

**Changing Dependent-Beneficiary Information**  
**Created on Friday, June 26, 2009**

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## Table of Contents

<b>Changing Dependent-Beneficiary Information.....</b>	<b>1</b>
<b>Changing Dependent-Beneficiary Information Overview.....</b>	<b>1</b>
<b>Changing Dependent-Beneficiary Information Lesson .....</b>	<b>1</b>
<b>Changing Only The Social Security Number Lesson.....</b>	<b>9</b>

## Changing Dependent-Beneficiary Information

### Changing Dependent-Beneficiary Information Overview

The agency Human Resources Representative has created dependent records so that an employee's dependent can participate in benefit plans, such as medical insurance. Beneficiary records have also been 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.

When changes need to be made to the dependent/beneficiary information, for example, a name change or change of address, the Address Book record for the dependent/beneficiary will need to be changed.

**Note:** Before beginning this instruction, be sure to know the employee's Address Book number the dependent/beneficiary is attached to.

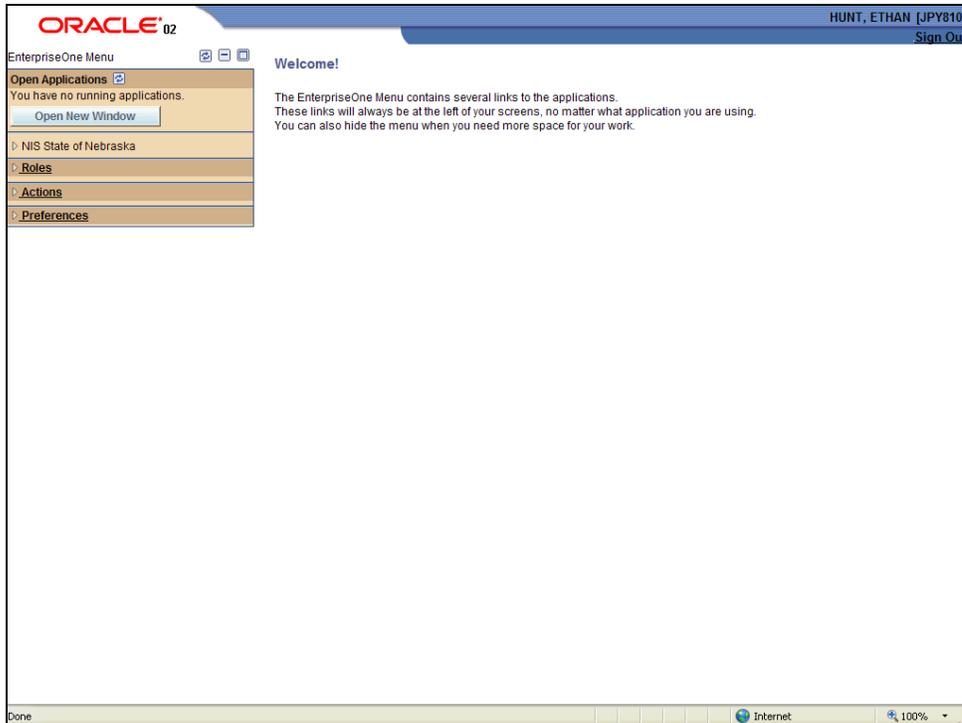
### Changing Dependent-Beneficiary Information Lesson

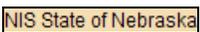
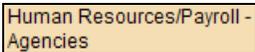
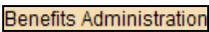
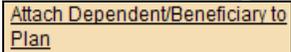
#### Procedure

