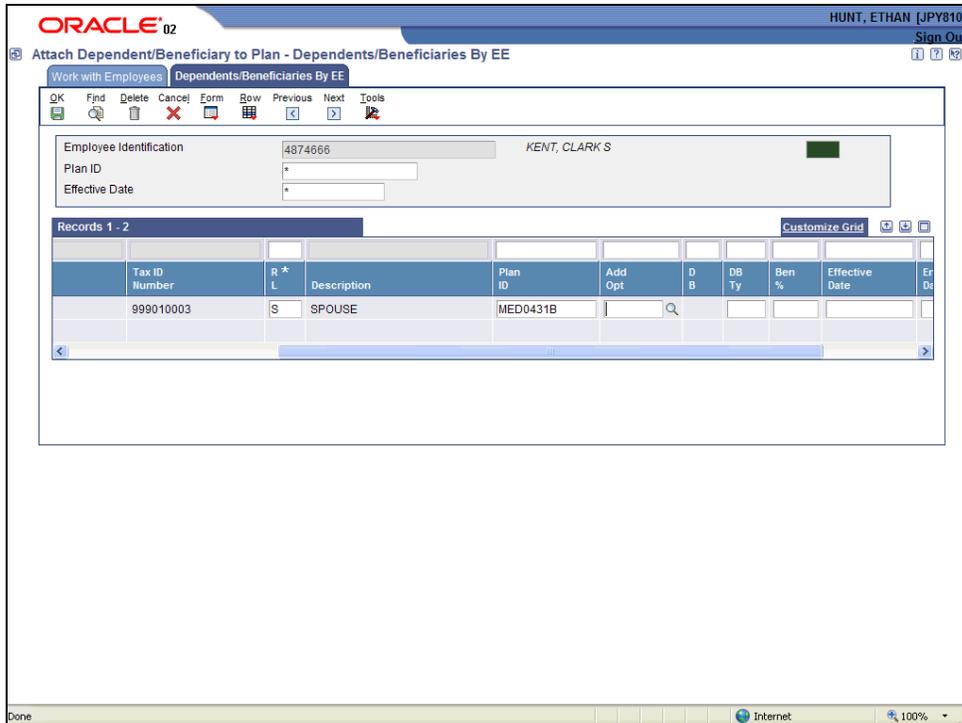
Records 1 - 2 Customize Grid

Tax ID Number	R * L	Description	Plan ID	Add Opt	D B	DB Ty	Ben %	Effective Date	Er Ds
999010003	S	SPOUSE							

Step	Action
30.	Enter the Plan ID in the Plan ID field. This needs to be the same Plan ID as the employee. Use the Visual Assist tool if necessary.

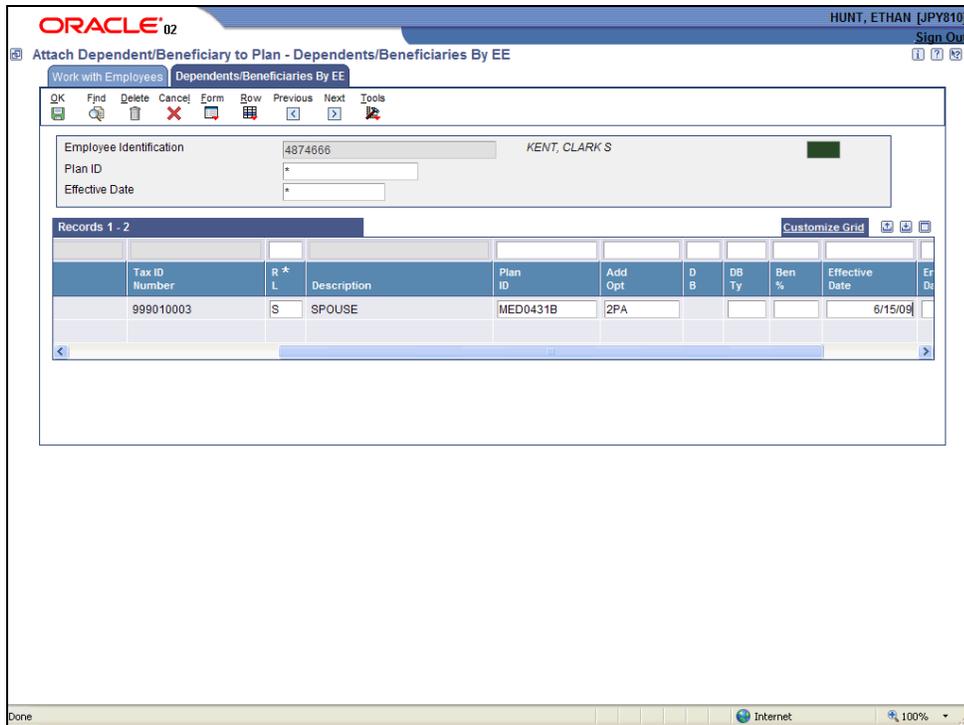
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Step	Action
31.	<p>If there is an option for the Plan ID enter it in the Add Opt field. Use the Visual Assist tool if necessary.</p> 
32.	<p>If the plan being attached is a Life Insurance plan, the DB Ty (Type) and Ben % fields must both be entered.</p> <p>For the DB Ty field enter P for Primary Beneficiary or S for Secondary Beneficiary, or use the Visual Assist tool.</p> <p>In the Ben % field enter the appropriate percentage (e.g. 100) to indicate the amount this dependent receives of the death benefits from this plan.</p>

