Enrollment of 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.

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.)

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

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.)

This work instruction shows how to:

Add Dependent/Beneficiary to Employee Benefit Plans

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. 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: http://www.das.state.ne.us/

Navigation

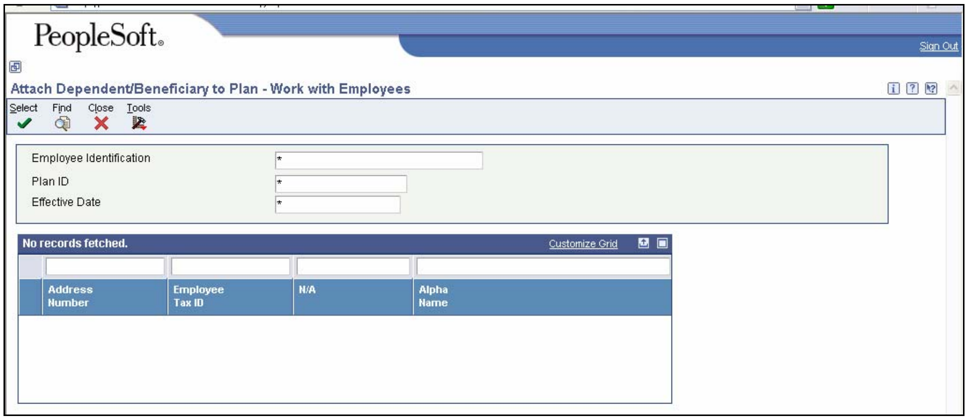
Click Roles, HR_PR .
(Citrix users – right click on the menu, choose Apply Roles, choose HR_PR.)

Human Resources and Payroll - Agencies > Benefits Administration > Attach Dependent/Beneficiary to Plan

Steps

Add Dependent/Beneficiary to Employee Benefit Plans

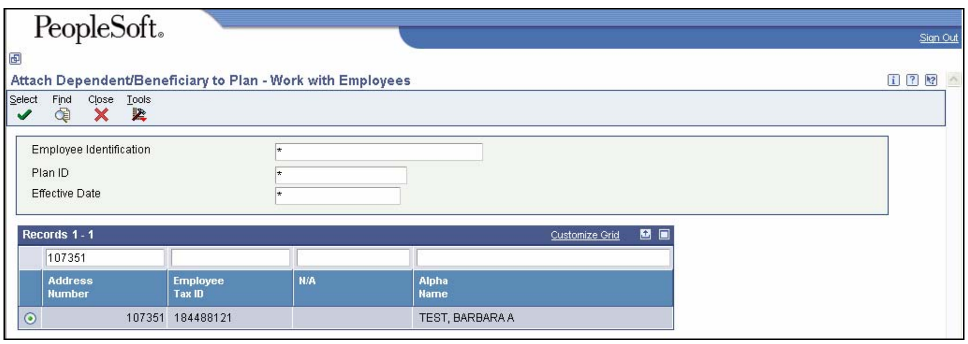
Start this instruction from the Attach Dependent/Beneficiary to Plan - Work with Employee window.



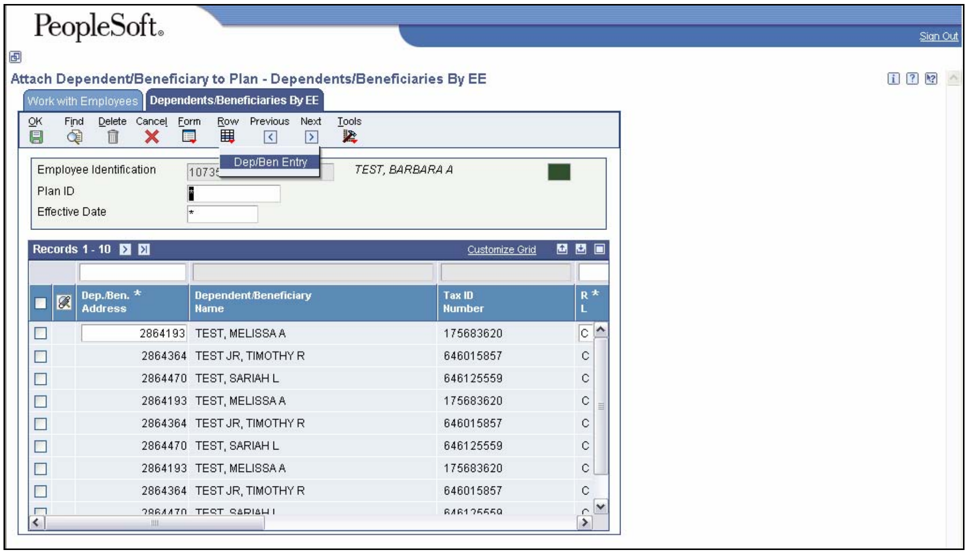
1. Enter the **Employee's address book number** in the Employee Identification field in the header.

