

## Add or Change Life Insurance Beneficiaries

### IMPORTANT

Please visit the [Benefits](#) web site for comprehensive information about **Basic** life insurance and **Supplemental** life insurance. Click on a staff category from the left-hand navigation menu, then click on life insurance.

You can also contact [Employee Services](#) at 203-432-5552 to learn more.

- Please note: Post Doctoral Associates are not eligible for **Basic** life insurance and Post Doctoral Fellows are not eligible for **Basic** life insurance or **Supplemental** life insurance benefits through Yale University.

1. Open an internet browser and type in the following address to access the portal: [www.yale.edu/portal](http://www.yale.edu/portal).
2. Click **Login to the portal**, and log in using your NetID and password.
3. Click **My Benefits** on the upper right side of the screen.
4. Click **Access** in the **My Health & Insurance** box on the left side of the screen.
5. Click **Your Beneficiaries** in the **Coverage at a Glance** box on the bottom left side of the screen.
6. Click **Beneficiaries**.

Brief life insurance overview (see note at top of page):

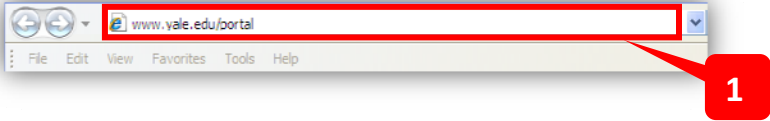
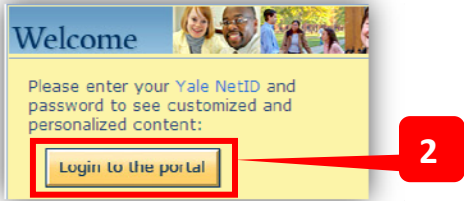

**Basic** life Insurance: Enrollment in Group Term **Basic** life Insurance is automatic and free to the employee.

**Supplemental** life Insurance: Group Term **Supplemental** life Insurance and an equivalent amount of Accidental Death and Dismemberment coverage in multiples of 1, 2, 3, 4 or 5 times base annual salary or a flat amount of \$50,000, to a maximum coverage of \$1,500,000. Monthly cost is based on your age and the coverage amount.

**Beneficiaries:** You may designate different Beneficiaries for the **Basic** and **Supplemental** life insurance policies. A **Beneficiary** receives compensation upon your death. Updates can be made at any time during the year.

7. To update your beneficiary designations, click **Choose Beneficiaries**.
8. To update your designations, use the radio buttons, then click **Continue**. Skip to step 16.
9. To add a beneficiary, click **Add Beneficiary**.
10. Choose the **relationship** of the new beneficiary to you in the drop down list.
11. Complete all required fields (\*), then click **Continue**.
12. Review the information. If corrections are needed, click **Back**, and return to step 12.  
If no corrections are needed, click in the **check box** on the lower left side of the screen, then click **Save**.
13. To update your designations, use the radio buttons, then click **Continue**.
14. Update your designation percentages, then click **Continue**.
15. Review the designation percentages. If corrections are needed, click **Back**, and return to step 16.  
If no corrections are needed, click **Save and Continue**.
16. You will see a confirmation that your **beneficiary designations** were saved successfully.
17. You can log out or close your browser.

ILLUSTRATED INSTRUCTIONS BEGIN ON THE NEXT PAGE

<p><b>1</b> Open an internet browser and type in the following address to access the portal:</p> <p><a href="http://www.yale.edu/portal">www.yale.edu/portal</a></p>	
<p><b>2</b> Click <b>Login to the portal</b>, then log in with your NetID and password.</p>	
<p><b>3</b> Click the <b>My Benefits</b> link on the upper right hand corner of the Portal.</p> <p><b>4</b> Faculty will see a different menu pane.</p>	
<p><b>5</b> Click <b>Access</b> in the <b>My Health &amp; Insurance</b> box.</p>	

**6** Click **Your Beneficiaries**.



**7** Click **Beneficiaries**.



Here is a general overview of Yale’s **Basic** life insurance and **Supplemental** life insurance benefits.

Please refer to the [Benefits](#) web site for comprehensive life insurance information. Click on a staff category from the left-hand navigation menu, then click on life insurance.

**Basic** life Insurance: Enrollment in Group Term **Basic** life Insurance is automatic and free to the employee. Yale University provides all eligible employees and Faculty with **Basic** term life insurance and an equivalent amount of Accidental Death and Dismemberment coverage.

**Supplemental** life Insurance: All eligible employees have the opportunity to purchase Group Term **Supplemental** life Insurance and an equivalent amount of Accidental Death and Dismemberment coverage in multiples of 1, 2, 3, 4 or 5 times their base annual salary or a flat amount of \$50,000, to a maximum coverage of \$1,500,000. Your monthly cost is based on your age and the coverage amount.

**Beneficiaries:** You may designate different Beneficiaries for the **Basic** and **Supplemental** life insurance policies. A **Beneficiary** is a person whom you designate to receive compensation upon your death. You can update Beneficiary information at any time during the year.

**8** To update your beneficiary designations, click **Choose Beneficiaries**.

**Beneficiary Designations**

Please review your beneficiary designations below. To edit your designations or to select a new beneficiary for the coverage shown, click **Choose Beneficiaries**.

