

## Steps to Life Beneficiary changes and 403(b) changes:

### Benefits Home Page

To enter your benefit elections click [Benefits](#) under Employee Self Service. The Benefits page opens with options for [Benefits Summary](#), [Family Status Changes](#) and [Benefits Enrollment](#).

### Here is what you'll see:



The screenshot displays the Emory Self Service portal. On the left is a 'Menu' sidebar with a search bar and a list of navigation options including 'My Favorites', 'Emory HRWeb', 'Emory Test Tracker', 'Self Service', 'Manager Self Service', 'Workforce Administration', 'Benefits', 'Payroll for North America', 'Set Up HRMS', 'Reporting Tools', and 'PeopleTools'. The 'Self Service' menu is expanded, showing sub-options like 'Personal Information', 'Payroll and Compensation', 'Benefits', 'Learning and Development', and 'Emory Community Giving'. The main content area is titled 'Self Service' and contains several informational tiles: 'Emory Community Giving', 'Personal Information', 'Payroll and Compensation', 'Benefits', and 'Learning and Development'. The 'Benefits' tile is highlighted with a red box and a red arrow pointing to the 'Benefits Summary' link. A red callout box on the right contains the text: 'Click on the underlined headings to select a process.'

- [Benefits Summary](#) displays your current enrollment in the benefit plans, covered dependents and beneficiary data previously elected within self service. You may update beneficiary data for your life plans under this link. If you haven't elected beneficiaries within self service, then we are maintaining them on your last paper form. You may also change 403b contribution percents here, although you cannot enter brand new elections or vendors. New elections and/or vendors require additional applications. You are directed to the Benefits web site for directions on completing those applications. 457b plans are also excluded from online entry. Please see the web site for information on changing 457b plans.
- The [Family Status Changes](#) link allows you to record events such as marriage, divorce, newborns, adoptions, changes in your spouse or dependent's employment status, or overage children who no longer qualify as dependents.
- [Benefit Enrollment](#) takes you directly into the enrollment panels for open events. Job related events like new hire or open enrollment are opened by Human Resources. After Family Status Change has been created, you may regain access through Benefits Enrollment. This is also where you access Annual Enrollment each fall.

By clicking **Benefits Summary**, this is what you will see and will bring up a summary of your benefits. The life plans that you have are listed with the coverage amounts:

**Menu**

Search:

- ▶ My Favorites
- ▶ Emory HRWeb
- ▶ Emory Test Tracker
- ▼ Self Service
  - ▶ Personal Information
  - ▶ Payroll and Compensation
  - ▼ Benefits
    - [Education Benefit Program](#)
    - [Family Status Change](#)
    - **[Benefits Summary](#)**
    - [Benefits Enrollment](#)
  - ▶ Learning and Development
    - [Emory Community Giving](#)
  - ▶ Manager Self Service
  - ▶ Workforce Administration
  - ▶ Benefits
  - ▶ Payroll for North America
  - ▶ Set Up HRMS
  - ▶ Reporting Tools
  - ▶ PeopleTools

06/20/2007

[Guide to Life Beneficiary and 403\(b\) Changes](#)

Type of Benefit	Plan Description	Coverage or Participation
<a href="#">Medical</a>	BCBSGA PPO (HealthChoice)	Employee Only
<a href="#">Dental</a>	Aetna PPO (Traditional)	Employee Only
<a href="#">Life</a>	Basic Life, Fulltime	\$10,000
<a href="#">Supplemental Life</a>	Supplemental Life Employee	\$130,000
<a href="#">Personal Accident Insurance</a>	PAI Employee	\$250,000
<a href="#">Spouse Personal Accident Ins.</a>	PAI Spouse	\$250,000
	Spouse Life	Waived
	Child Life	Waived
<a href="#">Short-Term Disability</a>	STD 30 Day	60% of Salary
<a href="#">Long-Term Disability</a>	LTD w/COLA	60% of Salary
<a href="#">403(b) Basic</a>	Matched 403(b) Basic Vanguard	2% Before Tax
<a href="#">Fidelity</a>	Supplemental 403(b) Fidelity	4% Before Tax
<a href="#">SRA TIAA-CREF</a>	Supplemental 403(b) SRA TIAA	6% Before Tax
<a href="#">ER 403b Basic</a>	Employer Basic Vanguard	6% ER Contribution
<a href="#">ER 403b Match</a>	3% Fidelity Match	Employer Match
<a href="#">Healthcare FSA</a>	Healthcare FSA	\$750 Pledge
	Supplemental Income Protection	Enrolled

Clicking a life plan link opens a box with an edit option to update beneficiary data.