You can also search by entering the **employee’s name** IN ALL CAPS in the **Alpha Name field** in the QBE line. (ex. *LASTNAME, FIRSTNAME*).

2. Click **Find**.



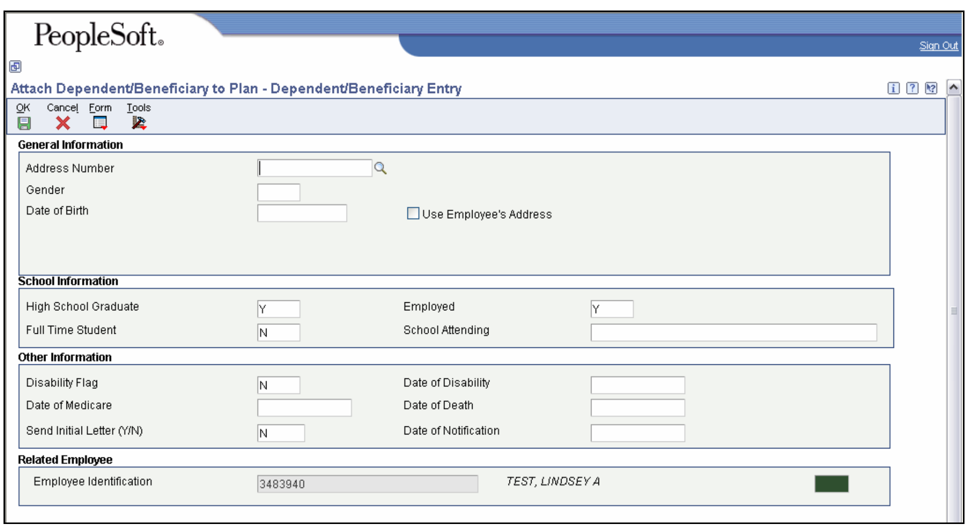
3. Choose the appropriate row in the grid, click **Select**. The Attach Dependent/Beneficiary to Plan - Dependents/Beneficiaries by EE window appears.



4. 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 this number** and use it for any further entry involving this dependent/beneficiary.

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.

5. If the dependent/beneficiary is not listed in the grid, click **Row, Dep/Ben Entry**. The Attach Dependent/Beneficiary to Plan - Dependents/Beneficiaries Entry window appears.



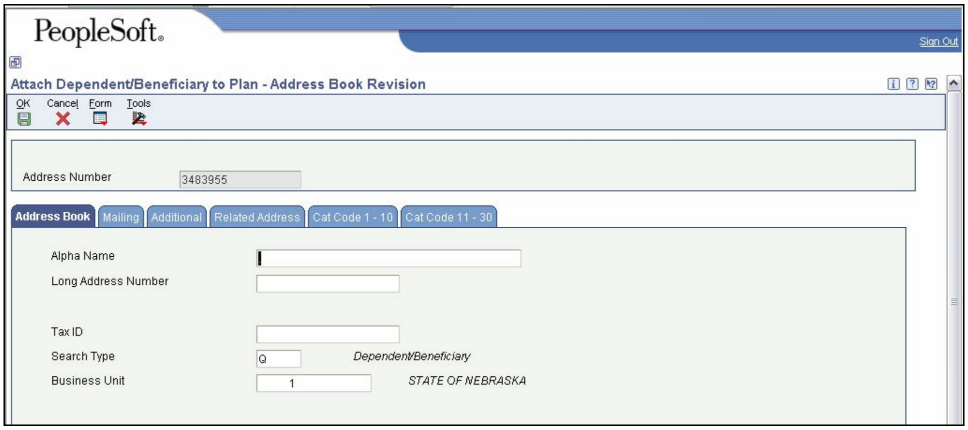
6. Complete the following fields:

- Gender (required)
- Date of Birth (required)

- School Attending – If the Full Time Student field has a Y then this field is required.
- Any other appropriate fields

If the dependent/beneficiary is a trust, assign it a Male gender and use the date the trust was initiated or today's date.

