



## Business Process Document Benefits Administration: Beneficiary Designations

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<b>Responsibility/Role</b>	
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### Beneficiary Designations

Employees use the **Benefits Summary** and **Insurance Summary** pages to review all their benefits information, including health plans, insurance, savings plans, flexible spending accounts, and dependent and beneficiary information. Each of the benefit pages displays more detailed information about the specific plan-type, and includes links to additional benefit information.

This topic assumes that the employee has completed the enrollment process, and is accessing the benefits pages to review summarized benefits information.

Please refer to: [http://www.maine.edu/pdf/BeneficiaryDesignations\\_qg.pdf](http://www.maine.edu/pdf/BeneficiaryDesignations_qg.pdf)

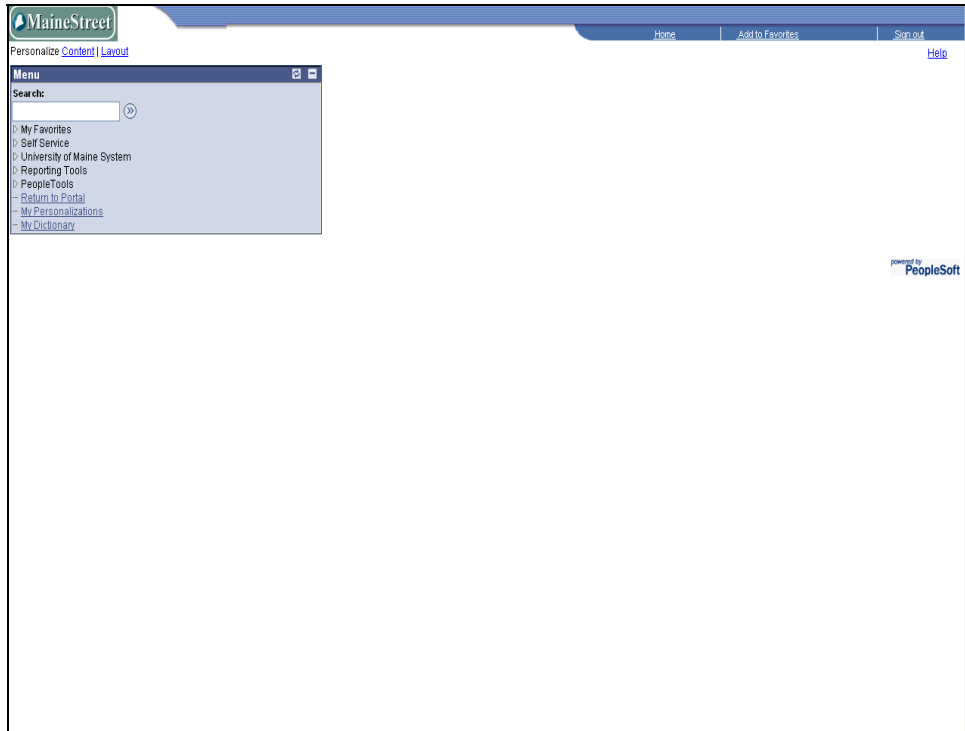
Please refer to: <http://www.maine.edu/pdf/UsingUPK.pdf>


