

Removing a Life Insurance Beneficiary

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 the [Employee Service Center](#) at 203-432-5552 to learn more about these life insurance benefits.

- Please note, at this time, 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.

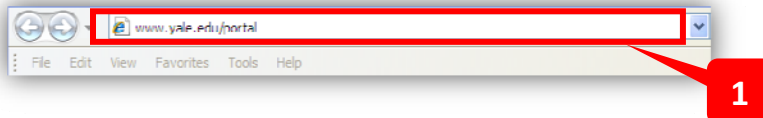
This guide describes two separate processes:

- (1) changing the beneficiary's percentage to zero
- (2) deleting the beneficiary's name, if desired

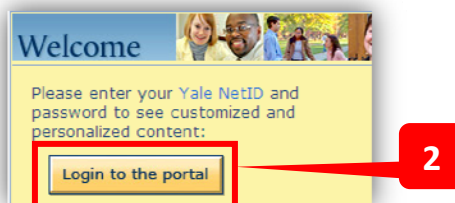
Performing # 1 is all that is required to effectively remove someone as a beneficiary.

2 (starting below on Step **11**) is included for those who no longer wish to see the beneficiary's name when logging into My Benefits. **Please note that deleting a beneficiary is only possible during the open enrollment period that follows a Qualifying Life Event.**

- 1** Open an internet browser and type in the following address to access the portal:
www.yale.edu/portal



- 2** On the portal homepage click the **Login to the portal** button and you will be directed to log in using your Yale NetID and password.

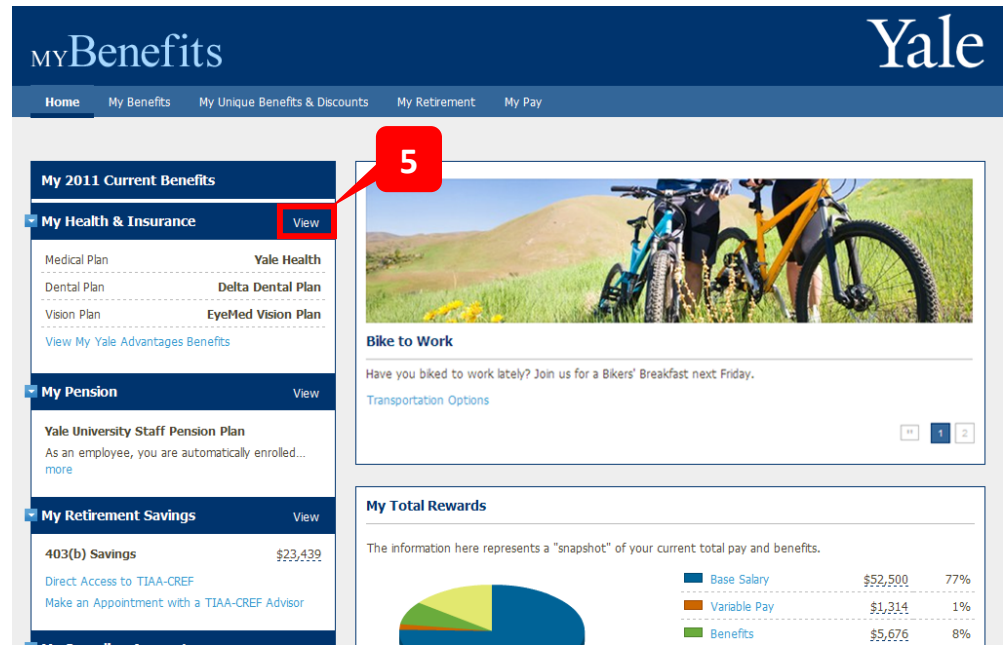


3 Click the **My Benefits** link on the upper right hand corner of the Portal.

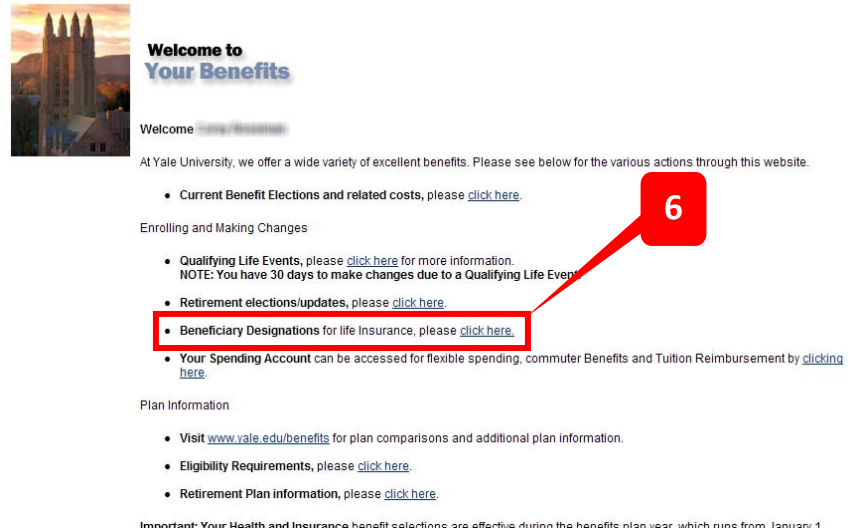
4 Faculty will see a different menu.