7. Click **OK**. The Attach Dependent/Beneficiary to Plan - Address Book window appears.



Notice that the system has assigned an Address Book number for this dependent/beneficiary (see Header information). **Write down this number** for further reference.

Also notice that the Search Type is automatically assigned as a "Q" (Dependent/Beneficiary) Address Book record.

8. Complete the following fields on the Address Book tab:

- Alpha Name - use ALL CAPS (ex. LASTNAME, FIRSTNAME)

  For more information on how to properly enter a name in the address book, please refer to the Entering Information in the Address Book for HR Quick Reference Card.

- Tax ID – dependent/beneficiary's social security number.
  - 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"

9. Click into the **Business Unit field and then click on the Visual Assist** Icon (flashlight) to view the options available to enter into this field. The Business Unit Mast Search window appears.

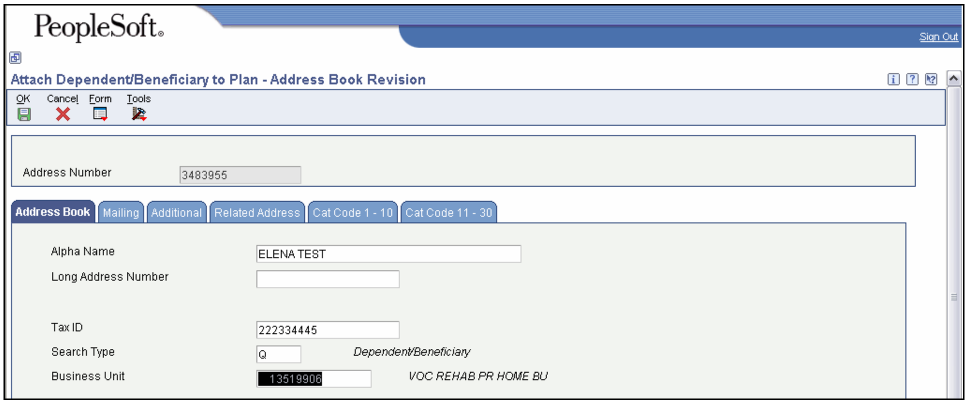
You will be looking for the **employee's Home Business Unit**.

10. In the Business Unit field in the QBE line, enter ***##*** (using the agency number as the #'s with asterisks before and after) (ex. *65*).

11. In the Agency Number field in the QBE line, enter "0##" (using the agency number as the #'s with an asterisk at the end (Ex. 065*).

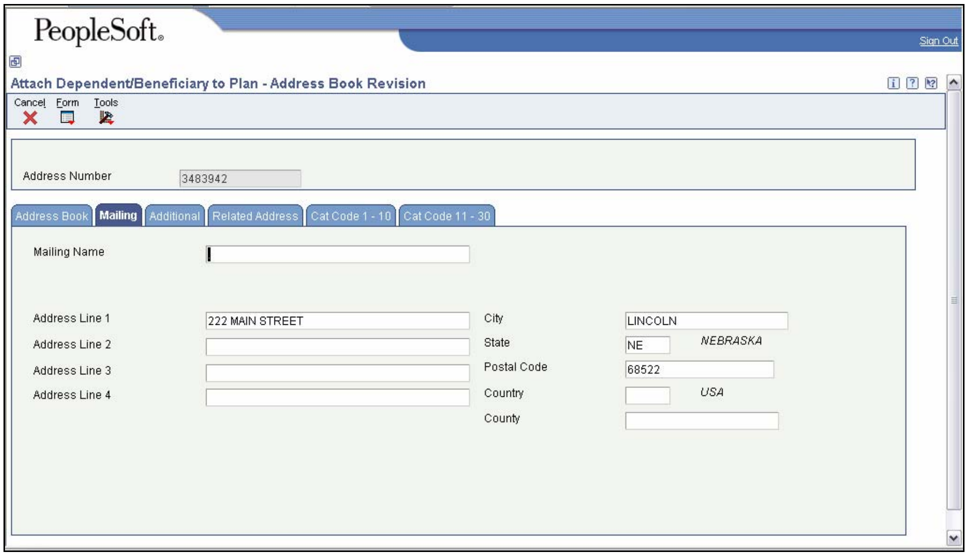
12. Click **Find**.

