Enrolling Dependent-Beneficiary

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SYSTEM POLICIES
The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

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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.)

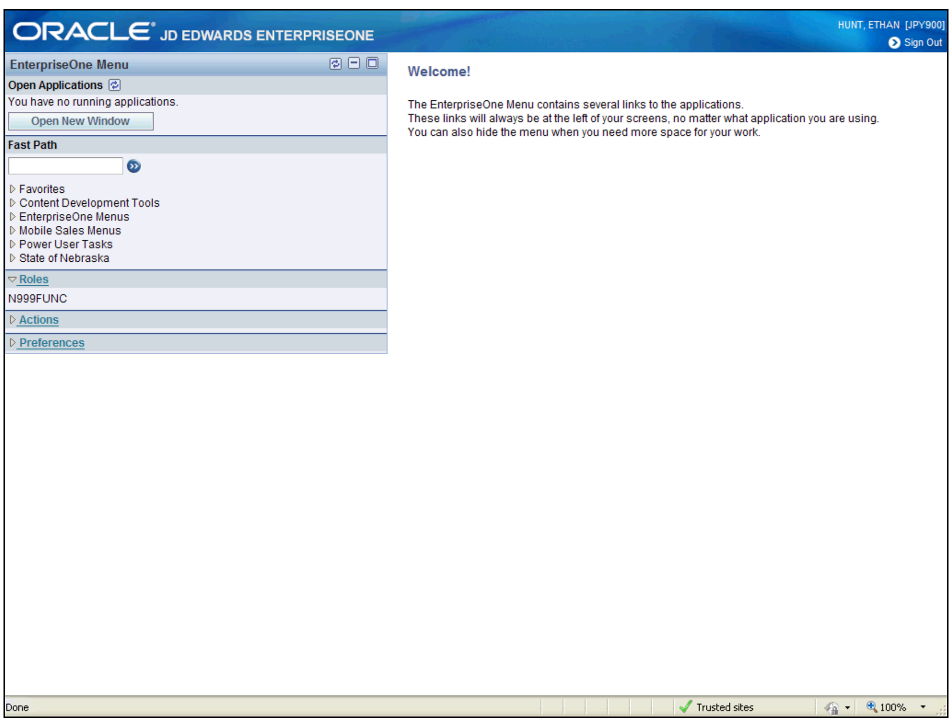
Note: Be sure to know the employee's Home Business Unit.

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.)