Basic Life		
Current Beneficiary Designations	Relationship	Benefit %
<b>Primary</b>		
Anne Monroe	Spouse	100%
<b>Contingent<sup>1</sup></b>		
Wilton Monroe	Child	100%

[Choose Beneficiaries](#)

Supplemental Life		
Current Beneficiary Designations	Relationship	Benefit %
<b>Primary</b>		
Anne Monroe	Spouse	100%
<b>Contingent<sup>1</sup></b>		
Wilton Monroe	Child	100%

[Choose Beneficiaries](#)

<sup>1</sup>Contingent beneficiaries take effect if all your primary beneficiaries die before you.

**What is a Beneficiary?**

A beneficiary is a person whom you designate be compensated upon your death.

You may update beneficiary information at any time during the year.

**9** To update your designations, use the radio buttons, then click **Continue**. Skip to step 16.

**10** To add a beneficiary, click **Add Beneficiary**.

coverage shown, click **Choose Beneficiaries**.

beneficiary information at any time during the year.

A beneficiary is a person whom you designate be compensated upon your death.

You may update beneficiary information at any time during the year.

Choose your beneficiary from the list or add a new beneficiary. Close

Name	Relationship	Beneficiaries		Not a Beneficiary
		Primary	Contingent <sup>1</sup>	
Anne Monroe	Spouse	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wilton Monroe	Child	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

[Add Beneficiary](#)

<sup>1</sup>Contingent beneficiaries take effect only if all your primary beneficiaries die before you.

Continue Cancel

**11** Choose the **relationship** of the new beneficiary to you in the drop down list.

beneficiary information at any time during the year.

To add a person, enter data into the open fields below and click **Continue**.

When the "Address same as employee" checkbox is selected address fields are not editable.

\*Relationship: Choose One

\*Required Field When Available for Entry  
If you do not have a Social Security Number for your dependent/beneficiary, please contact the Employee Service Center for assistance.

Continue Cancel

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**12** Complete all required fields (\*), then click **Continue**.

**Beneficiary Designations** What is a Beneficiary? [Close](#)

To add a person, enter data into the open fields below and click **Continue**.

When the "Address same as employee" checkbox is selected address fields are not editable.

\*Relationship:  \*Fulltime Student:  Yes  No

\*First Name:  \*Disabled:  Yes  No

Middle Name:  \*Medicare Eligible:  Yes  No

\*Last Name:  Address same as your address:

Suffix:  \*Country:

\*SSN:  \*Address Line 1:

\*Gender:  Address Line 2:

\*Date of Birth:  \*City:

\*State:

\*Postal Code:  ext:

\*Required Field When Available for Entry  
If you do not have a Social Security Number for your dependent/beneficiary, please contact the Employee Service Center for assistance.

**12**

**13** Review the information. If corrections are needed, click **Back**, and return to step 12.

**14** If no corrections are needed, click in the check box on the lower left side of the screen, then click **Save**.

**Beneficiary Designations** What is a Beneficiary? [Close](#)

Please verify the information below and click **Save**.

First Name:	Woodbridge	Address same as your address:	Yes
Middle Name:		Country:	United States
Last Name:	Monroe	Address Line 1:	155 Main St
Suffix:		Address Line 2:	
SSN:	XXX-XX-0110	City:	New Haven
Gender:	Male	State:	CT
Date of Birth:	1/1/2011	Postal Code:	06511 ext:
Fulltime Student:	No		
Disabled:	No		
Medicare Eligible:	No		

By checking this box, you are acknowledging that the dependent(s) you are adding or dropping to/from your benefits is based on the definition of an eligible dependent in accordance with Yale University plan rules. False responses may result in rescission of coverage and/or non-payment of claims for you or your eligible dependents as well as, discipline up to and including termination of employment.

**acknowledge the above statement**

**13**

Wilton Monroe Child 100%

**15** To update your designations, use the radio buttons, then click **Continue**.

**Beneficiary Designations** What is a Beneficiary? [Close](#)

Choose your beneficiary from the list or add a new beneficiary.

Name	Relationship	Beneficiaries		Not a Beneficiary
		Primary	Contingent <sup>1</sup>	
Anne Monroe	Spouse	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wilton Monroe	Child	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Woodbridge Monroe	Child	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

[Add Beneficiary](#)

<sup>1</sup>Contingent beneficiaries take effect only if all your primary beneficiaries die before you.

**15**

<p><b>16</b> Update your designation percentages, then click <b>Continue</b>.</p>																						
<p><b>17</b> Review the designation percentages. If corrections are needed, click <b>Back</b>, and return to step 16.</p> <p><b>18</b> If no corrections are needed, click <b>Save and Continue</b>.</p>																						
<p><b>19</b> You will see a confirmation that your <b>beneficiary designations</b> were saved successfully.</p> <p>You can log out or close your browser.</p>	<p style="text-align: center;"><b>Beneficiary Designations saved successfully.</b></p> <table border="1"> <thead> <tr> <th colspan="3">Basic Life</th> </tr> <tr> <th>Current Beneficiary Designations</th> <th>Relationship</th> <th>Benefit %</th> </tr> </thead> <tbody> <tr> <td colspan="3"><b>Primary</b></td> </tr> <tr> <td>Anne Monroe</td> <td>Spouse</td> <td>100%</td> </tr> <tr> <td colspan="3"><b>Contingent<sup>1</sup></b></td> </tr> <tr> <td>Wilton Monroe</td> <td>Child</td> <td>50%</td> </tr> <tr> <td>Woodbridge Monroe</td> <td>Child</td> <td>50%</td> </tr> </tbody> </table>	Basic Life			Current Beneficiary Designations	Relationship	Benefit %	<b>Primary</b>			Anne Monroe	Spouse	100%	<b>Contingent<sup>1</sup></b>			Wilton Monroe	Child	50%	Woodbridge Monroe	Child	50%
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