Contents

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Benefits: Managing Life Insurance Beneficiaries

Within USFWorks, you can manage your life insurance Beneficiaries by adding, editing, or removing a Beneficiary, and viewing and editing your Beneficiary elections.
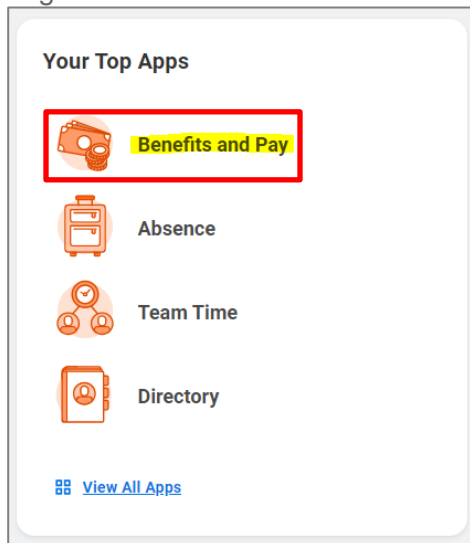
How to add a life insurance Beneficiary

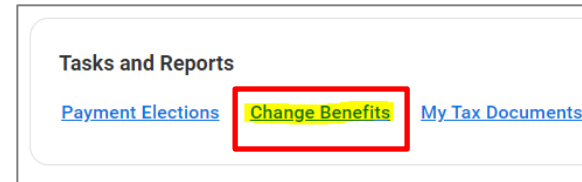If you need to add a Beneficiary, initiate a **Change Benefits** event in USFWorks.

- If you are adding a new Beneficiary, please provide contact details and personal information for the Beneficiary.

- You may edit your existing Beneficiaries within the Beneficiary Change benefit event.
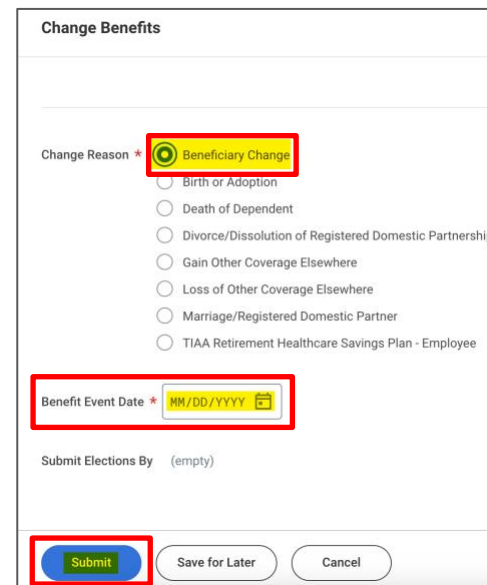
Follow these steps:
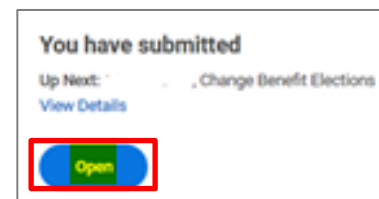
1. Log in to USFWorks and click **Benefits and Pay**.

Your Top Apps

- **Benefits and Pay**
- Absence
- Team Time
- Directory

View All Apps

2. On the next page, under **Tasks and Reports**, select **Change Benefits**.

Tasks and Reports

Payment Elections   Change Benefits   My Tax Documents

3. Select the Change Reason:

   a) Select **Beneficiary Change**.

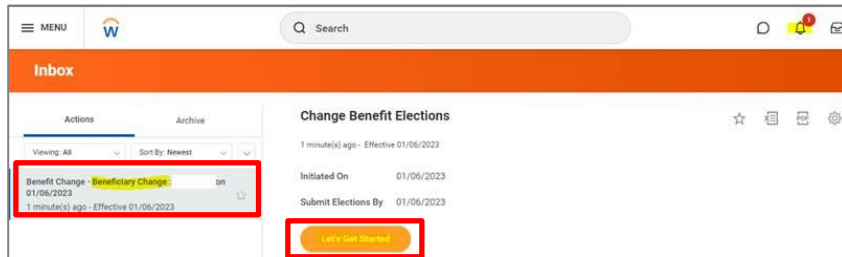   b) Enter today's date for the **Benefit Event Date**.

   c) Click **Submit**.