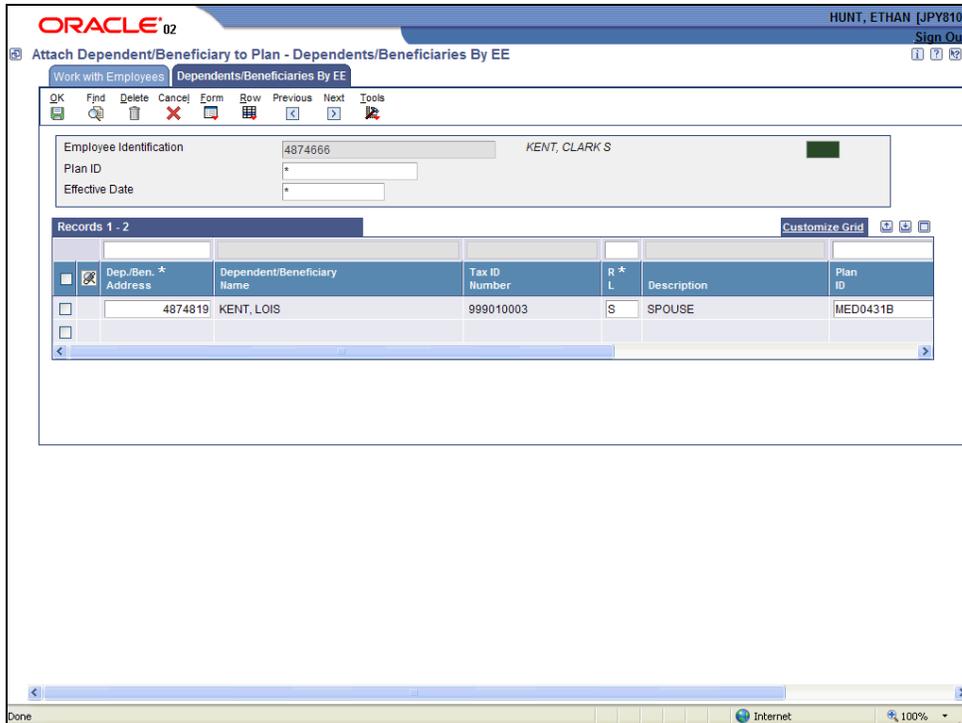
Step	Action
33.	<p>In the Effective Date field enter the same date as entered for the employee; the first date of the payroll in which you want the deduction to be effective. This depends on each agency's pay cycle.</p> <p>Note: If this dependent is a NEWBORN, enter the date of birth in the Effective Date field. This will give immediate coverage information (medical, prescription, etc.) for a NEWBORN.</p> <p>Note: If the employee is not enrolled in the plan to which you are trying to attach a dependent/beneficiary, you will receive an error message. Either ensure you have the correct code for the plan in which the employee is enrolled, or make sure the employee is actually enrolled in the plan to which you are trying to attach dependents/beneficiaries (Click Form, Enrollment Overrid to review the employee's Plan ID. Click Cancel to return to the Attach Dependent/Beneficiary to Plan window.)</p>