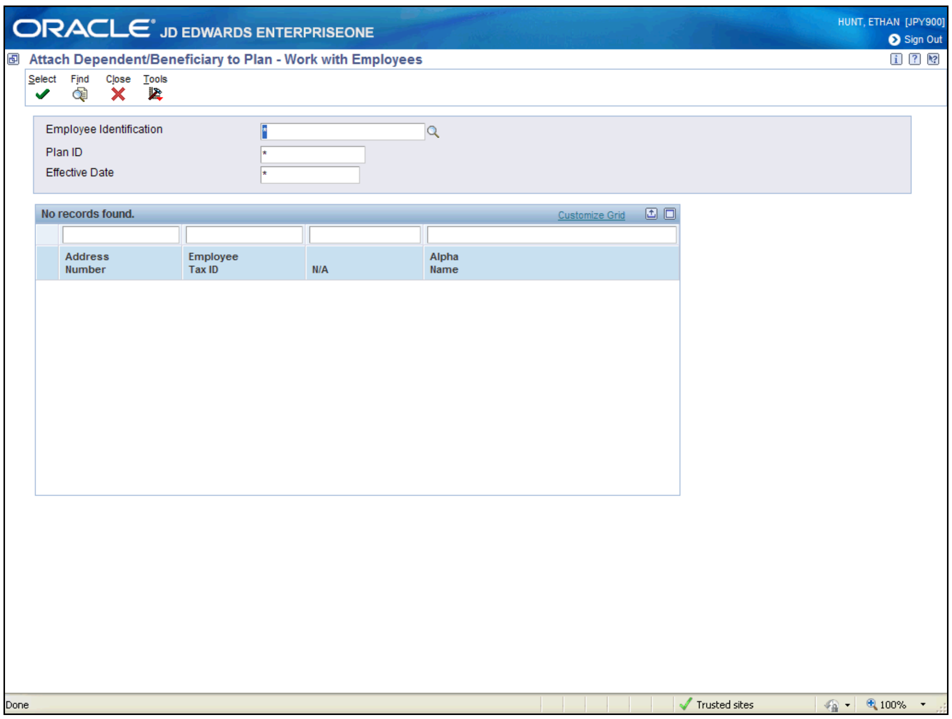
Enrolling Dependent-Beneficiary Lesson

Procedure

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

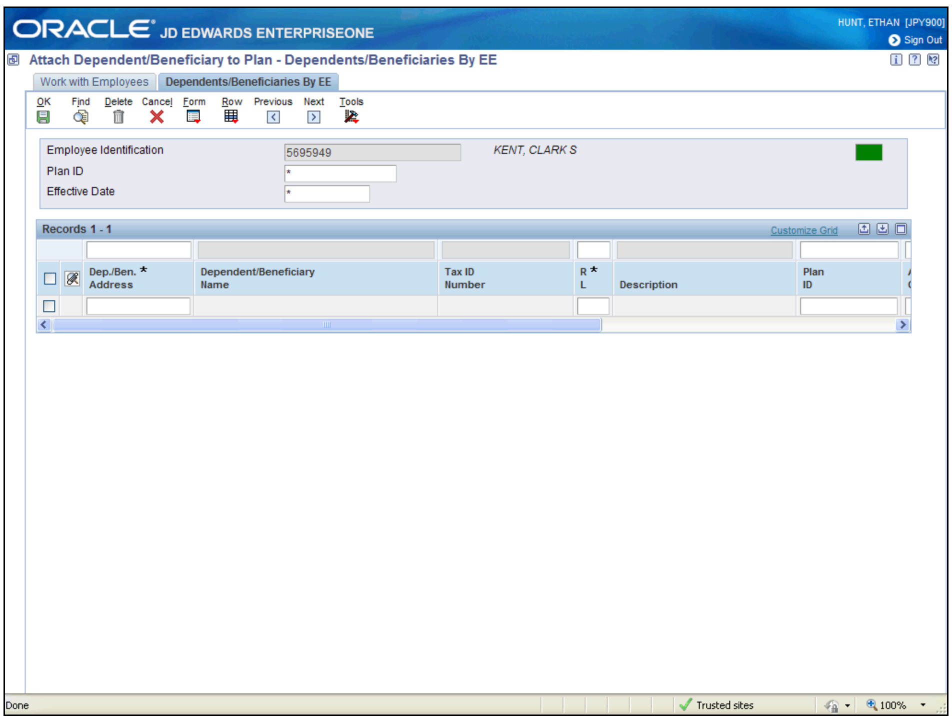


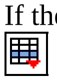
Step	Action
1.	Click the **State of Nebraska** link. State of Nebraska
2.	Click the **Human Resources** link. Human Resources
3.	Click the **Benefits Administration** link. Benefits Administration
4.	Click the **Attach Dependent/Beneficiary to Plan** link. Attach Dependent/Beneficiary to Plan