Change Benefits

Change Reason *
- ◉ Beneficiary Change
- ○ Birth or Adoption
- ○ Death of Dependent
- ○ Divorce/Dissolution of Registered Domestic Partnership
- ○ Gain Other Coverage Elsewhere
- ○ Loss of Other Coverage Elsewhere
- ○ Marriage/Registered Domestic Partner
- ○ TIAA Retirement Healthcare Savings Plan - Employee

Benefit Event Date *   MM/DD/YYYY 📅

Submit Elections By   (empty)

[Submit]   [Save for Later]   [Cancel]

4. A pop-up window will appear stating you have submitted. Click **Open**.

You have submitted

Up Next: , Change Benefit Elections
View Details

[Open]

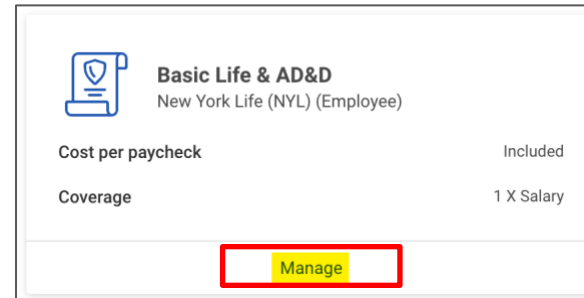UNIVERSITY OF SAN FRANCISCO
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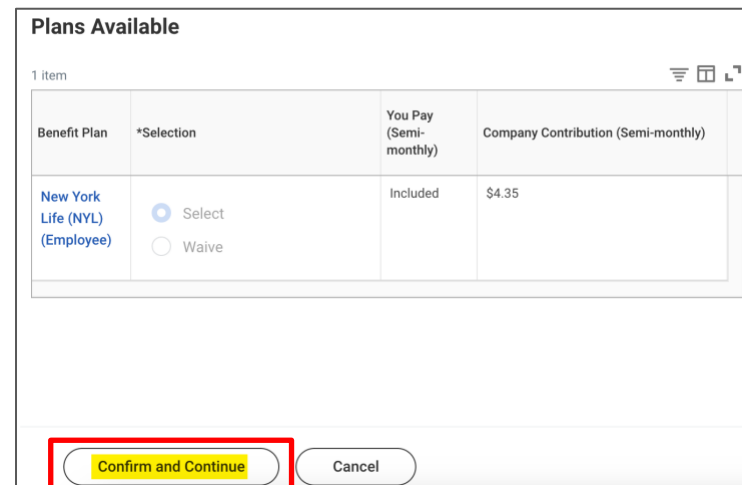**5.** On the next page, click **Let's Get Started**.

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Beneficiary Change** message and then **Let's Get Started**.)

6. On the page with the Benefits options, click **Manage** under the **Basic Life & AD&D** box.

7. Click **Confirm and Continue**.

8. On the next page, click the '**Plus, +**' symbol and then **Add New Beneficiary or Trust**.

Important note:

An existing Beneficiary or Trust can be added by simply selecting the relevant option (Existing Beneficiary Persons / Existing Trusts) and clicking on their name.

9. To add a <u>new</u> Beneficiary select **Add New Beneficiary** or **Add New Trust**, depending on the type of Beneficiary you are adding, and then click **Continue.**

Required Information to enter:

- First and last name

- Relationship

- Address

- Type (Home or Work)

- *We also recommend adding your Beneficiary's phone number, email address, date of birth, legal sex and National ID too (this is their SSN or ITIN, or National ID from country of citizenship if ineligible for an SSN or ITIN).*

- ***Note:*** *Trust Beneficiary designations will require trust name, trustee name [first and last]. Additionally, Trust ID, trust date, and contact information [address, phone number and email address] for Trustee may be provided for ease of administration.*