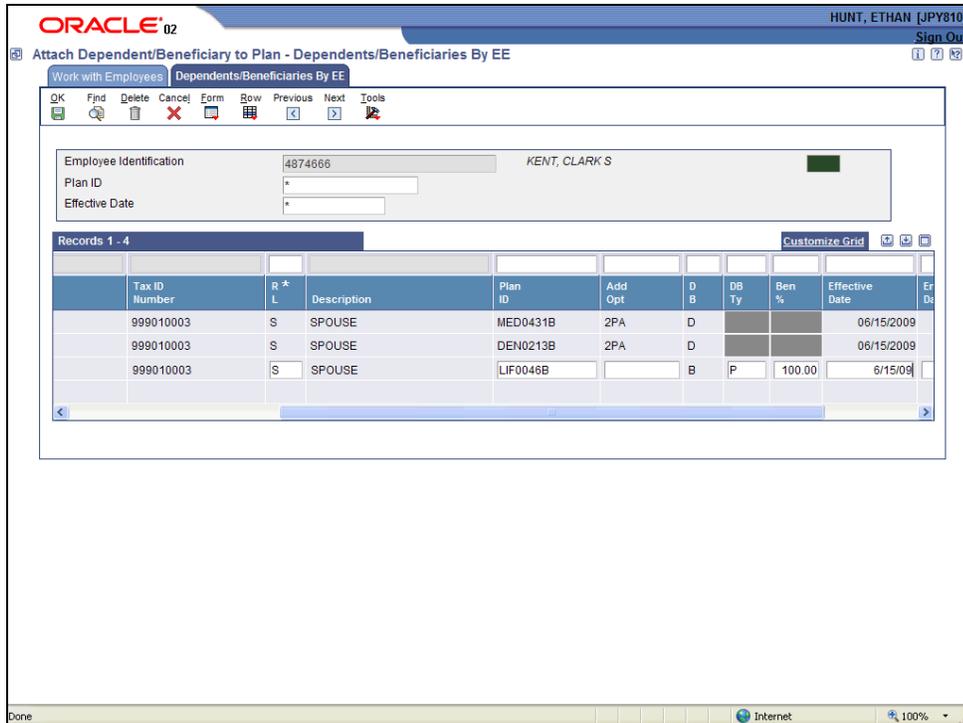
Step	Action
34.	<p>To attach another plan to this or another dependent/beneficiary scroll back to the left.</p> <div style="border: 1px solid black; width: 200px; height: 20px; margin-left: 20px;"></div>

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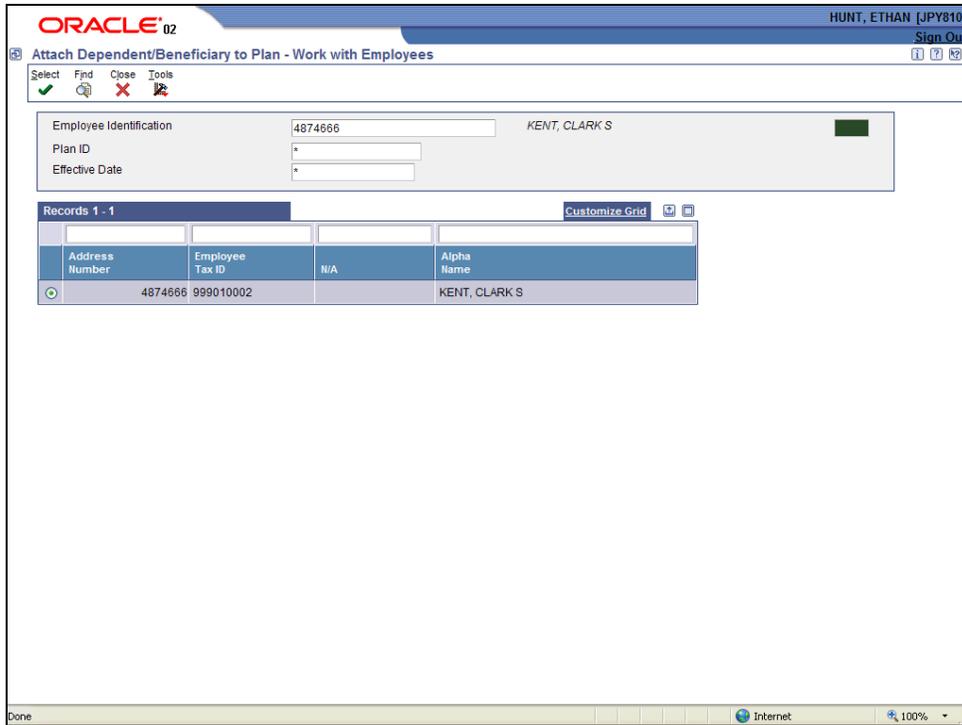
Step	Action
35.	If you are attaching another plan to this or another dependent/beneficiary click in the Dep./Ben. Address field of the next blank line and enter their address book number. Then complete the appropriate fields for the line (R L , Plan ID , etc). <div style="border: 1px solid black; width: 100px; height: 20px; margin-top: 10px;"></div>



Step	Action
36.	When you are done entering and attaching plans to ALL the employee's dependents/beneficiaries, click the OK button. (The screen will not change.) 
37.	Click the Cancel button to finish the process of attaching plans to the employee's dependent/beneficiaries. 

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Step	Action
38.	Click the Close button.
39.	You have successfully completed this lesson. End of Procedure.