**Life**

May, P. Dial

of another date, enter the date and click Go:

10/10/2006

**Life**

**Plan Name:** Basic Life, Fulltime  
**Plan Provider:** Ing Benefits  
**Coverage Level:** \$10000  
**Group Number:** 61715-6  
**Customer Service:** 1.800.409.9880

**Covered Beneficiaries**

Click Edit to change your current beneficiary allocations or to add a new beneficiary. For beneficiaries already listed, click the beneficiary's name to review the individual's personal information. You may update (Edit) personal information with the exception of Name, Date of Birth, or Social Security Number. Contact the Benefits Department at 781.378.7813 to request changes to those fields.

Name	Relationship	Allocation
<a href="#">Julian Dial Jr.</a>	Spouse	100%

Go To: [Benefits Summa](#)

Primary Beneficiaries are displayed. Click Edit to view Secondary Beneficiaries or to make changes to either allocation.

## Change Current Beneficiaries and Allocations



To change the allocations for your current beneficiaries, enter the new percents in the New Primary and New Secondary Allocation columns. Each column must total to 100%. Percents must be entered in whole numbers without decimals. For example, three primary beneficiaries would have to be divided into 34%, 33% and 33%.

Primary beneficiary(ies) will receive total payment. Secondary beneficiary(ies) will receive payment only if no Primary beneficiary(ies) survives the insured. Beneficiaries in the same class will receive separate shares based upon the percents you designate. If no named beneficiary survives the insured or if the estate of the insured is named as beneficiary, payment will be made in one sum to the estate of the insured.

If you wish to name your estate as beneficiary, please add a new Dependent/Beneficiary record. Enter the First Name as "To the Estate of xxxxxxx" and type your first name instead of xxxxxxx. Enter The Last Name as your Last Name. If your estate is set up with a name that does not follow this naming convention or if you need to list the name of a Trust, you will need to complete a paper Life Insurance form.

The form may be downloaded and printed at the following web site:

[Life Insurance Enrollment Form](#)

### Allocation Type

Enter Primary Allocations as:   Percent

Enter Secondary Allocations as:   Percent

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
	Spouse	100		<input type="text"/>	<input type="text"/>
	Son		34	<input type="text"/>	<input type="text"/>
	Daughter		33	<input type="text"/>	<input type="text"/>
	Daughter		33	<input type="text"/>	<input type="text"/>
<b>Update Totals</b>				0	0

[Add a New Beneficiary](#)

Enter New Allocations here. Primary Allocation must add up to 100% and must be entered as whole numbers without decimals. If you chose to list Secondary Beneficiaries, that allocation also needs to equal 100%.

**Under the Benefit Summary, the Retirement Vendor and Contribution amount you have are listed.**

**Selecting a 403b plan opens the plan detail page, including the edit option for changing the contribution percent.**

## SRA TIAA-CREF



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

### SRA TIAA-CREF

**Plan Name:** Supplemental 403(b) SRA TIAA

**Plan Provider:** TIAA CREF

**Group Number:** HL27/HL26

**Customer Service:** 1.800.842.2733

**Ext:**

#### Current Contributions

Click Edit to change your Supplemental Employee Contribution. The combination of your Basic and Supplemental contributions cannot exceed \$15,000 annually or \$20,000 if you are age 50 or above. If you would like to terminate your contributions or make elections with a new vendor, you will need to submit a new Retirement Authorization Form and enroll with the vendor if applicable. Forms and instructions on how to enroll are on the Human Resources web site under [Retirement Plan](#). If you would like to contribute the IRS maximum amount and would like the Benefits Office to calculate the amount, call (404) 727-7613. Changes take effect immediately.

**Before Tax:** 1%

[Benefits Summary](#)

Click Edit to change your contribution percent. You may only make changes to plans you are currently enrolled in and the system does not allow you to stop contributions on this site. To make new elections or to stop current elections, please click the link to [Retirement Plans](#) to download the appropriate forms.

**Once you've clicked Edit, the following page is displayed:**

## Change Current Savings Plan Contributions



Current 403(b) plan contribution, enter the new percent in the box below. Only employees making below \$90,000.00 will be allowed to contribute on an After Tax basis in the traditional 403(b) plans. **(This does not include the Roth Plans.)** You can not change your contribution more than once a day.

### Current Savings Plan Contributions

**Before Tax:** 1.00

### Enter New Savings Contributions

**Before Tax**

% **Max:** 100.000

[Return](#)

Enter your new percent and hit . The change will be effective with the next payroll run.

**It is important to note that the 403(b) Basic plan is the plan matched by the University once you have satisfied the plan requirements – one year of service, age 21, and 1,000 hours. Before contributing to any Supplemental plans, you should contribute 2% to the Basic plan to receive the maximum matching funds. Do not reduce the 403(b) Basic plan without understanding the consequences to the University match. All plan and vesting requirements apply to employee elections entered online.**