10. If adding a **New Beneficiary**:

**11.** If adding a **New Trust** as a Beneficiary:

12. Once you have entered the information, click **OK**.

13. Check that your Beneficiary's name now appears and then allocate the **percentage** you would like them to receive.

14. Add additional Beneficiaries by following the previous steps (9-14). Click **Save** when you are done.

If you have more than one Beneficiary, enter Allocations for Primary and/or Secondary Beneficiary.
Percentages MUST total 100%. You may also add additional Beneficiaries to whom you may allocate Secondary Percentage totaling 100%. You may NOT designate the same Beneficiary more than once within a single Benefit plan
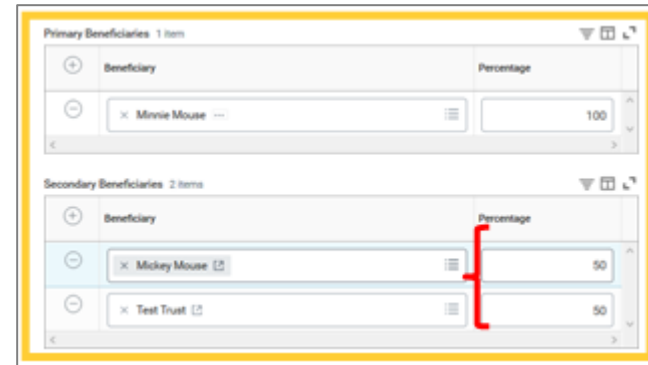
15. You will be taken back to the page with the Benefits options.

If you have elected any of the following voluntary life insurance plans, you must also add at least one Beneficiary to these plans. These plans are:

- Voluntary AD&D – Employee*

- Voluntary AD&D – Family*

- Voluntary Term Life

If you wish to add the same Beneficiary(s) as the one(s) you designated on your *Basic Life & AD&D* plan, an existing Beneficiary or Trust can be added by simply selecting the relevant option (**Existing Beneficiary Persons / Existing Trusts**) and clicking on their name.

* You may only elect **one** Voluntary AD&D Plan (i.e. Employee or Family).

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NOTE: Previous Beneficiaries for your plan(s) will still appear on your USFWorks profile. However, they will not be included on your plan(s) if you have removed them. They can be designated again later by simply selecting the relevant option (**Existing Beneficiary Persons / Existing Trusts**) and clicking on their name.

16. Once you are done adding Beneficiaries, on the page with the click **Review and Sign**.

17. On the next page, review to make sure everything is correct, read the legal notice, check the box next to *I Accept,* and click **Submit**.

18. On the next page, click **Done**.

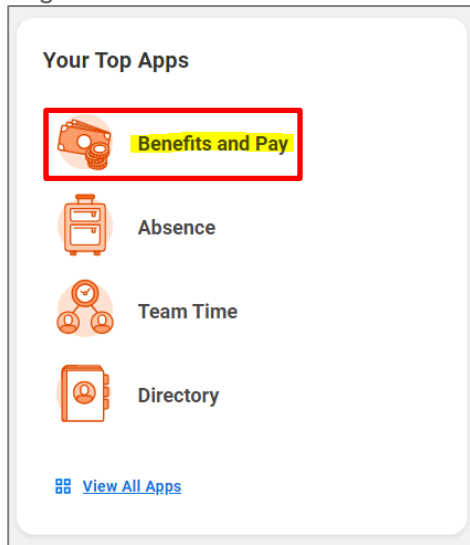19. Your submission will be automatically routed to your HR Benefits partner for processing.

How to remove a life insurance Beneficiary

If you need to remove a Beneficiary, initiate a **Change Benefits** event in USFWorks.
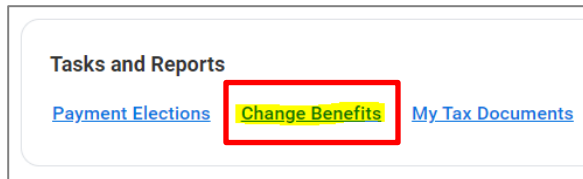
- You may edit your existing Beneficiaries within the Beneficiary Change benefit event.