13. Click on the radio button to the left of the **employee's Home Business Unit** (ex. 650080000, DAS-STATE PERSONNEL). Click **Select**.



Note that the Employee's Home Business Unit appears in the Business Unit field.

14. Click on the **Mailing Tab.**



15. Complete the following fields:

- Mailing Name - ALL CAPS (ex. FIRSTNAME LASTNAME)

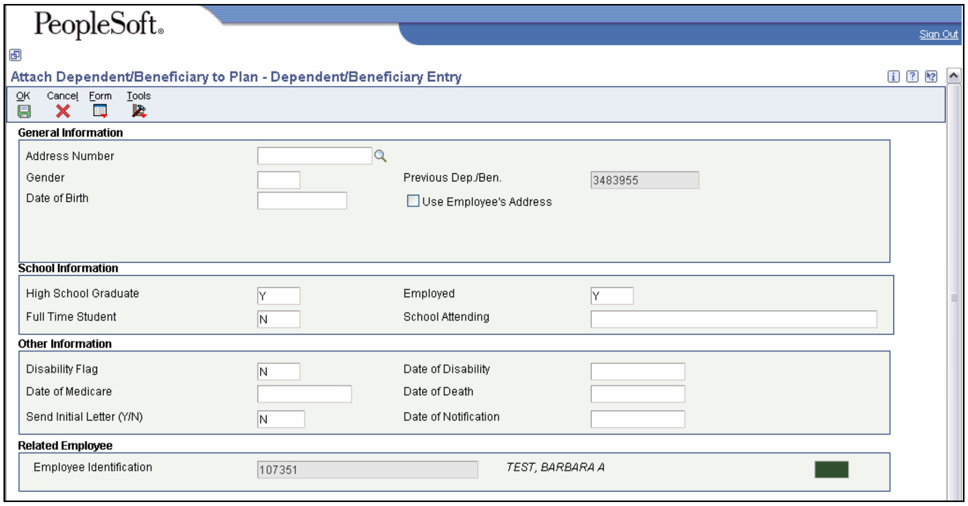
  This field is very important and must be entered accurately as this is what is used by the vendors to create benefit ID cards.

  For more information on how to properly enter a name in the address book, please refer to the Entering Information in the Address Book for HR Quick Reference Card.

- Address Line 1 - enter the dependent/beneficiary's street address
- City
- State
- Postal Code
- County

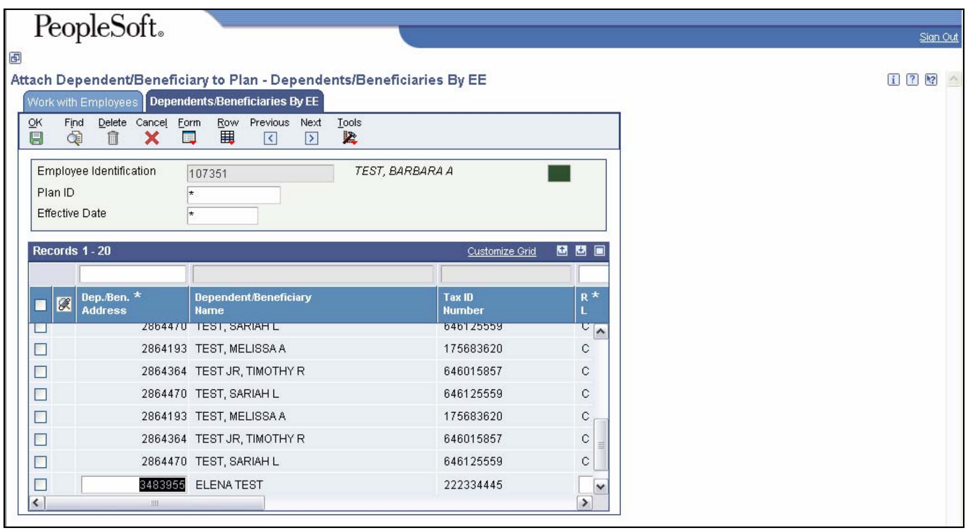
Do not use punctuation when entering these fields.

16. Click **OK**. You will return to the Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry window.



17. The system brings up a blank screen to allow you to enter another dependent/beneficiary. To enter another dependent/beneficiary, repeat steps 6-15. If you are done entering dependents/beneficiaries, continue to the next step.

