


BENEFIT CHANGES



Employee Self Service – Updating Life Insurance
Beneficiaries

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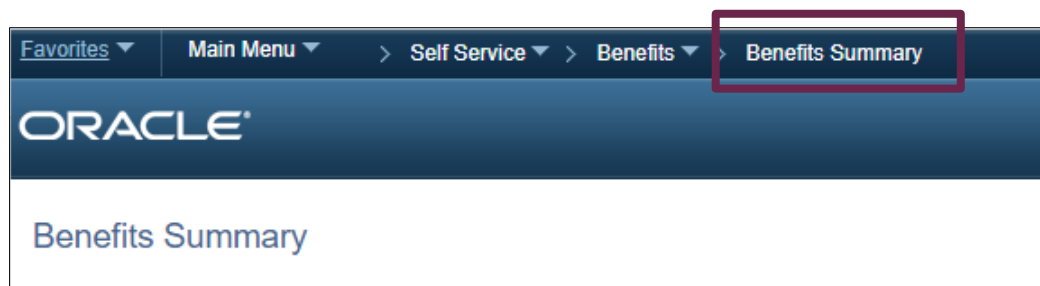
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- ← Log into the Agora Portal
 - <https://portal.bc.edu>
- Find the Human Resources box and click 'PeopleSoft Human Resource Services' →



EMPLOYEE SELF SERVICE NAVIGATION – BENEFITS SUMMARY

- Navigate to Benefits Summary
 - Self Service > Benefits > Benefits Summary



- Click the type of life insurance that you wish to change the beneficiary for, either Basic Life or Supplemental Life.

The screenshot shows the Oracle Benefits Summary page. At the top, there is a date selector set to 11/05/2019 and a 'Go' button. A 'Confirmation Statement' button is also visible. Below this is a table titled 'Benefits Summary' with the following data:

Type of Benefit	Plan Description	Coverage or Participation
Medical	Harvard Pilgrim HMO	Individual
Dental	Delta Premier Plan	Individual
Vision		Waived
Basic Life	Basic Life under 55 (2xsal)	Salary X 2
Supplemental Life		Waived
Dependents Life		Waived
Long-Term Disability	Long-Term Disability Insurance	65% of Salary
ROTH403b	Roth 403b Retirement Plan	11% After Tax
Sick	Sick Leave Accrual Plan	
Vacation	Vacation BC by Hour	
Personal	Personal Leave 35 Hrs	
Vacation Bonus Time (BC)	Vacation Bonus BC 35 Hours	
Flex Spending Healthcare	Medical/Dental Spending Acct	\$500 Pledge
Flex Spending Dependent Care		Waived

BENEFITS SUMMARY – ADDING BENEFICIARIES

- Click the “Edit” button.
- Click “Add a New Beneficiary” to add a beneficiary not listed.

Basic Life

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

11/05/2019

Basic Life

Plan Name Basic Life under 55 (2xsal)
Plan Provider The Standard
Coverage Level Salary X 2
Group Number

Covered Beneficiaries

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

Dep/Ben Coverage Details

Name	Relationship to Employee	Primary Allocation	Contingent Allocation
Smith, John	Spouse	100%	

[Return to Employee Benefit Summary](#)

Change Current Beneficiaries and Allocations

Basic Life **Basic Life under 55 (2xsal)**

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.

To add a new beneficiary, use the Add a New Beneficiary button.

Allocation Type

Enter Primary Allocations as

Enter Secondary Allocations as

Allocation Details

	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	Smith, John	Spouse	100		<input type="text"/>	<input type="text"/>

0 0

[Return to Life Insurance Main](#)

BENEFITS SUMMARY – ADDING BENEFICIARIES

- Complete the required fields for an individual.

If you are adding a **Trust/Estate**

- Complete the following sections:
 - First Name: name of trust/estate
 - Last Name: date established
 - Gender: “Unknown”
 - Relationship to Employee: “Estate”
- Select the “Save” button at the bottom of the screen.
- Go back to the life insurance screen in the Benefits Summary.

Dependent/Beneficiary Personal Information

Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Apr 20, 2020.

If the Dependent/Beneficiary's address is different from your own, deselect the "Same Address as Employee" checkbox and click "Edit Address" button to update.

The "As Of" dates in the Status Information section can be either the date of the event (e.g. date of birth, marriage, etc) or your Date of Hire, whichever is most recent.

Personal Information

*First Name	<input type="text" value="The Smith Family Trust"/>
Middle Name	<input type="text"/>
*Last Name	<input type="text" value="Est. 1/1/2020"/>
Name Prefix	<input type="text"/> 
Name Suffix	<input type="text"/> 
Date of Birth	<input type="text"/> 
*Gender	<input type="text" value="Unknown"/> ▼
Social Security Number	<input type="text"/>
*Relationship to Employee	<input type="text" value="Estate"/> ▼

LIFE INSURANCE – CHANGING ALLOCATIONS

Change Current Beneficiaries and Allocations

Basic Life **Basic Life under 55 (2xsal)**

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.

To add a new beneficiary, use the Add a New Beneficiary button.

Allocation Type

Enter Primary Allocations as

Enter Secondary Allocations as

Allocation Details

	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	Smith, John	Spouse	100		<input type="text"/>	<input type="text"/>

 0 0

[Return to Life Insurance Main](#)

- Update the New Primary Allocation box with the new allocation percent for each beneficiary. This must total 100%.
- Update the New Secondary Allocation box with the new allocation percent for each beneficiary if you wish to have a contingent beneficiary. This must total 100%.
- Once complete click the “Save” button to save your new beneficiary allocations.