5 Click **View** in the **My Health & Insurance** box.



6 Select the link within the **Beneficiary Designations** bullet.



7 To remove a Beneficiary from your Life insurance or Supplemental life insurance, click **Edit Designations**.

Beneficiary Designations
A beneficiary is a person whom you designate be compensated upon your death. You may update beneficiary information at any time during the year.

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

Plan	Beneficiary	Relationship	Designation	Percentage
Basic Life	Ellen Scarsano	Mother	Primary	100%
Basic Life	Jeffrey Scarsano Scarsano	Father	Contingent	50%
Basic Life	Robert Scarsano	Brother	Contingent	50%
Supplemental Life	Ellen Scarsano	Mother	Primary	100%
Supplemental Life	Jeffrey Scarsano Scarsano	Father	Contingent	50%
Supplemental Life	Robert Scarsano	Brother	Contingent	50%

Edit Designations

If you have elected to participate in both **Basic** life insurance and **Supplemental** life insurance, you can choose different Beneficiaries and percentages for each plan. Beneficiaries can be added or removed from one plan or both plans, based on the percentages that you assign.

A Beneficiary cannot be deleted until the Beneficiary has been assigned 0% on all available Life insurance plans.

8 Locate the row containing information for the Beneficiary you would like to remove from your **Life** insurance or **Supplemental** life insurance.

In the appropriate row, select **None** from the Designation drop-down list.

Then change the Percentage for the Beneficiary to 0%.

My Profile

- My Information

My Health & Welfare Benefits

- Benefit Selections
- Beneficiary Designations
- Dependent Information
- Add Life Status Change Event
- My Life Status Change History

Beneficiary Designations
Step 1 of 2 - Add or change your beneficiary designations and click **Continue**. Click **Add Beneficiary** if not listed below.

To make changes to information below other than beneficiary designations, please contact your Human Resources administrator for assistance.

Plan	Beneficiary	Relationship	Designation	Percentage
Basic Life	Julia Monroe	Child	Contingent	50%
Basic Life	Sheila Monroe	Spouse	Primary	100%
Basic Life	Zachary Monroe	Child	Contingent	30%
Basic Life	Valerie Rose Monroe	Sister	Contingent	0%
Supplemental Life	Julia Monroe	Child	None	50%
Supplemental Life	Sheila Monroe	Spouse	Primary	100%
Supplemental Life	Zachary Monroe	Child	Contingent	50%
Supplemental Life	Valerie Rose Monroe	Sister	None	0%

Add Beneficiary **Back** **Continue**

9 Click **Continue**.

Supplemental Life	Zachary Monroe	Child	Contingent	50%
Supplemental Life	Valerie Rose Monroe	Sister	None	0%

Add Beneficiary **Back** **Continue**

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10 After updating your Beneficiary Designations and Percentages, click **Save**.

My Profile
• My Information

My Health & Welfare Benefits
• Benefit Selections
• Beneficiary Designations
• Dependent Information
• Add Life Status Change Event
• My Life Status Change History

Beneficiary Designations
Step 2 of 2 - Please confirm your designations below and click **Save**, or click **Back** to make changes.

Plan	Beneficiary	Relationship	Designation	Percentage
Basic Life	Julia Monroe	Child	Contingent	50%
Basic Life	Sheila Monroe	Spouse	Primary	100%
Basic Life	Zachary Monroe	Child	Contingent	50%
Supplemental Life	Julia Monroe	Child	Contingent	50%
Supplemental Life	Sheila Monroe	Spouse	Primary	100%
Supplemental Life	Zachary Monroe	Child	Contingent	50%

Back **Save**

At this point, you have effectively removed the individual as your beneficiary. Only proceed if you wish the beneficiary's name to no longer appear on the screen.

11 Click **My Health & Welfare Benefits**.

Yale **11** **HELP** **CONTACT** **FEEDBACK** **LOGOUT**

Welcome **My Health & Welfare Benefits** **My Other Benefits** **My Retirement Plans** **Benefits Estimator** **My Account**

You Are Here: **Welcome** | **My Account**

My Profile
• My Information

My Health & Welfare Benefits
• Benefit Selections
• Beneficiary Designations
• Dependent Information
• Add Life Status Change Event
• My Life Status Change History

Beneficiary Designations
A beneficiary is a person whom you designate be compensated upon your death. You may update beneficiary information at any time during the year.

