Life & Work Events (LWE) Quick Reference Guide to updating Beneficiary Information

Log on to Employee Self-Service (ESS) using your network logon ID and password.

□ Click on the Life and Work Events (LWE) tab on the right side of the menu bar:

Employee Self Service Life and Work Events

□ On the left side of the screen under Change in Employee's Status click on the **Beneficiary Change** link.

NOTE: A new window or tab will open with the steps to update your Beneficiary information.

- First make sure the person or entity you would like as your Beneficiary is linked to your personnel record by clicking on the Family Members/Dependents link.
- □ Review beneficiaries (and/or dependents) listed in ESS. Click **Edit** to change or add information to existing records.
- □ To **add** a beneficiary that is not listed scroll to the bottom of the screen and click on the appropriate relationship button, i.e. **New Child**, **New Spouse**, **Other** (could even be something like the Humane Society) etc...
- □ When entering a **beneficiary** that will not be a dependent on a health plan you only need to enter the **name** and **address** (**NOTE**: Enter **USA** for the **Country first** to limit the **State** selection dropdown). If the beneficiary will ever be a dependent on health benefit plans enter date of birth, gender and social security number too.
- □ Click the **Review** button to review and then click the **Save** button and you will get a message the data was saved.

NOTE: Use the IE Explorer close Icon or **X** to close new window(s) or tab(s) when done.

Update Beneficiaries for County Life Insurance and other plans

□ For the **County Life Insurance** click on the **Beneficiary Change** link and click **Edit Plan**:

Selection for Beneficiary change				
Plan	Dependent Option			
Life				
Life Insurance	EE + Dependents - Coverage amount: 20,000.00 USD			
Change each plan above as necessary or if you do not have any changes clid				
Add Plan Edit Plan Remove Plan				

□ Then click **List of Beneficiaries** – you will see the list of Beneficiaries currently in the system with percentages for Primary and Contingent beneficiaries:

Name	Relationship	Beneficiary Percentage	Contingent Percentage
Kelly Smith	Spouse	75	0
Daniel Smith	Child	0	50
Suzanne Smith	Child	0	50
Non-Profit Humane Society	Other	25	0

- The percentages in each column must be whole numbers that add up to 100%. A percentage of 0 in either column indicates they are not a primary and/or contingent beneficiary. Adjust percentages to reflect your current beneficiaries and click Add Plan to Selection.
- □ Review and then Certify your changes for the County Life Insurance.
- Continue through the remaining LWE steps for instructions on how to update beneficiaries for Payroll, PERS, Supplemental Plans, & Deferred Compensation.

NOTE: Use the IE Explorer close Icon in **X** to close new window(s) or tab(s)