

The purpose of this job aide is to provide a guide to update Life & AD&D and/or Voluntary Life Beneficiary allocation percentage.

Navigation of PeopleSoft

Step 1.

- Open an Internet browser.
- Navigate to [Employee Self-Service](#)

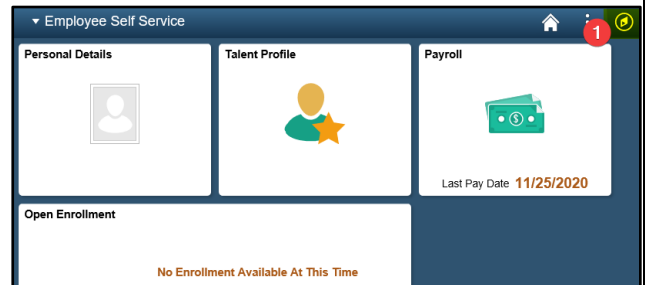
Step 2.

- Enter User ID (Your employee ID with an “E” in front of it)
- Enter Password
- Select Sign In

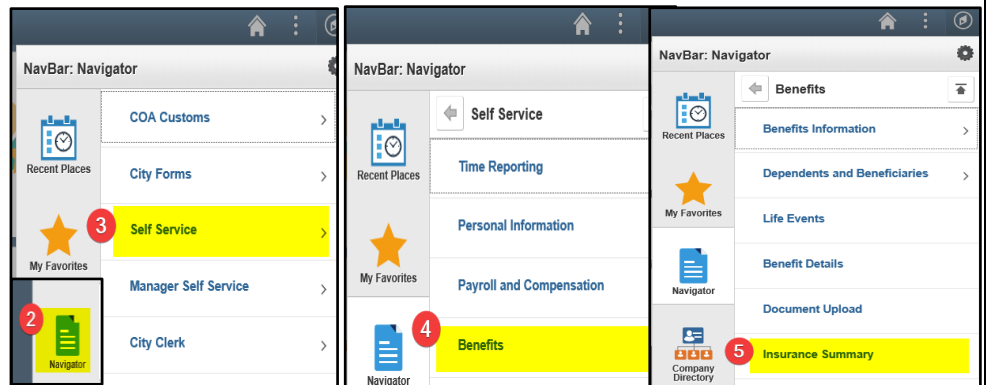


Step 3.

- Select the NavBar at the top right of the home page.



- Select Navigator
- Select Self Service
- Select Benefits
- Select Insurance Summary



Navigation of PeopleSoft

Step 4.

- Select the "Type of Benefit" link to update
- Select Edit

The screenshot shows two side-by-side panels. The left panel, titled "EMPLOYEE Insurance Summary", includes a date selector (12/07/2020) and a "Go" button. Below is a "Benefits Summary" table:

Type of Benefit	Plan Description
Voluntary Life	
Life and AD and D	Basic Life/AD&D Active EE's
Dependent Life	
Spousal Life	

The right panel, titled "EMPLOYEE Life and AD and D", shows plan details: Plan Name (Basic Life/AD&D Active EE's), Plan Provider (MUTUAL OF OMAHA INSURANCE COMPANY), Coverage Level (\$1.4 X Salary), and Group Number. Below is a "Covered Beneficiaries" table:

Name	Relationship to Employee	Primary Allocation
[Redacted]	Parent	50%
[Redacted]	Parent	50%

An "Edit" button is visible at the bottom of the right panel.

Step 5.

- Enter updated allocation **NOTE – A primary allocation totaling 100% is required. A secondary allocation is not required, but is recommended.**

The screenshot shows the "Allocation Details" form. It includes fields for "Allocation Type" (Primary and Secondary) and a table for beneficiary allocations. Red callouts explain allocation types: "Primary Allocation - First to receive the benefit." and "Secondary (or contingent) Allocation - Receives benefit only if the Primary beneficiary is deceased." A red circle with the number "1" points to the "Update Totals" button, and a red circle with the number "2" points to the "Save" button. A blue box shows the total allocation is 100%.

	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	[Redacted]	Parent	50		[Yellow Box]	[Input Field]
<input type="checkbox"/>	[Redacted]	Parent	50		[Input Field]	[Yellow Box]

Buttons: "Add a New Beneficiary", "Update Totals", "Save". Total: 100.

Click Update Totals to ensure your amount is 100%

- Click Save
- When saved you will receive a confirmation.

The screenshot shows a "Save Confirmation" dialog box with a checkmark and the message "The Save was successful." and an "OK" button.