Follow these steps:
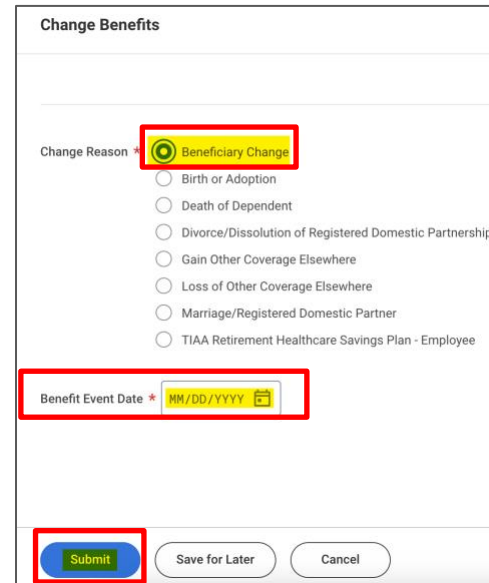
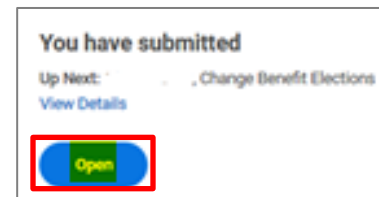1. Log in to USFWorks and click **Benefits and Pay**.

2. On the next page, under **Tasks and Reports**, select **Change Benefits**.

3. Select the Change Reason:
   a) Select **Beneficiary Change**.
   b) Enter today's date for the **Benefit Event Date.**
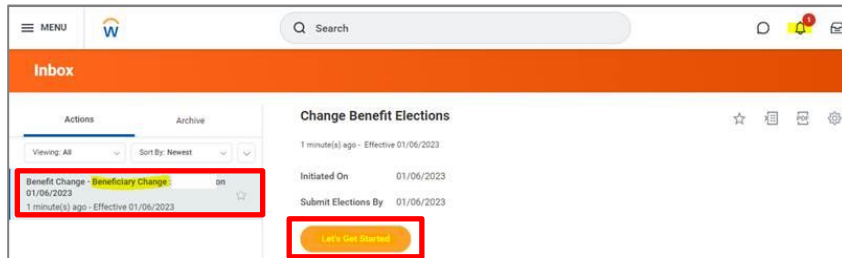   c) Click **Submit**.

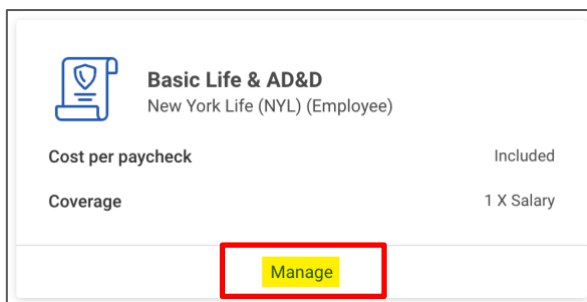4. A pop-up window will appear stating you have submitted. Click **Open**.

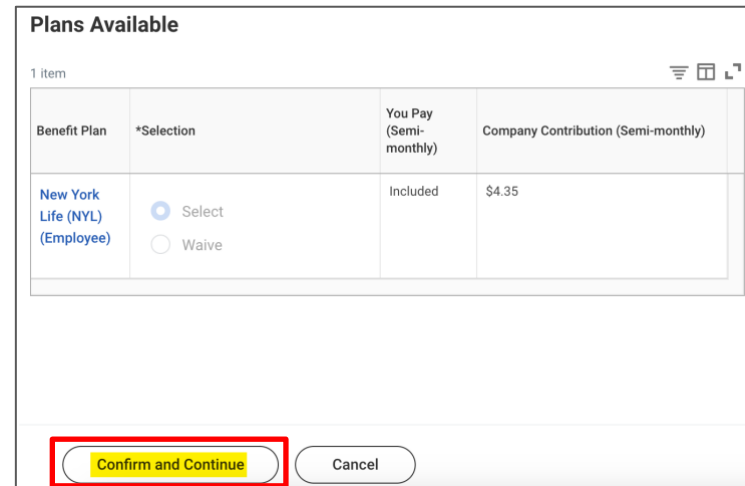**5.** On the next page, click **Let's Get Started**.