### Additional Information

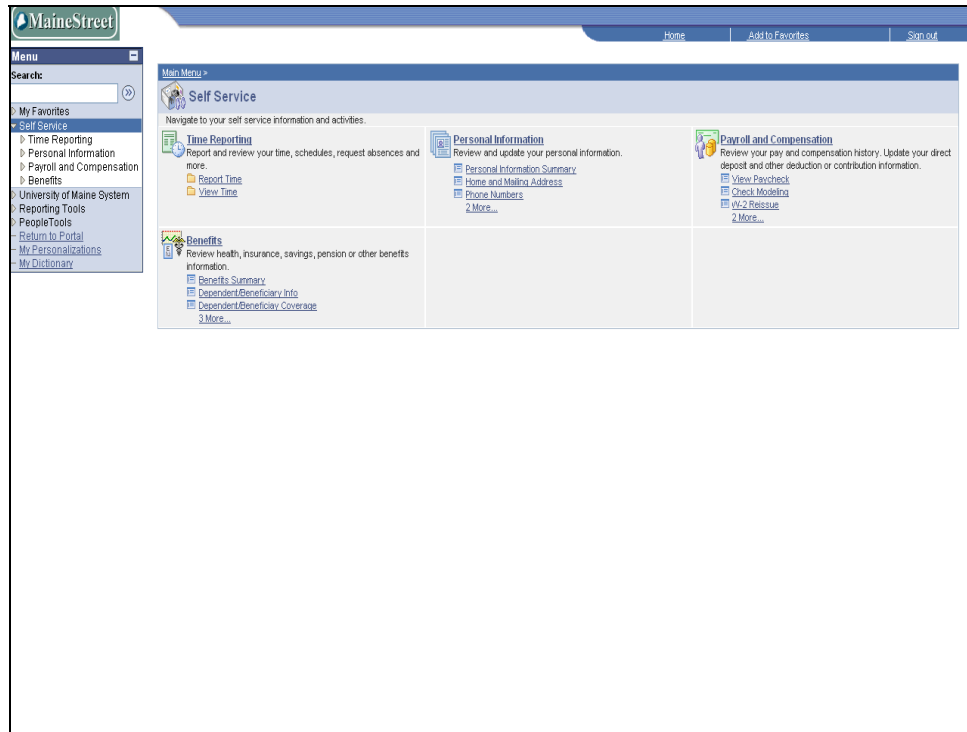
Beneficiaries can be updated anytime in MaineStreet.



Retirement plan beneficiaries must be set up with your particular retirement vendor. (i.e. TIAA-CREF)

### Procedure



Step	Action
1.	Click the <b>Employee Self Service</b> link. 



Step	Action
2.	Click the <b>Benefits</b> link. 
3.	Click the <b>Benefits Summary</b> link. 
4.	The Summary page displays your coverage level and participation in each benefit to which you are eligible.  The date is today's date by default. To view coverage for a different date, enter a new date in the <b>Date</b> field and click <b>Go</b> .

# Business Process Document

## Benefits Administration: Beneficiary Designations



MaineStreet

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**Menu**

Search: [ ]

- My Favorites
- Self Service
  - Time Reporting
  - Personal Information
  - Payroll and Compensation
- Benefits
  - Benefits Summary**
    - Dependent/Beneficiary Info
    - Dependent/Beneficiary Coverage
    - Leave Balance
    - Insurance Summary
    - Benefits Enrollment
  - University of Maine System Reporting Tools
  - People Tools
  - Return to Portal
  - My Personalizations
  - My Dictionary

**Benefits Summary**

New Hire Test

To view your benefits as of another date, enter the date and click Go:

08/03/2009 [ ]

Type of Benefit	Plan Description	Coverage or Participation
<a href="#">Medical</a>	Anthem HMO Choice POS NonRep	Employee + 1 Depende
<a href="#">Dental</a>	CIGNA Dental Plan	Employee Only
<a href="#">Vision</a>		Waived
<a href="#">Domestic Partner Medical</a>		Waived
<a href="#">Life</a>	Basic Life 1X Under 65	1 X Salary
<a href="#">Supplemental Life</a>	Optional 2X	2 X Salary
<a href="#">AD and D</a>	Basic Accidental Death & Dis.	1 X Salary
<a href="#">Domestic Partner Life</a>		Waived
<a href="#">Supplemental AD and D</a>	Family Coverage	\$100,000
<a href="#">Child Life</a>	Dependent Child Life Ins - 10K	\$10,000
<a href="#">Spouse Life</a>		Waived
<a href="#">Short-Term Disability</a>		Waived
<a href="#">Long-Term Disability</a>	Long Term Disability	60% of Salary
<a href="#">403(b)</a>	Hourly Retirement Pre-Tax	4% Before Tax
<a href="#">Sick</a>	Disability Leave FT Classified	.....
<a href="#">Vacation</a>	Annual Leave FT Classified	.....
<a href="#">Flex Spending Health - U.S.</a>	FSA Health Care	\$2,100 Pledge
<a href="#">Flex Spending Dependent Care</a>		Waived

Go to:


Step	Action
5.	<p>Beneficiaries must be designated separately for each of the following plans, even if you want them all to be the same:</p> <ul style="list-style-type: none"> <li>-<b>Life</b></li> <li>-<b>Supplemental Life</b></li> <li>-<b>AD and D</b></li> <li>-<b>Supplemental AD and D</b></li> </ul> <p>For this example, click <b>Life</b> in the <b>Type of Benefit</b> column.</p> <p><a href="#">Life</a></p>



# Business Process Document

## Benefits Administration: Beneficiary Designations

The screenshot shows the 'Life' page in the MaineStreet system. The page includes a navigation menu on the left, a search bar, and a 'New Hire Test' section with a date input field (08/03/2009) and a 'Go' button. Below this, the 'Life' section displays plan details: Plan Name (Basic Life 1X Under 65), Plan Provider (Prudential Insurance Company of America), Coverage Level (1 X Salary), and Group Number. A 'Customer Service' section with an 'Ext:' label is also present. The 'Covered Beneficiaries' section contains a table with columns for Name, Relationship, Primary Allocation, and Contingent Allocation. The table lists 'Test Spouse' (Spouse, 100% Primary, 100% Contingent) and 'Test Daughter' (Daughter, 100% Primary, 0% Contingent). An 'Edit' button is located below the table. A link 'Return to Employee Benefit Summary' is at the bottom.

Step	Action
6.	<p>The <b>Life</b> page summarizes the current plan in which you are enrolled.</p> <p>In the <b>Covered Beneficiaries</b> grid, the system will display current beneficiary designations. Blank information indicates no designations are currently assigned.</p> <p>Click the <b>Edit</b> button to change the allocation if desired.</p> <p style="text-align: center;"></p>



**Change Current Beneficiaries and Allocations**

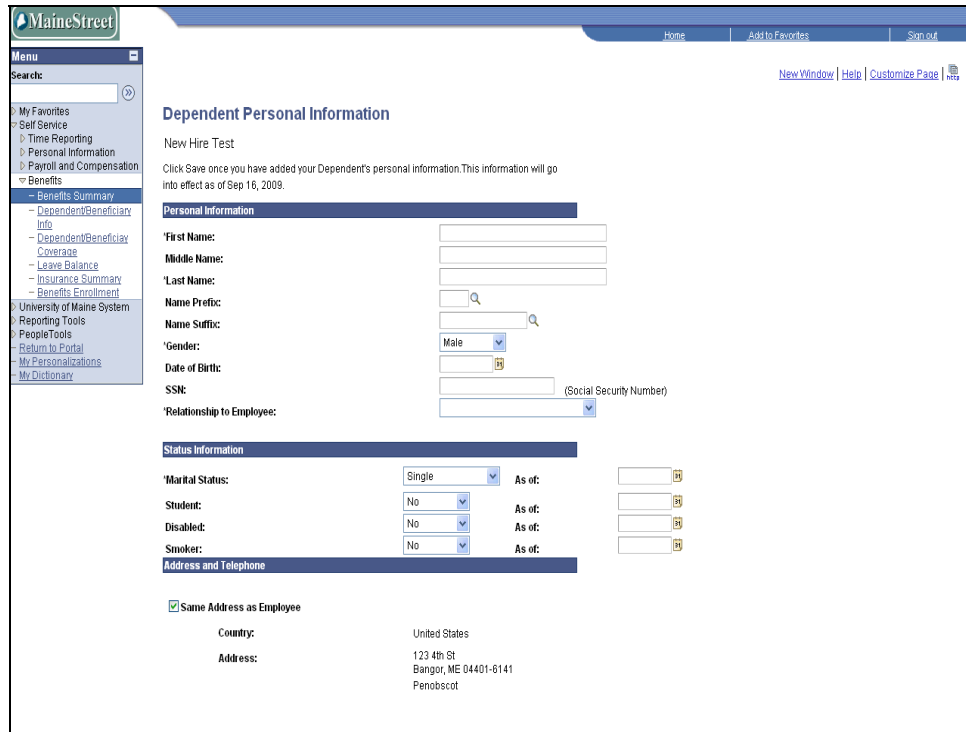
New Hire Test  
 You may designate Primary or Contingent beneficiaries by allocating a percent. Contingent beneficiaries receive benefits only if all Primary beneficiaries are deceased. All percents for Primary beneficiaries must total 100. All percents for Contingent beneficiaries (if any) must also total 100.