18. Click **Cancel** to return to the Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary by EE window and continue attaching this dependent to the plan(s) the employee enrolled in.

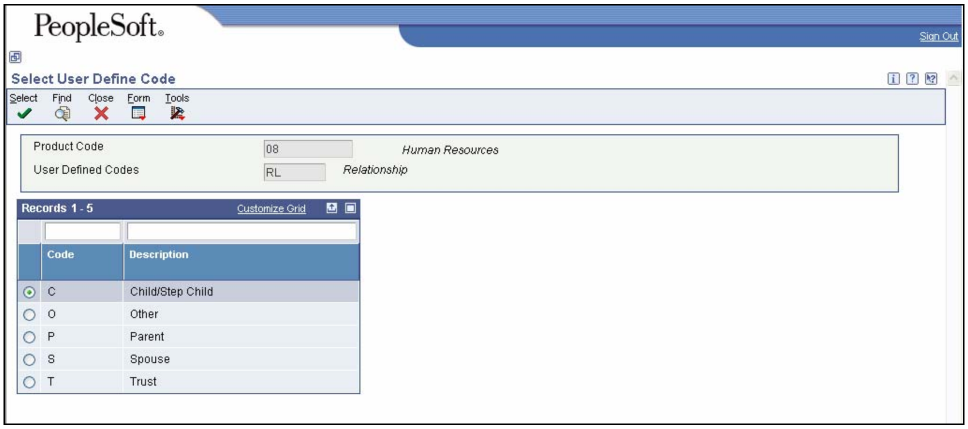


Already appearing in this grid is the last dependent/beneficiary that you entered for this employee.

To enter a row for a new dependent/beneficiary, enter their Q address book number and continue with the instructions below.

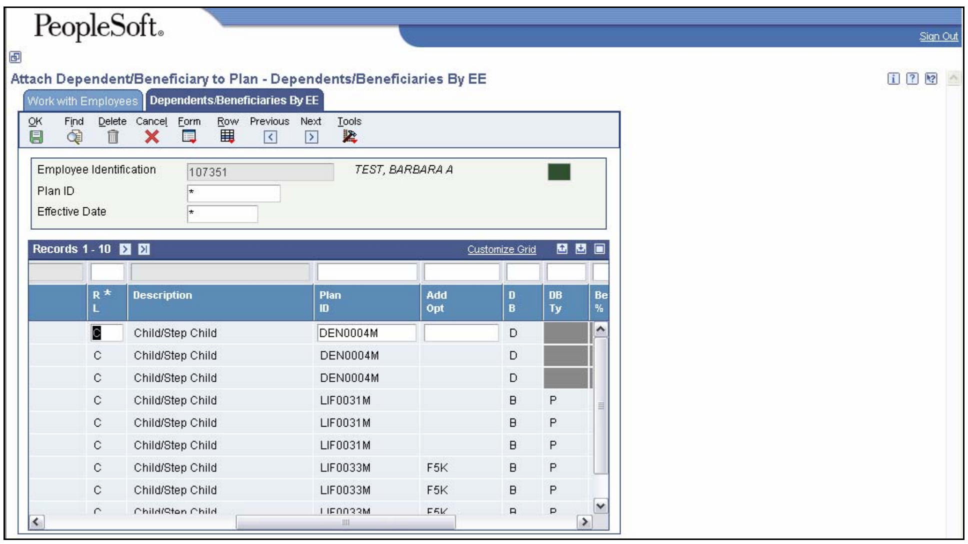
19. Click in the **RL** (Relationship) field to assign a relationship (spouse, child, parent, trust, other) to this dependent/beneficiary.