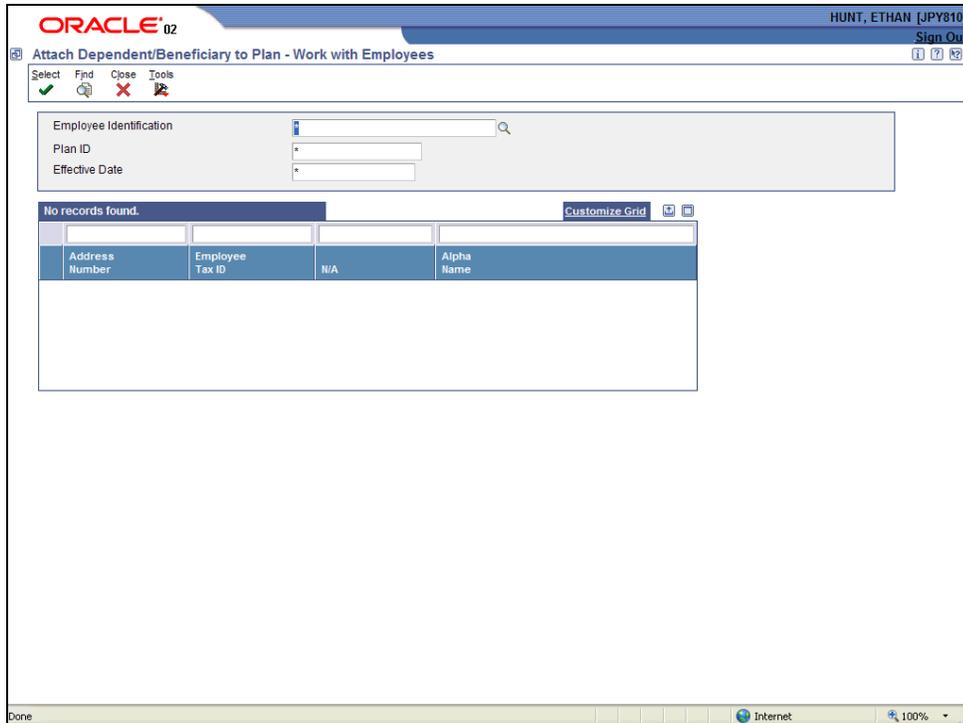
In this lesson you will learn how to change dependent/beneficiary information.

# Training Guide

## Changing Dependent-Beneficiary Information



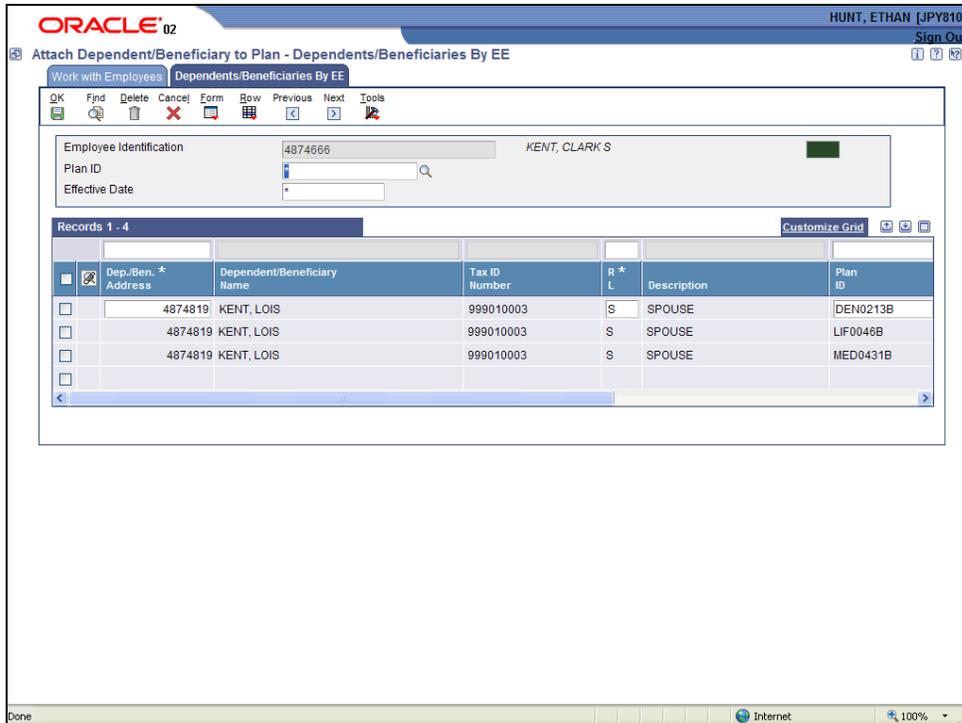
Step	Action
1.	Click the <b>NIS State of Nebraska</b> link. 
2.	Click the <b>Human Resources/Payroll - Agencies</b> link. 
3.	Click the <b>Benefits Administration</b> link. 
4.	Click the <b>Attach Dependent/Beneficiary to Plan</b> link. 



Step	Action
5.	Enter the employee's address book number in the <b>Employee Identification</b> field.
6.	Click the <b>Find</b> button. 
7.	Click the <b>Select</b> button. 

