

ADDING & UPDATING BENEFICIARIES JOB AID

All employees will complete these steps to add and/or update beneficiaries in STARS Employee Self Service for their basic Life Insurance and Optional Life Insurance plans. Employees are not to delete or modify beneficiaries. *Please note the following for Spring 2020 IFAS to STARS conversion - although your beneficiaries did not transfer over from IFAS they are still valid. You do not have to enter information in STARS unless you want to update your current beneficiary information.*

Login to STARS using your **Employee ID** and **password**.

Step	Action																								
1.	<p>Click on the Benefit Details tile.</p>																								
2.	<p>The Benefits Summary landing page will display. This page lists all your benefits, and this is where you update your beneficiaries. Please Note: It shows benefits as of a certain date. <i>You may change this date and click refresh to apply the new date if there are updates to your benefits as of a certain date.</i></p> <p>To update beneficiaries, click on the type of benefit you want to update (only Life and Optional Life)</p> <p>Benefits Summary</p> <div style="border: 1px solid green; padding: 5px; margin-bottom: 10px;"> <p>As Of: <input type="text" value="03/24/2020"/> <input type="button" value="Refresh"/></p> </div> <table border="1"> <thead> <tr> <th>Type of Benefit</th> <th>Plan Description</th> <th>Coverage or Participation</th> </tr> </thead> <tbody> <tr> <td>Medical</td> <td>Plus Hamp Before Tax</td> <td>Self + 2 or More Dep ></td> </tr> <tr> <td>Dental</td> <td>PPO Before Tax</td> <td>Self + 2 or More Dep ></td> </tr> <tr> <td>Vision</td> <td>Vision Before-Tax</td> <td>Self + 2 or More Dep ></td> </tr> <tr> <td>Life</td> <td>Basic Life</td> <td>\$30000 ></td> </tr> <tr style="border: 2px solid red;"> <td>Optional Life</td> <td>Optional Life 2X Before-Tax</td> <td>Salary X 2 ></td> </tr> <tr> <td>AD and D</td> <td>Accidental Death</td> <td>\$5000 ></td> </tr> <tr> <td>Basic LTD</td> <td>Basic LTD</td> <td>\$120000 ></td> </tr> </tbody> </table>	Type of Benefit	Plan Description	Coverage or Participation	Medical	Plus Hamp Before Tax	Self + 2 or More Dep >	Dental	PPO Before Tax	Self + 2 or More Dep >	Vision	Vision Before-Tax	Self + 2 or More Dep >	Life	Basic Life	\$30000 >	Optional Life	Optional Life 2X Before-Tax	Salary X 2 >	AD and D	Accidental Death	\$5000 >	Basic LTD	Basic LTD	\$120000 >
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3. That specific **Benefit Summary** page will appear. There will be an **Edit** button to update beneficiaries at the bottom of the page. Click the **Edit** button to make changes.

Optional Life

Perfect Employee
To view your benefits as of another date, enter the date and select Go.

03/24/2020

Optional Life

Plan Name Optional Life 2X Before-Tax
Plan Provider HARRIS COUNTY
Coverage Level Salary X 2
Group Number

Covered Beneficiaries

You do not have any beneficiaries as of the date shown on this page. Select Edit if you would like to change or add beneficiaries

4. Click **Add a New Beneficiary**, if you do not have beneficiaries listed or you want to add a beneficiary that is not already listed. *If you do not need to add a beneficiary, skip and proceed to step 6.*

Allocation Details

	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	Makayla	Child		50	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Kayden	Child		50	<input type="text"/>	<input type="text"/>

0 0

5. The **Add a New Beneficiary** Page will appear. Complete all fields and click **Save** for the new beneficiary.

Personal Information

*First Name
Middle Name
*Last Name
Name Prefix
Name Suffix
Date of Birth
*Gender
Social Security Number
*Relationship to Employee

Status Information

*Marital Status Single As of
*Student No As of
*Disabled No As of
*Smoker Non Smoker As of