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Beneficiary Change** message and then **Let's Get Started**.)
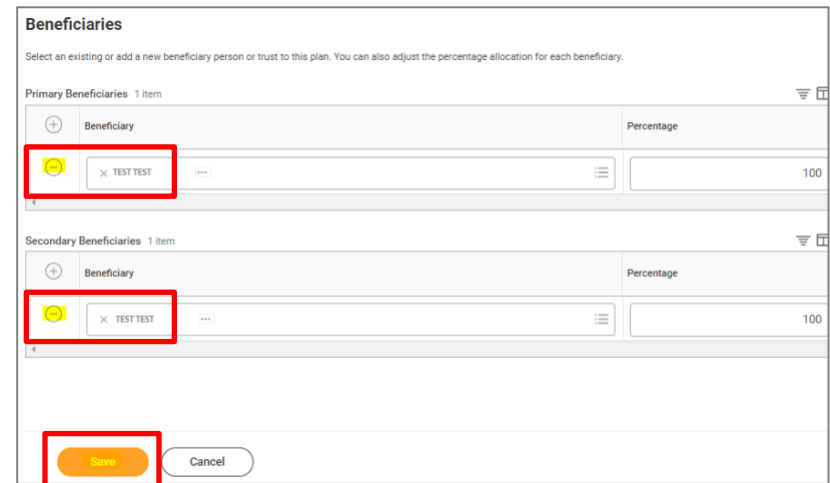

6. On the page with the Benefits options, click **Manage** under the **Basic Life & AD&D** box.

7. Click **Confirm and Continue**.

8. Next, click '**Minus, -**' next to the name(s) of the Beneficiary(ies) you wish to remove and then click **Save**.

Important:

You **must** have at least one designated Beneficiary on your plan. If you remove the only Beneficiary from your plan, you must add a new Beneficiary (see pages 2-8 for the steps on how to do this).

9. You will be taken back to the page with the Benefits options.

If you have elected any of the following voluntary life insurance plans, you are also able to remove a Beneficiary from these plans. These plans are:
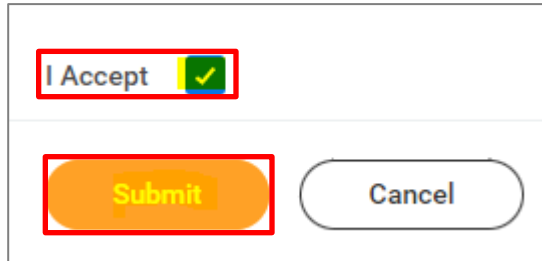
- Voluntary AD&D – Employee*

- Voluntary AD&D – Family*

- Voluntary Term Life

* You may only elect **one** Voluntary AD&D Plan (i.e. Employee or Family).

10. Once you are done removing Beneficiaries, click **Review and Sign**.

11. On the next page, review to make sure everything is correct, read the legal notice, check the box next to *I Accept*, and click **Submit**.

12. On the next page, click **Done**.

13. Your submission will be automatically routed to your HR Benefits partner for processing.

Please note:

If you remove a Beneficiary, they will still appear in your USFWorks profile. However, they will **not** be included on your plan(s) if you have removed them.

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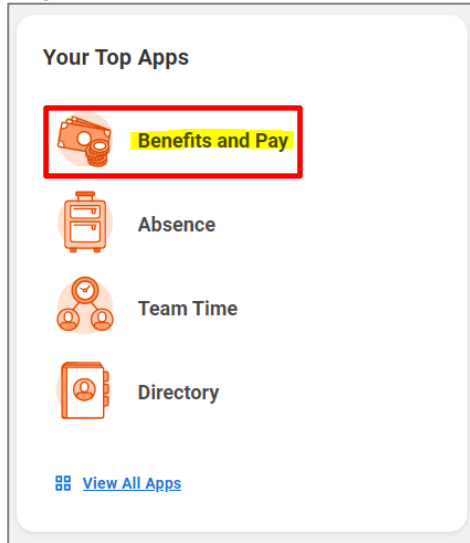USFWorks powered by Workday

How to amend a life insurance Beneficiary percentage allocation

If you need to amend a Beneficiary's allocation percentage, initiate a **Change Benefits** event in USFWorks.
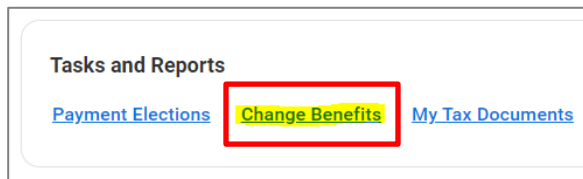
- You may edit your existing Beneficiaries within the Beneficiary Change benefit event.