# Training Guide

## Changing Dependent-Beneficiary Information



Step	Action
8.	Check mark the row of the dependent/beneficiary you want to make a change to. <input type="checkbox"/>
9.	Click the <b>Row</b> button. 
10.	Click the <b>Dep/Ben Entry</b> menu. 
11.	<p>Make changes to any of the following fields as necessary:</p> <ul style="list-style-type: none"> <li><b>Gender</b></li> <li><b>Date of Birth</b></li> <li><b>Any other appropriate fields</b></li> </ul> <p><b>Note:</b> Gender and Date of Birth are NOT validated compared to Employee Master fields when the dependent/beneficiary is also a State of Nebraska employee.</p> <p><b>Note:</b> If the dependent/beneficiary is a trust, assign it a Male gender and use the date the trust was initiated or today's date.</p>

**ORACLE** 02 HUNT, ETHAN [JPY810] Sign Out

**Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry**

OK Cancel Form Tools

**General Information**

Address Number: 4874819 KENT, LOIS

Gender: F

Date of Birth: 8/18/09  Use Employee's Address

**School Information**

High School Graduate:  Y  N Employed:  Y  N

Full Time Student:  Y  N School Attending:

**Other Information**

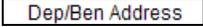
Disability Flag:  Y  N Date of Disability:

Date of Medicare:  Date of Death:

Send Initial Letter (Y/N):  Y  N Date of Notification:

**Related Employee**

Employee Identification: 4874866 KENT, CLARK S

Step	Action
12.	When you are finished making changes click the <b>Form</b> button. 
13.	Click the <b>Dep/Ben Address</b> menu. 
14.	Make changes to the following fields as necessary:  <div style="margin-left: 20px;"> <p><b>Alpha Name</b></p> <p><b>Tax ID</b></p> <p><b>Business Unit</b></p> </div>

# Training Guide

## Changing Dependent-Beneficiary Information

ORACLE 02 HUNT, ETHAN [JPY810] Sign Out

Attach Dependent/Beneficiary to Plan - Address Book Revision

OK Cancel Form Tools

Address Number 4874819

Address Book Mailing Additional Related Address Cat Code 1 - 10 Cat Code 11 - 30

Alpha Name KENT, LOIS

Long Address Number

Tax ID 999010003

Search Type Q DEPENDENT/BENEFICIARY

Business Unit 65025009 NIS

Done Internet 100%

Step	Action
15.	Click the <b>Mailing</b> tab. 
16.	Make changes to the following fields as necessary:  <b>Mailing Name</b> <b>Address Line 1</b> <b>City</b> <b>State</b> <b>Postal Code</b> <b>County</b>
17.	When you are finished making changes click the <b>OK</b> button. 

**ORACLE** 02 HUNT, ETHAN [JPY810] Sign Out

Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry

OK Cancel Form Tools

**General Information**

Address Number: 4874819 KENT, LOIS

Gender: F

Date of Birth: 08/18/2009  Use Employee's Address

**School Information**

High School Graduate:  Y

Full Time Student:  N

Employed:  Y

School Attending:

**Other Information**

Disability Flag:  N

Date of Medicare:

Send Initial Letter (Y/N):  N

Date of Disability:

Date of Death:

Date of Notification:

**Related Employee**

Employee Identification: 4874866 KENT, CLARK S

Done Internet 100%

Step	Action
18.	Click the <b>OK</b> button. 
19.	To make changes to another Dependent/Beneficiary you can repeat these steps.