Name	Relationship	Current Primary Percent	Current Contingent Percent	New Primary Allocation	New Contingent Allocation
Spouse Test	Spouse	100			
Daughter Test	Daughter		100		
Friend Test	Friend				
<b>Update Totals</b>				0	0

[Add a New Beneficiary](#)

[Return to Life Insurance Main 2x](#)

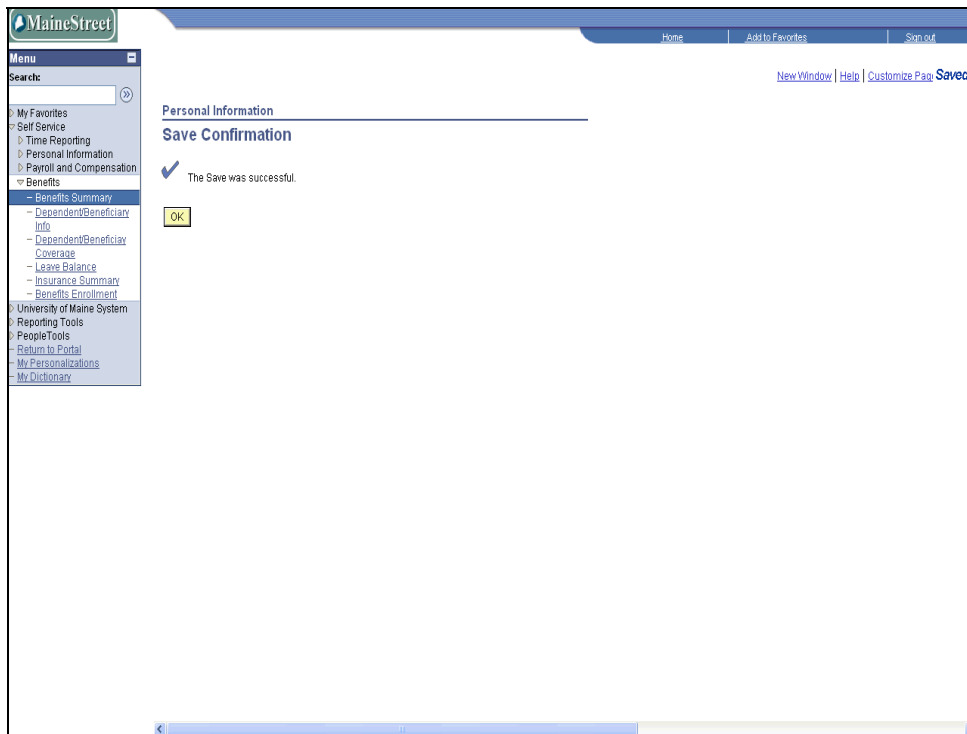
Step	Action
7.	<p>Use the <b>Change Current Beneficiaries and Allocations</b> page to add new beneficiaries and modify the primary and contingent allocation percents.</p> <p>In the grid, the system will display eligible beneficiaries currently in MaineStreet as well as any current designations. Click <b>Add/Review Beneficiaries</b> to add a new beneficiary. Blank percents in the Current Primary/Contingent columns indicate no designations are currently assigned.</p> <p>Click the <b>Add a New Beneficiary</b> link to add a new beneficiary to the list.</p> <p><a href="#">Add a New Beneficiary</a></p>




Step	Action
8.	Enter the desired information into the <b>First Name</b> field.
9.	Enter the desired information into the <b>Last Name</b> field.
10.	Click the <b>Female</b> list item. 
11.	Enter the desired information into the <b>Date of Birth</b> field.
12.	Enter the desired information into the <b>SSN</b> field.
13.	Click the <b>Mother</b> list item. 
14.	Uncheck the box <b>Same Address as Employee</b> to enter a different address.  When satisfied with all of the information entered, click the <b>Save</b> button. 

# Business Process Document

## Benefits Administration: Beneficiary Designations



Step	Action
15.	Click the <b>OK</b> button. 