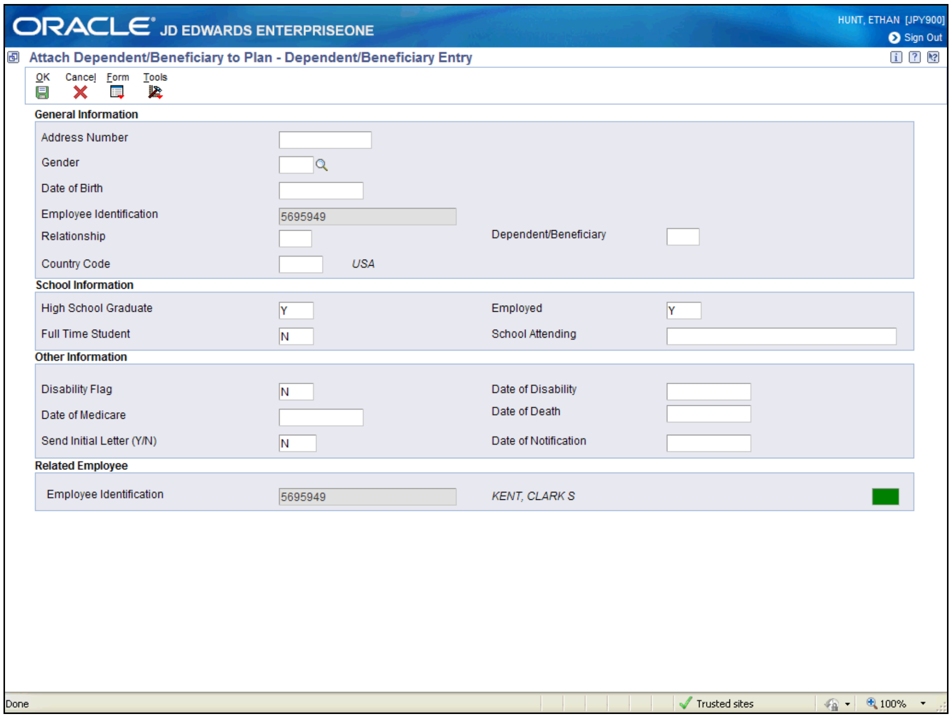


Step	Action
5.	Enter the employee's address book number in the **Employee Identification** field in the header.
6.	Click the **Find** button. 
7.	Click the **Select** button. 

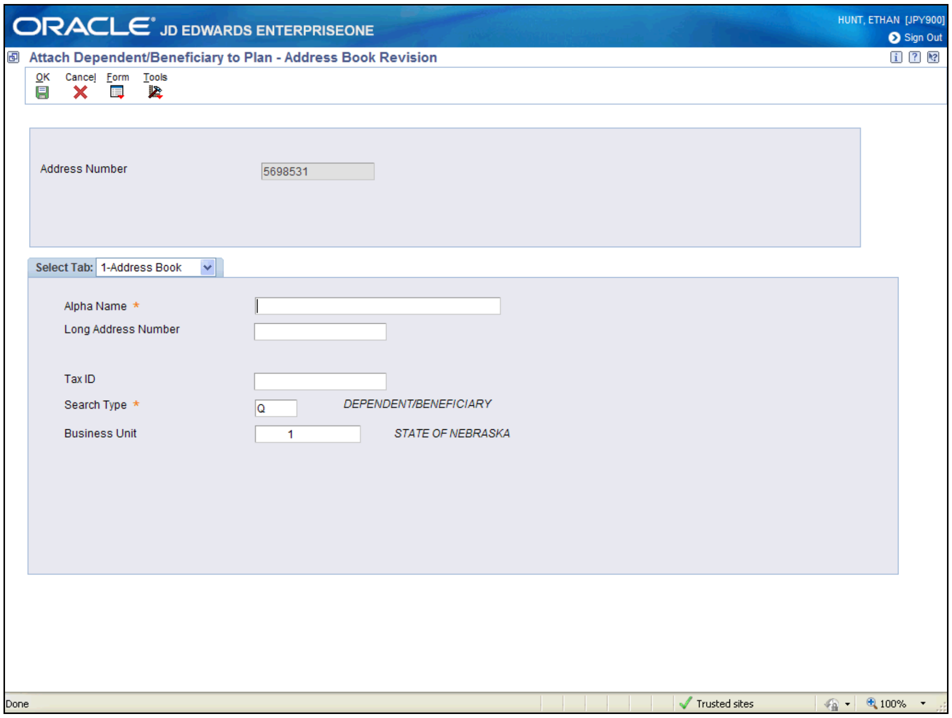
Step	Action
8.	If there are dependents listed in the grid, be sure to look for the one you want to enter. If he/she already exists in the grid, there is no need to create a new/duplicate record. Write down the number in the **Dep./Ben. Address** field and use it for any further entry involving this dependent/beneficiary. **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.

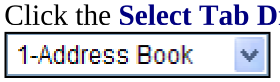
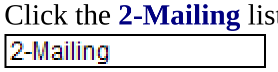


Step	Action
9.	If the dependent/beneficiary is not listed in the grid click the **Row** button. 
10.	Click the **Dep/Ben Entry** menu. 