# Training Guide

## Changing Dependent-Beneficiary Information



ORACLE 02 HUNT, ETHAN [JPY810] Sign Out

Attach Dependent/Beneficiary to Plan - Dependents/Beneficiaries By EE

Work with Employees Dependents/Beneficiaries By EE

OK Find Delete Cancel Form Row Previous Next Tools

Employee Identification: 4874666 KENT, CLARK S

Plan ID: \*

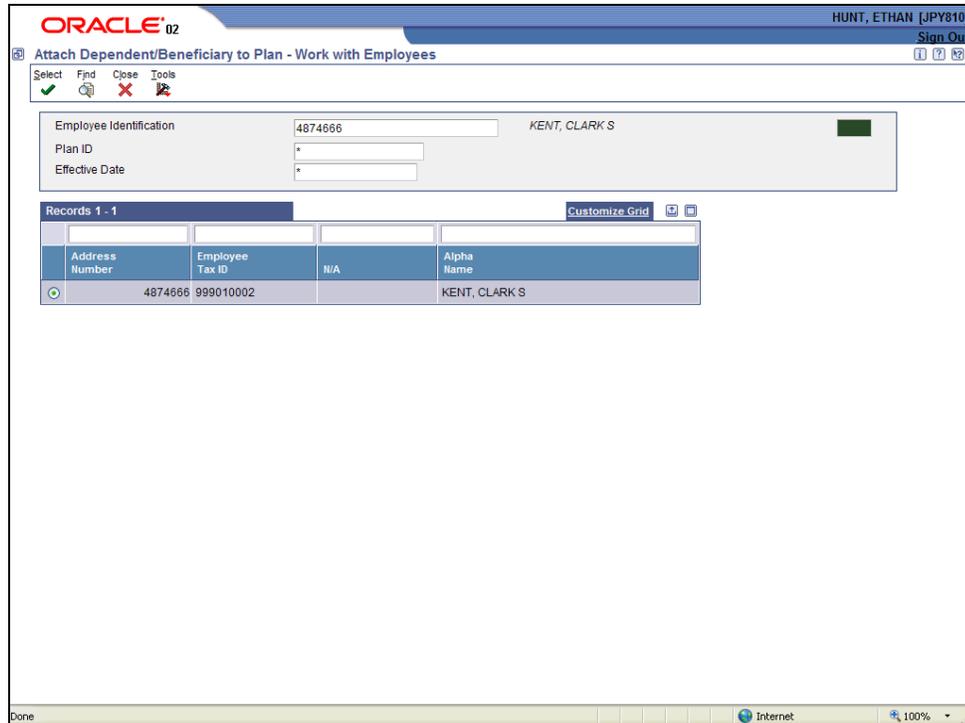
Effective Date: \*

Records 1 - 4 Customize Grid

	Dep./Ben. * Address	Dependent/Beneficiary Name	Tax ID Number	R * L	Description	Plan ID
<input checked="" type="checkbox"/>	4874819	KENT, LOIS	999010003	S	SPOUSE	DEN0213B
<input type="checkbox"/>	4874819	KENT, LOIS	999010003	S	SPOUSE	LIF0046B
<input type="checkbox"/>	4874819	KENT, LOIS	999010003	S	SPOUSE	MED0431B

Done Internet 100%

Step	Action
20.	Click the <b>Cancel</b> button. 



Step	Action
21.	Click the <b>Close</b> button. 
22.	You have successfully completed this lesson. <b>End of Procedure.</b>

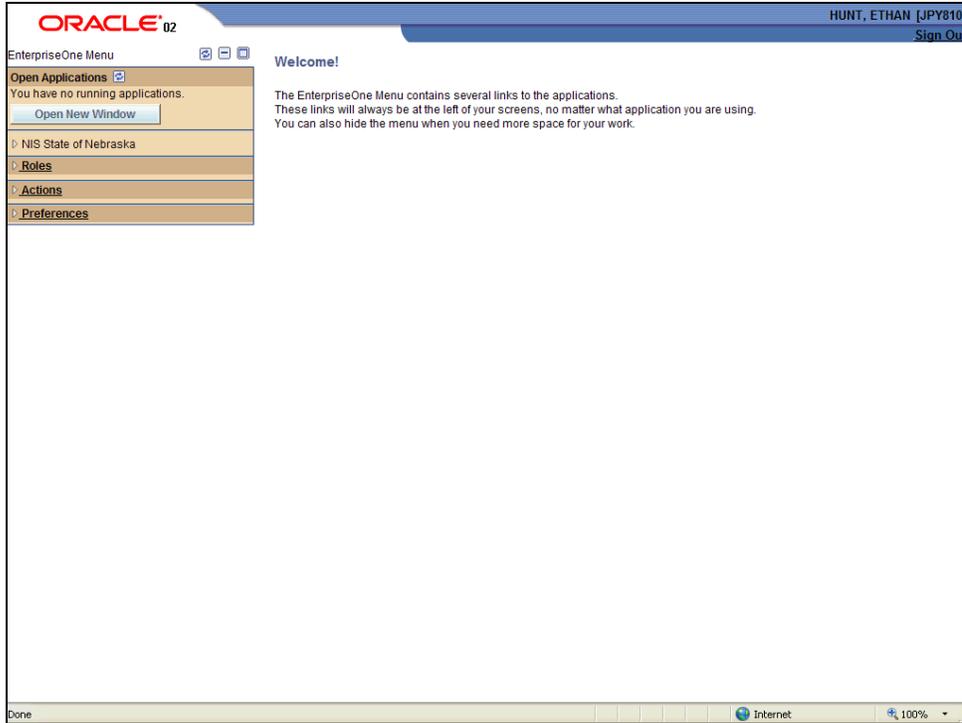
## Changing Only The Social Security Number Lesson