20. Click the **Visual Assist icon in the RL field**. The Select User Define Code window appears.

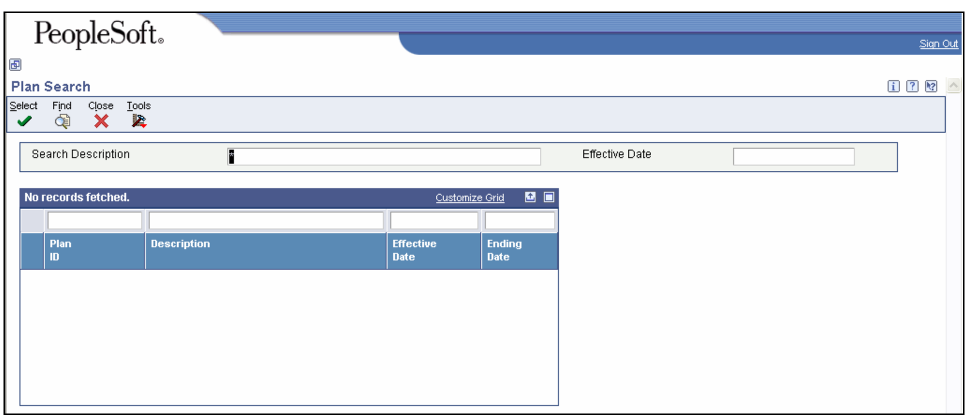


21. These are the RL options available. The first row of the grid is automatically highlighted. If you would like to choose another option, click on the appropriate radio button in the grid, and click **Select**. You will return to the Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary by EE window will appear.

22. Click in the **horizontal scroll bar** to see the rest of the grid to the right.

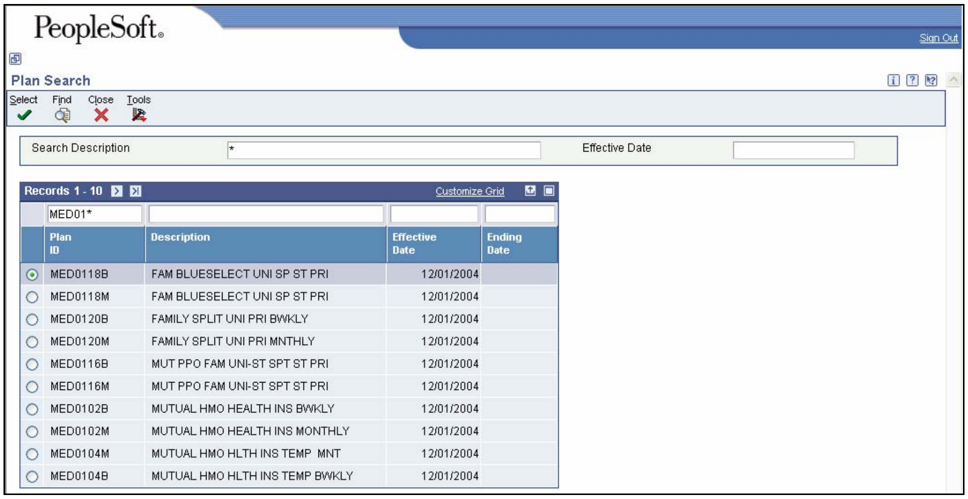


23. Click in the **Plan ID field** and enter the Plan ID (from the employee) **or click on the Visual assist** icon. The Plan Search window appears.



24. Since Human Resources staff know the plans to attach dependents/beneficiaries to (based on the employee's submitted paper enrollment forms), search on the plans to determine the Plan ID. Enter the **Plan ID** in ALL CAPITAL LETTERS followed by an asterisk (ex.MED01*) in the Plan ID field of the QBE line to narrow the search.

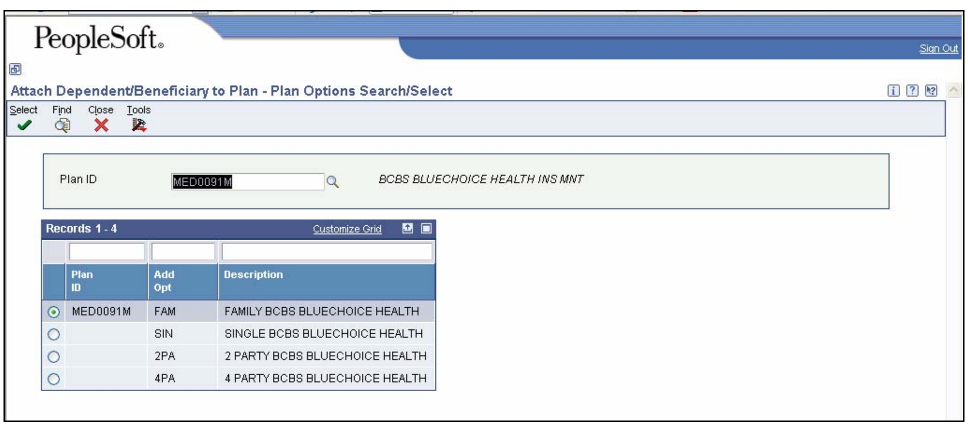
25. Click **Find**.