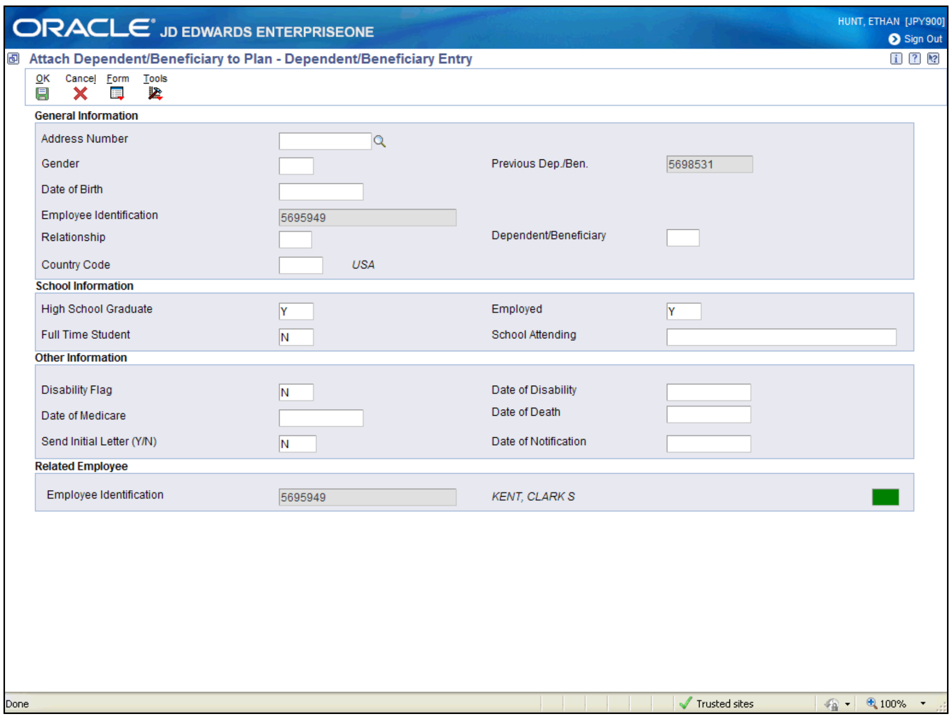


Step	Action
11.	Enter the gender for the dependent/beneficiary in the **Gender** field. **Note:** If the dependent/beneficiary is a trust, assign it a Male gender and use the date the trust was initiated or today's date.
12.	Click in the **Date of Birth** field.
13.	Enter the birthday of the dependent/beneficiary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