Please review your beneficiary designations below. To edit your designations or to select a new beneficiary for the coverage shown, click **Edit Designations**.
Beneficiary Designations saved successfully.

Plan	Beneficiary	Relationship	Designation	Percentage
Basic Life	Julia Monroe	Child	Contingent	50%
Basic Life	Sheila Monroe	Spouse	Primary	100%
Basic Life	Zachary Monroe	Child	Contingent	50%
Supplemental Life	Julia Monroe	Child	Contingent	50%
Supplemental Life	Sheila Monroe	Spouse	Primary	100%
Supplemental Life	Zachary Monroe	Child	Contingent	50%

Edit Designations

12 Click **Enroll Online**.

(Some users may not see the **Enroll Online** button. Simply proceed to Step 13.)

Click below to enroll into group enrolled benefits.
Enroll Online

My Health & Welfare Benefits
Current Benefits
My Health & Welfare Benefits
• Yale Health Plan
• Aetna Choice POS II
• Aetna Choice POS II HDHP w/ HSA
• Delta Dental Plan
• EyeMed Vision
• Health Care Expense Reimbursement Account
• Child/Dependent Care Expense Reimbursement Account
Enrolled Benefits
Reference Center

Welcome to Your Benefits

Welcome **JAMES MONROE**

At Yale University, we offer a wide variety of excellent benefits. Through this website, you are able to:

- View your current benefit choices and related costs. (Visit [My Health & Welfare Benefits Center](#) for details.)
- Access benefit plan summaries and information for any group enrolled benefit. (Visit [My Health & Welfare Benefits Center](#) for details.)
- Edit your Beneficiary designations for your life insurance. (Visit [My Account](#), click the [Beneficiary Designations](#) link and follow the instructions.)
- View a detailed summary of your benefits (Visit [My Account](#), click the [Benefit Selections](#) link)
- Estimate benefits for Flexible spending and other benefits (Visit [Benefits Estimator](#) for details)

Inbox Notification
You have 0 new unread message(s). [Click here](#) to access your messages.

13 Click **Start Enrollment**.

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Start Enrollment

My Health & Welfare Benefits

Current Benefits

- My Health & Welfare Benefits
 - Yale Health Plan
 - Aetna Choice POS II
 - Aetna Choice POS II HDHP w/ HSA
 - Delta Dental Plan
 - EyeMed Vision
 - Health Care Expense Reimbursement Account
 - Child/Dependent Care Expense Reimbursement Account
- Enrolled Benefits Reference Center

Welcome to My Health & Welfare Benefits

Welcome JAMES MONROE

The benefits you are enrolled in display in the benefit summary below.

- To print your benefits summary, click the "Printer-Friendly Version" button below followed by the "Print Screen" button.
- To review information about your plan, eligibility and enrollment, and qualifying life event, click on the appropriate link in the Enrolled Benefits Reference Center.
- To view detailed information for any enrolled benefit, click on the benefit name in the "My Health & Welfare Benefits" box.

14 Scroll down to the **Dependent /Beneficiary Information** section.

Locate the row containing Beneficiary information for the Beneficiary you would like to remove from your **Life** insurance or **Supplemental** life insurance plan. In the corresponding row, click **Delete**.