26. Click the **Right Arrow** next to Records 1-10 just above the grid to see the rest of the entries in the grid.

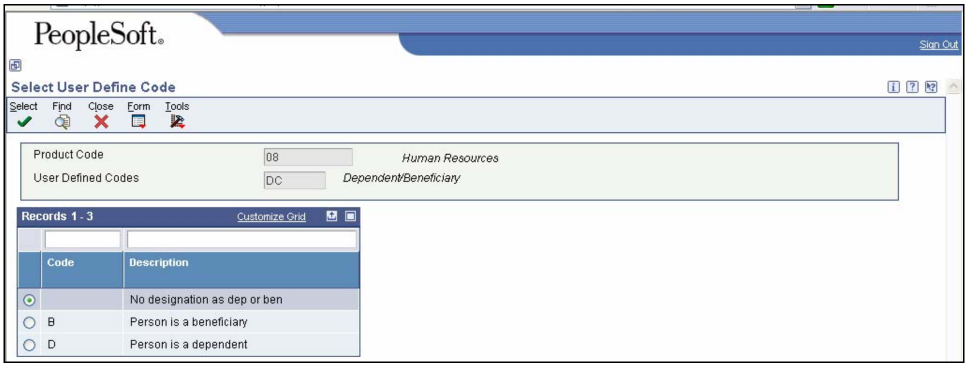
27. Compare the Plan IDs to the plan the employee has elected. Click the radio button next to the **Plan ID** the employee has elected, click **Select**.

28. If there is an option for the plan ID, click in the **Add Opt field and then click on the Visual Assist** icon. The Attach Dependent/beneficiary to Plan – Plan Options window appears.



29. Click the radio button next to the **type of coverage the employee has elected** via paper enrollment forms, click **Select**. You will return to the Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary by EE window.

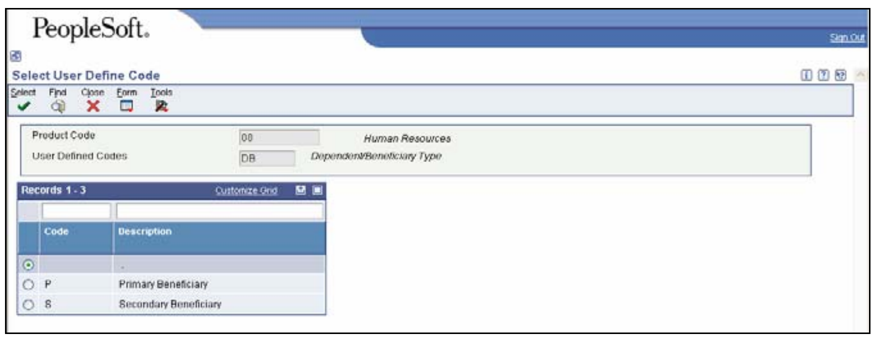
30. Click in the **DB field and then click on the Visual Assist icon**. The Select User Define Code window appears.



31. Click the radio button next to the option you choose. A Dependent is covered for Medical, Dental, and Vision plans. A Beneficiary receives death benefits from Life insurance plans.
32. Click **Select**. You will return to the Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary by EE window.

If the plan being attached is a Life Insurance plan, **DB Type** and **Ben %** must both be entered.

Click into the DB Type field, then click the Visual Assist icon. The Select User Define Code window appears.



Choose the **Dep/Ben type** from the grid by clicking on the appropriate radio button, then click **Select**.

Enter the appropriate **percentage** (e.g. 100) in the **Ben %** field to indicate the amount this dependent receives of the death benefits from this plan.

33. Click into the **Effective Date** field and 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.

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.

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.)

34. Repeat steps 5-32 to enter new dependents for this plan. To attach another plan to this dependent (Life, Dental, Vision, etc.), repeat steps 18-32. If finished entering/attaching dependents, continue to the next step.
35. When you are done entering and attaching plans to ALL the employee's dependents/beneficiaries, click **OK**. (The screen will not change.) Click **Cancel** to finish the process of attaching plans to the employee's dependent/beneficiaries. You will return to the Attach Dependent/Beneficiary to Plan - Work with Employee window.
36. Click **Close**.