Address and Telephone

Same Address as Employee
Country United States
Address

Same Phone as Employee
Phone

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<p>6.</p>	<p>Now select the Allocation. You may select between Percent or Flat Amount for the <i>Primary</i> and <i>Secondary</i> Allocations. If you select Percent you will enter percent rates for allocation, if you select Flat Amount you will enter specific dollar amounts for allocation.</p> <hr/> <p>Change Current Beneficiaries and Allocations</p> <p>Life Basic Life</p> <p>Angela</p> <p>To change the allocations for your current beneficiaries, choose an Allocation type. An individual can not be both a primary and a secondary beneficiary. Enter an amount or percent.</p> <p>To add a new beneficiary, use the Add a New Beneficiary button.</p> <p>Allocation Type</p> <p>Enter Primary Allocations as <input type="text" value="Percent"/></p> <p>Enter Secondary Allocations as <input type="text" value="Flat Amount"/></p> <p><i>Allocations Notes:</i> <i>The primary beneficiary/beneficiaries should be who you want to receive your benefits upon your death. If you list more than one primary beneficiary, the life insurance amount will be split as you have allocated by either percent or flat amount.</i> <i>You do not have to list secondary beneficiaries, but if you do and your primary beneficiary/beneficiaries predecease you, the secondary beneficiaries would then receive your life insurance benefit. Again, everyone listed as secondary would split the life insurance proceeds at the percentages or flat dollar amounts you specify.</i></p>																					
<p>7.</p>	<p>Enter the allotment in the Primary and Secondary text box fields based on the percent or flat amount selected. Be sure the total for both primary and secondary (if desired) equal 100% or the total dollar amount of the benefit. Also, be sure to select the allocation boxes at the beginning of each row for the beneficiaries you'd like to receive a primary and secondary allocation.</p> <p><i>This example is using Percent:</i></p> <p>Allocation Details</p> <table border="1" data-bbox="261 1486 1474 1692"> <thead> <tr> <th></th> <th>Name</th> <th>Relationship</th> <th>Current Primary Percent</th> <th>Current Secondary Percent</th> <th>New Primary Allocation</th> <th>New Secondary Allocation</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Makayla</td> <td>Child</td> <td></td> <td></td> <td><input type="text"/></td> <td><input type="text" value="100"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Kayden</td> <td>Child</td> <td></td> <td></td> <td><input type="text" value="50"/></td> <td><input type="text"/></td> </tr> </tbody> </table>		Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation	<input checked="" type="checkbox"/>	Makayla	Child			<input type="text"/>	<input type="text" value="100"/>	<input checked="" type="checkbox"/>	Kayden	Child			<input type="text" value="50"/>	<input type="text"/>
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<p>8.</p>	<p>Click Save once complete.</p> <p><input type="button" value="Save"/></p>																					

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9.	<p>Once saved the confirmed amounts will be displayed to the left of the allocation text box fields. You'll also see them on the benefit summary page.</p> <table border="1" data-bbox="261 420 1230 701"> <thead> <tr> <th>Current Primary Percent</th> <th>Current Secondary Percent</th> <th>New Primary Allocation</th> <th>New Secondary Allocation</th> </tr> </thead> <tbody> <tr> <td></td> <td>50</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td></td> <td>50</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>100</td> <td></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation		50	<input type="text"/>	<input type="text"/>		50	<input type="text"/>	<input type="text"/>	100		<input type="text"/>	<input type="text"/>
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10.	<p>Once this has been updated and confirmed, click the Benefit Summary navigation option on the left to be returned to the Benefit Summary page.</p> <table border="1" data-bbox="261 772 695 1184"> <tr> <td> Benefit Summary</td> </tr> <tr> <td> Life Events</td> </tr> <tr> <td> Dependent/Beneficiary Info</td> </tr> <tr> <td> Benefits Enrollment</td> </tr> <tr> <td> Affordable Care Act ▼</td> </tr> </table>	 Benefit Summary	 Life Events	 Dependent/Beneficiary Info	 Benefits Enrollment	 Affordable Care Act ▼											
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11.	<p>If you need to update beneficiaries for other benefits – <i>remember you may only update Life and Optional Life</i>, repeat steps 2-7 for the other benefit.</p>																
12.	<p>You have updated your beneficiaries in the STARS/PeopleSoft system.</p>																