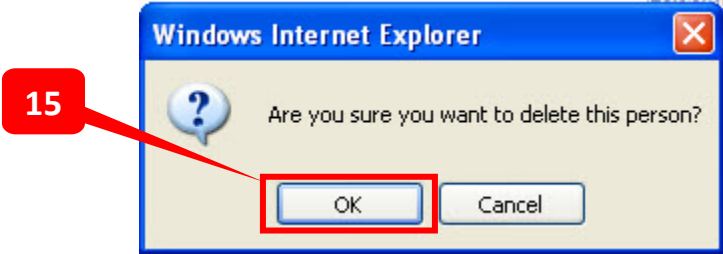
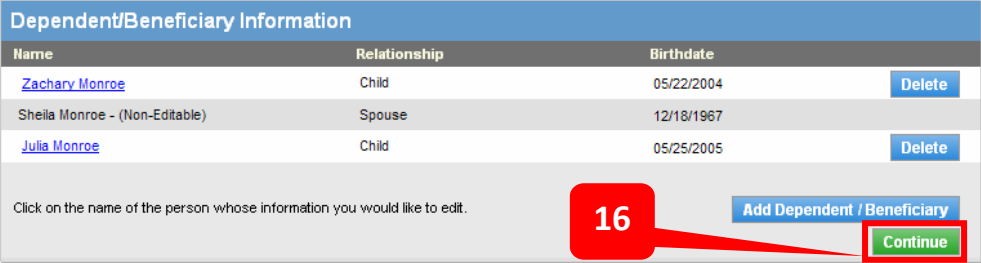
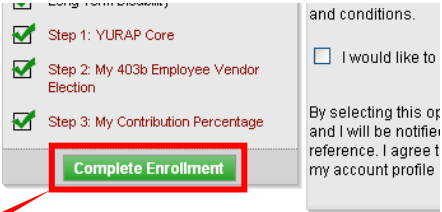
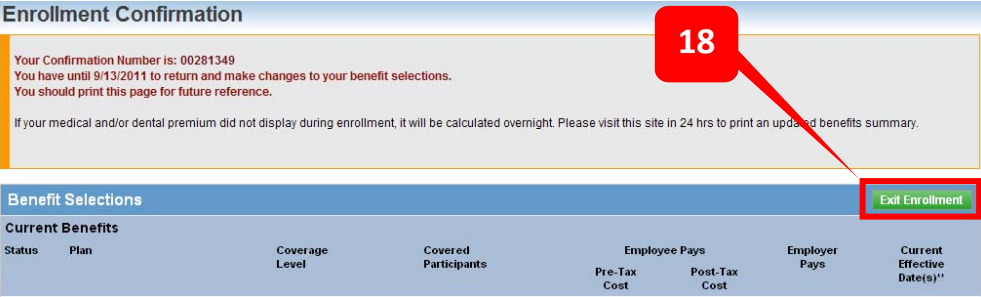
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Dependent/Beneficiary Information

Name	Relationship	Birthdate	
Valerie Monroe	Sister	12/03/1962	Delete
Sheila Monroe - (Non-Editable)	Spouse	12/18/1967	
Zachary Monroe	Child	05/22/2004	Delete
Julia Monroe	Child	05/25/2005	Delete

Click on the name of the person whose information you would like to edit.

[Add Dependent / Beneficiary](#)

<p>15 You will see the following message box: "Are you sure you want to delete this person?" Click OK.</p>																					
<p>16 Review your Beneficiary information. Then click Continue.</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship</th> <th>Birthdate</th> </tr> </thead> <tbody> <tr> <td>Zachary Monroe</td> <td>Child</td> <td>05/22/2004</td> </tr> <tr> <td>Sheila Monroe - (Non-Editable)</td> <td>Spouse</td> <td>12/18/1967</td> </tr> <tr> <td>Julia Monroe</td> <td>Child</td> <td>05/25/2005</td> </tr> </tbody> </table>	Name	Relationship	Birthdate	Zachary Monroe	Child	05/22/2004	Sheila Monroe - (Non-Editable)	Spouse	12/18/1967	Julia Monroe	Child	05/25/2005								
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<p>17 On the left side of the screen, click Complete Enrollment.</p>	 <p>and conditions.</p> <p><input type="checkbox"/> I would like to</p> <p>By selecting this option and I will be notified by email for future reference. I agree to update my account profile.</p> <p>Please verify the information for your dependent/beneficiary.</p> <p>IMPORTANT: Add dependent/beneficiary information and submit a request for enrollment.</p> <p>Please Note: Add dependent/beneficiary information need to revisit the site.</p> <p>Dependent/Beneficiary Information</p> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> </table>	Name																			
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<p>18 Click Exit Enrollment.</p>	 <p>Enrollment Confirmation</p> <p>Your Confirmation Number is: 00281349 You have until 9/13/2011 to return and make changes to your benefit selections. You should print this page for future reference.</p> <p>If your medical and/or dental premium did not display during enrollment, it will be calculated overnight. Please visit this site in 24 hrs to print an updated benefits summary.</p> <p>Benefit Selections</p> <table border="1"> <thead> <tr> <th colspan="2">Current Benefits</th> <th rowspan="2">Coverage Level</th> <th rowspan="2">Covered Participants</th> <th colspan="2">Employee Pays</th> <th rowspan="2">Employer Pays</th> <th rowspan="2">Current Effective Date(s)**</th> </tr> <tr> <th>Status</th> <th>Plan</th> <th>Pre-Tax Cost</th> <th>Post-Tax Cost</th> </tr> </thead> <tbody> <tr> <td colspan="8"> <p style="text-align: right;">Exit Enrollment</p> </td> </tr> </tbody> </table>	Current Benefits		Coverage Level	Covered Participants	Employee Pays		Employer Pays	Current Effective Date(s)**	Status	Plan	Pre-Tax Cost	Post-Tax Cost	<p style="text-align: right;">Exit Enrollment</p>							
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