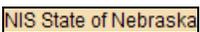
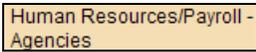
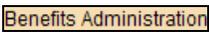
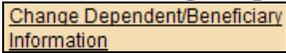
### Procedure

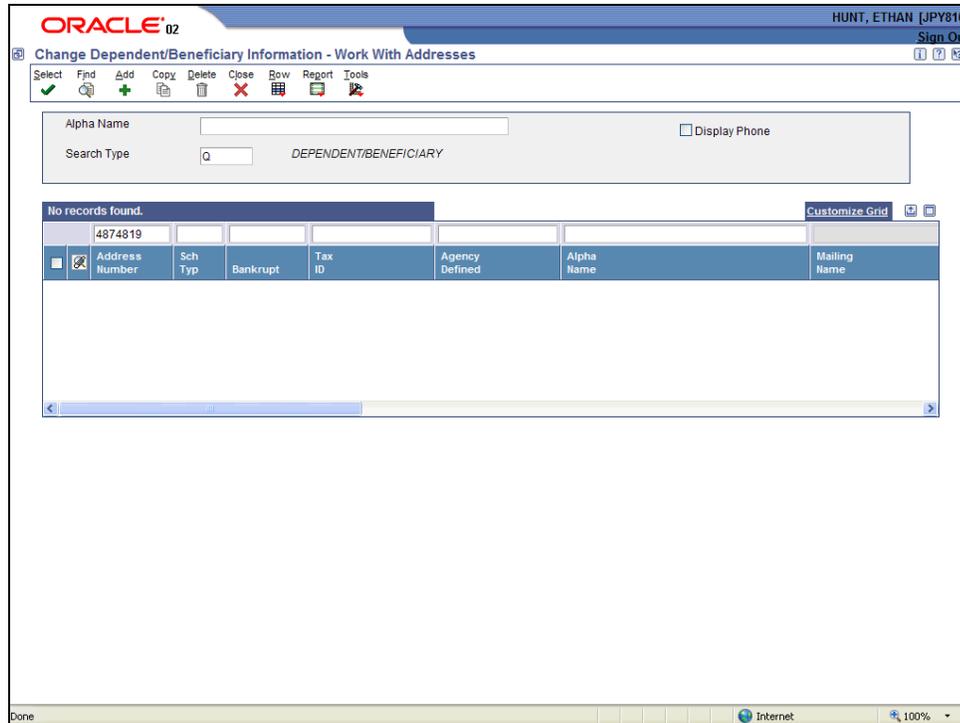
In this lesson you will learn how to change the social security number of a dependent/beneficiary.