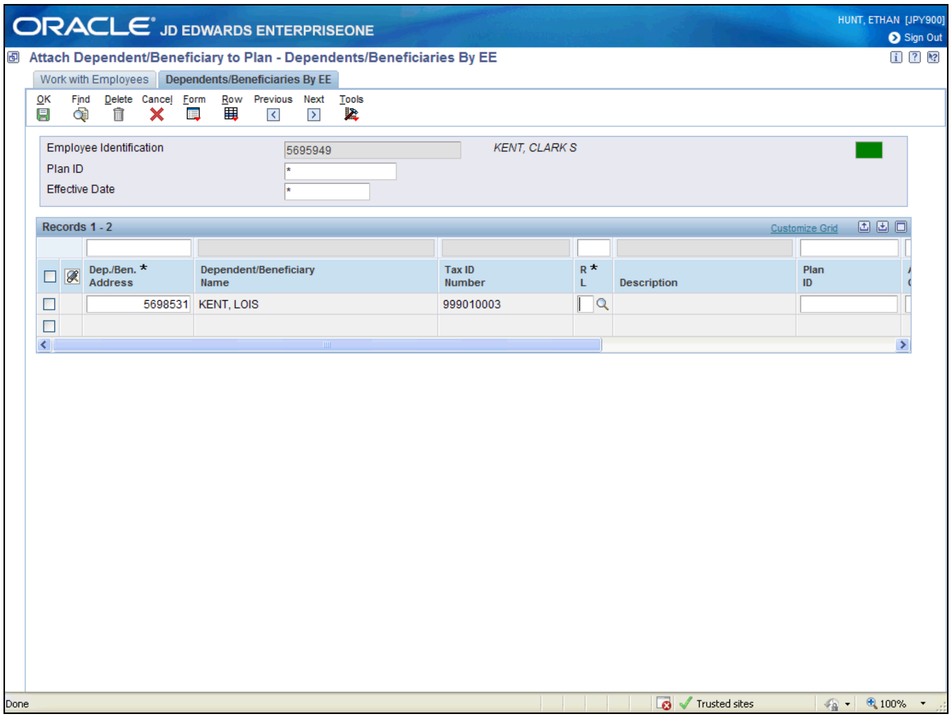


Step	Action
17.	In the **Alpha Name** field enter their name using ALL CAPS with their last name followed by their first name (ex. LASTNAME, FIRSTNAME).
18.	In the **Tax ID** field enter the dependent/beneficiary's social security number. **Note:** When entering a newborn dependent/beneficiary for whom a social security number has not yet been assigned, enter "NEWBORN" When entering a trust or estate that has not yet been issued a number, enter "TRUST" When the employee does not know the dependent/beneficiary social security number, enter "PENDING" When the dependent/beneficiary does not allow use of their social security number, or they are unable to provide it, use "UNAVAILABLE"
19.	In the **Business Unit** field enter the employee's Home Business Unit. Use the **Visual Assist** tool if necessary.
20.	Click the **Select Tab Drop Down** list. 
21.	Click the **2-Mailing** list item. 

Step	Action
22.	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). **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.
23.	The address of the employee will be prefilled in the address fields for the dependent/beneficiary. You can change the address on this screen if you need to.
24.	Click the **OK** button.

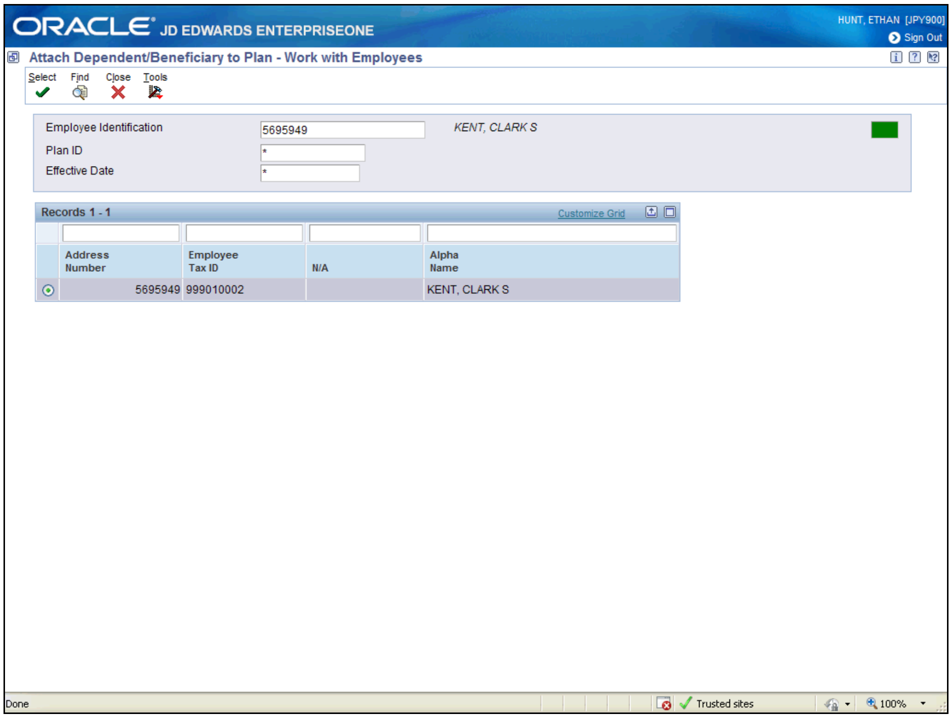


Step	Action
25.	Click the **Cancel** button.
26.	The dependent/beneficiary you added is displayed in the **Dependent/Beneficiary Name** field. You can add additional dependents/beneficiaries by following the previous steps (**Row**, **Dep/Ben Entry**, etc).



Step	Action
27.	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. 
28.	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.
29.	Click in the **Add Opt** field.
30.	If there is an option for the Plan ID enter it in the **Add Opt** field. Use the **Visual Assist** tool if necessary. 
31.	If the plan being attached is a Life Insurance plan, the **DB Ty** (Type) and **Ben %** fields must both be entered. For the **DB Ty** field enter **P** for Primary Beneficiary or **S** for Secondary Beneficiary, or use the **Visual Assist** tool. 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.

Step	Action
32.	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. **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. **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.)
33.	To attach another plan to this or another dependent/beneficiary scroll back to the left.
34.	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).
35.	When you are done entering and attaching plans to ALL the employee's dependents/beneficiaries, click the **OK** button. (The screen will not change.)
36.	Click the **Cancel** button to finish the process of attaching plans to the employee's dependent/beneficiaries.



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