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.

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

This work instruction shows how to:

Change Dependent/Beneficiary Information

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

🖊 If you need to only change the Social Security number of a dependent/beneficiary who also has an employee record, use the following menu path and start on step 9 of this Work Instruction.

Human Resources and Payroll – Agencies > Benefits Administration > Change Dependent/Beneficiary Information

Steps

Change Dependent/Beneficiary Information

Start this instruction from the Attach Dependent/Beneficiary to Plan - Work with Employee window.
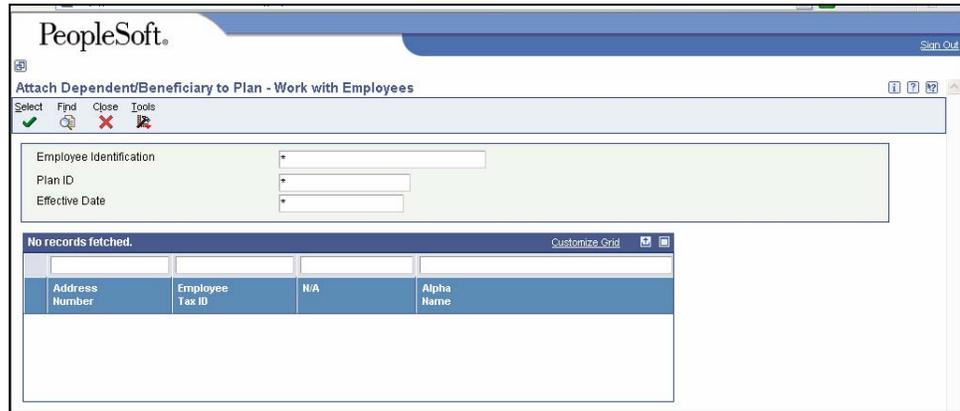
1. Enter the Employee's address book number in the Employee Identification field in the header.

    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. Choose the row of the dependent/beneficiary that needs to be changed.

5. Click **Row, Dep/Ben Entry**. The Attach Dependent/Beneficiary to Plan - Dependents/Beneficiaries Entry window appears.

6. Make changes to any of the following fields:

    - Gender

    - Date of Birth

    - Any other appropriate fields

    ✏ Gender and Date of Birth are NOT validated compared to Employee Master fields when the dependent/beneficiary is also a State of Nebraska employee.

    ✏ 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. If no other changes need to be made, proceed to step 13.

8. If changes need to be made to the Address Book record, click **Form, Dep/Ben Address**. The Attach Dependent/Beneficiary to Plan – Address Book window appears.
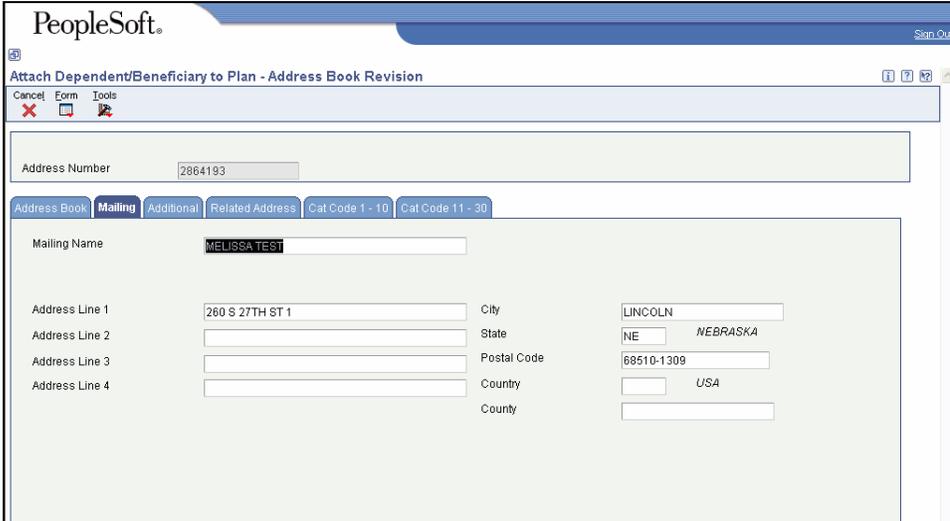

9. Make changes to any of the following fields:

    - 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.

• Business Unit - use the employee's Home Business Unit

✏ Click on the visual Assist Icon (flashlight) in the Business Unit field to view the options available to enter into this field.

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

   • Enter 0## (using the agency number as the #'s) in the Agency Number field in the QBE line (ex. 065).

   • Click **Find**.

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

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

10. Click on the Mailing Tab.

11. Make any changes to the following fields:

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

✏ 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.

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

13. Click **OK.** You will return to the Attach Dependent/Beneficiary to Plan – Dependents/Beneficiaries by EE window.

🖉 To make changes to another Dependent/Beneficiary, repeat steps 4-13.

14. Click **Cancel**. You will return to the Attach Dependent/Beneficiary to Plan – Work with Employees window.

15. Click **Close**.