# Training Guide

## Changing Dependent-Beneficiary Information



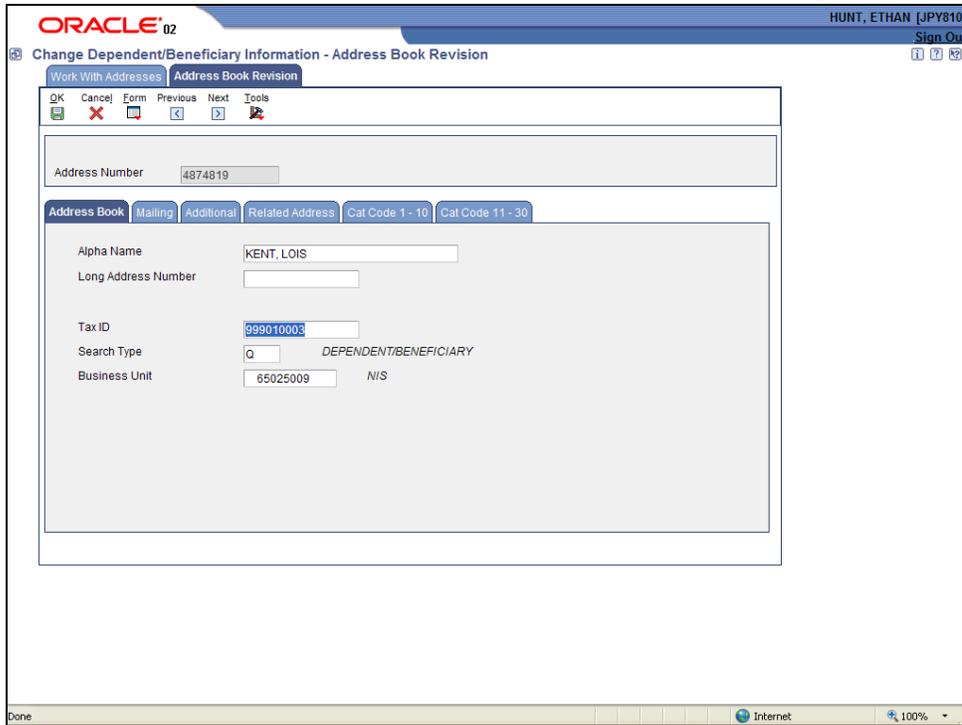
Step	Action
1.	Click the <b>NIS State of Nebraska</b> link. 
2.	Click the <b>Human Resources/Payroll - Agencies</b> link. 
3.	Click the <b>Benefits Administration</b> link. 
4.	Click the <b>Change Dependent/Beneficiary Information</b> link. 
5.	Find the dependent/beneficiary by searching for their name in the <b>Alpha Name</b> field in the header or by their address book number in the <b>Address Number</b> field in the QBE line.



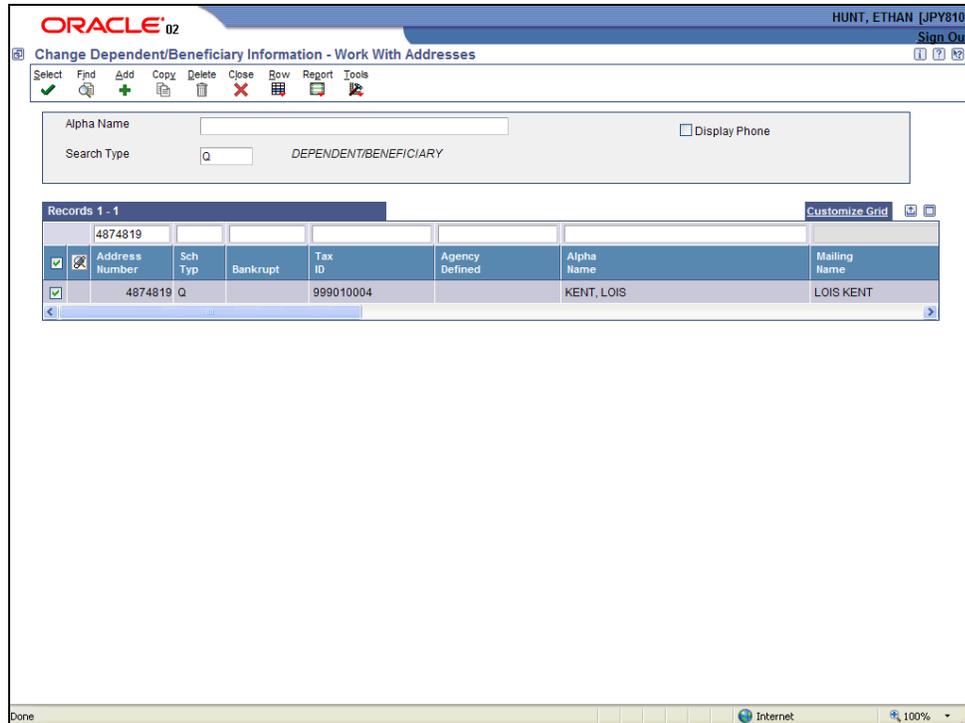
Step	Action
6.	After entering your search criteria click the <b>Find</b> button. 
7.	Select the record by clicking the check box next to it. 
8.	Click the <b>Select</b> button. 

# Training Guide

## Changing Dependent-Beneficiary Information



Step	Action
9.	Enter their correct social security number in the <b>Tax ID</b> field.
10.	Click the <b>OK</b> button. 
11.	Click the <b>Cancel</b> button. 



Step	Action
12.	Click the <b>Close</b> button. 
13.	You have successfully completed this lesson. <b>End of Procedure.</b>