Follow these steps:
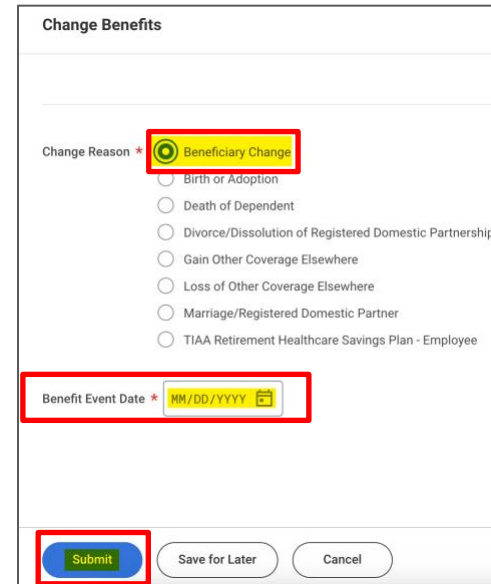
1. Log in to USFWorks and click **Benefits and Pay**.

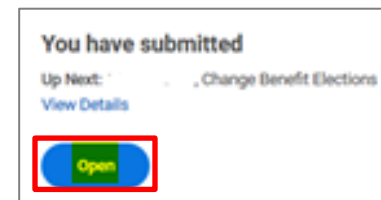2. On the next page, under **Tasks and Reports**, select **Change Benefits**.

3. Select the Change Reason:
   d) Select **Beneficiary Change**.
   e) Enter today's date for the **Benefit Event Date.**
   f) Click **Submit**.

4. A pop-up window will appear stating you have submitted. Click **Open**.

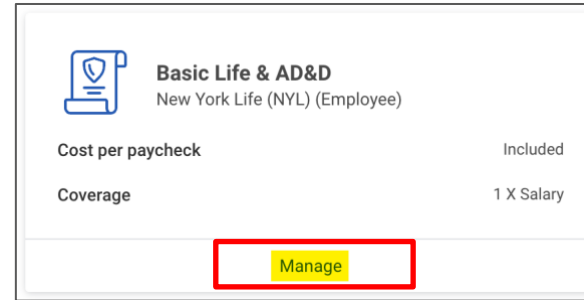5. A pop-up window will appear stating you have submitted. Click **Open**.

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You have submitted

Up Next: . Change Benefit Elections

View Details

Open

6. On the next page, click **Let's Get Started**.

Change Benefit Elections

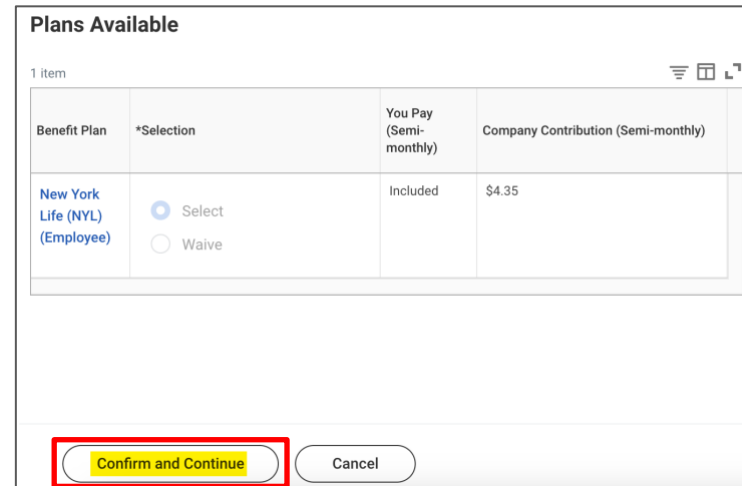| Initiated On | 01/26/2023 |
| Submit Elections By | 10/30/2023 |

Let's Get Started

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click **Beneficiary Change** message and then click **Let's Get Started**.)
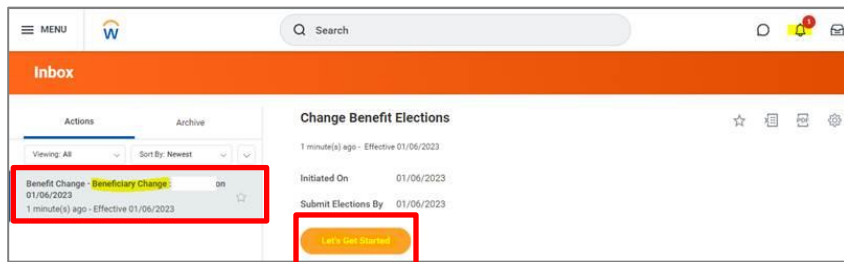
7. On the page with the Benefits options, click **Manage** under the **Basic Life & AD&D** box.