# Business Process Document

## Benefits Administration: Beneficiary Designations

The screenshot displays the MaineStreet web application interface. On the left is a navigation menu with categories like 'My Favorites', 'Self Service', 'Time Reporting', 'Personal Information', 'Payroll and Compensation', and 'Benefits'. The 'Benefits' section is expanded, showing options like 'Benefits Summary', 'Dependent/Beneficiary Info', 'Dependent/Beneficiary Coverage', 'Leave Balance', 'Insurance Summary', and 'Benefits Enrollment'. The main content area shows a form for 'Personal Information' with fields for First Name (Mother), Middle Name, Last Name (May), Name Prefix, Name Suffix, Gender (Female), Date of Birth (11/30/1951), SSN (123-44-5566), and Relationship to Employee (Mother). Below this is a 'Status Information' section with fields for Marital Status (Single), Student (No), Disabled (No), and Smoker (No). The 'Address and Telephone' section has a checked box for 'Same Address as Employee' and shows the address: 123 4th St, Bangor, ME 04401-6141, Penobscot. There is also an unchecked box for 'Same Phone as Employee' and a 'Phone:' field. A link at the bottom reads 'Return to Change Current Beneficiaries and Allocations'.

Step	Action
16.	<p>If a change needs to be made to your dependent or beneficiary's personal information, notify your <a href="#">Campus Human Resources Office</a> immediately.</p> <p>Click the <b>Return to Change Current Beneficiaries and Allocations</b> link.</p> <p><a href="#">Return to Change Current Beneficiaries and Allocations</a></p>



**Change Current Beneficiaries and Allocations**

New Hire Test  
 You may designate Primary or Contingent beneficiaries by allocating a percent. Contingent beneficiaries receive benefits only if all Primary beneficiaries are deceased. All percents for Primary beneficiaries must total 100. All percents for Contingent beneficiaries (if any) must also total 100.

Name	Relationship	Current Primary Percent	Current Contingent Percent	New Primary Allocation	New Contingent Allocation
Spouse Test	Spouse	100			
Daughter Test	Daughter		100		
Friend Test	Friend				
Mother May	Mother				
<b>Update Totals</b>				0	0

[Add a New Beneficiary](#)

[Return to Life Insurance Main 2x](#)

Step	Action
17.	Enter the desired information into the <b>New Primary Allocation</b> field.
18.	Enter the desired information into the <b>New Contingent Allocation</b> field.
19.	Enter the desired information into the <b>New Contingent Allocation</b> field.
20.	When satisfied with the allocations designated, click the <b>Update Totals</b> button. <input type="button" value="Update Totals"/>
21.	Click the <b>Save</b> button to store changes. <input type="button" value="Save"/>
22.	Click the <b>Return to Life Insurance Main 2x</b> link. <a href="#">Return to Life Insurance Main 2x</a>



**MaineStreet**

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New Window | Help | Customize Page | Help

**Menu**

Search

- My Favorites
- Self Service
- Time Reporting
- Personal Information
- Payroll and Compensation
- Benefits
  - Benefits Summary
  - Dependent/Beneficiary Info
  - Dependent/Beneficiary Coverage
  - Leave Balance
  - Insurance Summary
  - Benefits Enrollment
- University of Maine System
- Reporting Tools
- People Tools
- Return to Portal
- My Personalizations
- My Dictionary

**Life**

New Hire Test

To view your benefits as of another date, enter the date and click Go:

09/16/2009

**Life**

**Plan Name:** Basic Life 1X Under 65

**Plan Provider:** Prudential Insurance Company of America

**Coverage Level:** 1 X Salary

**Group Number:**

**Customer Service:** Ext:

**Covered Beneficiaries**

Click Edit to change your current beneficiary allocations. Click the beneficiary's name to edit the individual's personal information.

Name	Relationship	Primary Allocation	Secondary Allocation
<a href="#">Test Spouse</a>	Spouse	100%	
<a href="#">Test Daughter</a>	Daughter		50%
<a href="#">Max Mother</a>	Mother		50%

[Return to Employee Benefit Summary](#)

Step	Action
23.	Click the <b>Return to Employee Benefit Summary</b> link. <a href="#">Return to Employee Benefit Summary</a>
24.	<b>Remember:</b> Beneficiaries must be designated separately for each of the following plans, even if you want them all to be the same: <ul style="list-style-type: none"> <li>-Life</li> <li>-Supplemental Life</li> <li>-AD and D</li> <li>-Supplemental AD and D</li> </ul> <b>End of Procedure.</b>