Basic Life & AD&D
New York Life (NYL) (Employee)

| Cost per paycheck | Included |
| Coverage | 1 X Salary |

Manage

8. Click **Confirm and Continue**.

Plans Available

1 item

Benefit Plan	*Selection	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
New York Life (NYL) (Employee)	○ Select ○ Waive	Included	$4.35

Confirm and Continue   Cancel

9. Amend the percentage allocations (they must add up to 100%) and then click **Save**.

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13. On the next page, click **Done**.

14. Your submission will be automatically routed to your HR Benefits partner for processing.

10. You will be taken back to the page with the Benefits options.

If you have elected any of the following voluntary life insurance plans, you are also able amend the percentage allocation(s) on these plans. These plans are:

- Voluntary AD&D – Employee*

- Voluntary AD&D – Family*

- Voluntary Term Life

* You may only elect **one** Voluntary AD&D Plan (i.e. Employee or Family).

11. Once you are done editing percentage allocations, click on **Review and Sign**.

12. On the next page, review to make sure everything is correct, read the legal notice, check the box next to *I Accept,* and click **Submit**.
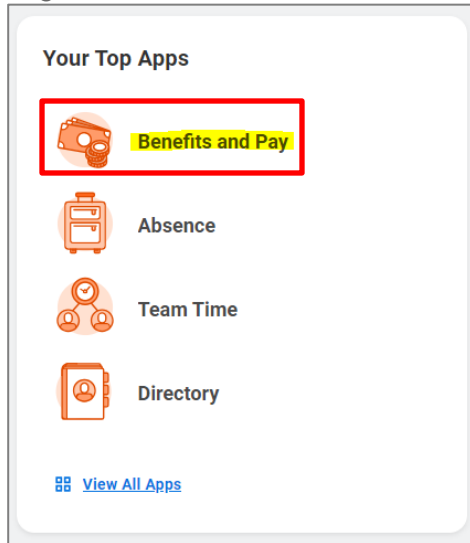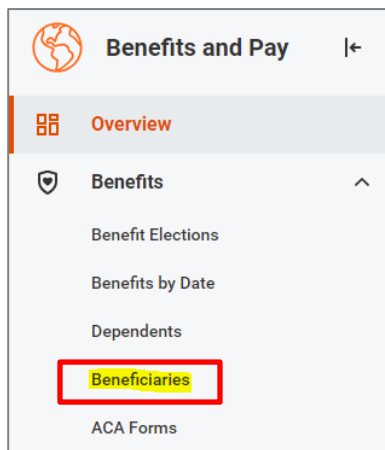
How to view your life insurance Beneficiaries

Follow these steps:

1. Log in to USFWorks and click **Benefits and Pay**.

Your Top Apps

- Benefits and Pay
- Absence
- Team Time
- Directory

View All Apps

2. On the next page, click **Benefits** and then select **Beneficiaries**.

Benefits and Pay

- Overview
- Benefits
  - Benefit Elections
  - Benefits by Date
  - Dependents
  - Beneficiaries
  - ACA Forms

3. On the next page, you will see a **list of Beneficiaries** and the plans they are associated with.

Important:

If the Benefit Elections field is blank, this means that the Beneficiary has not been added to your life insurance plan(s).

Beneficiaries

Add

Beneficiaries 4 items

Beneficiary	Relationship	Benefit Elections	
Beneficiary's name	Beneficiary's relationship to you	Basic Life & AD&D - New York Life (NYL) (Employee): 100% Primary	Edit

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Benefits Team contact information

Please contact a USF Benefits Representative if you have further questions at benefits@usfca.edu or dial (415) 422-2442.

For inquiries concerning:
- a general HR issue, please email humanresources@usfca.edu
- leaves, please email leaves@usfca.edu
- payroll, please email payroll@usfca.edu
- retirement, please email retirementplan@usfca.edu
- Tuition Remission, please email tuitionremission@usfca.edu

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