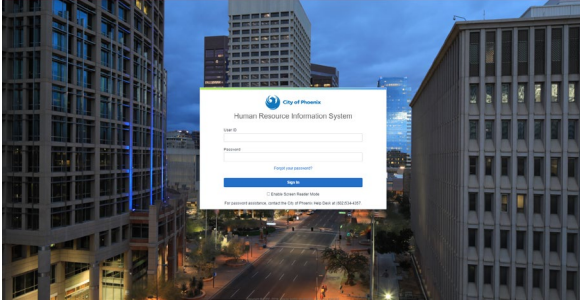


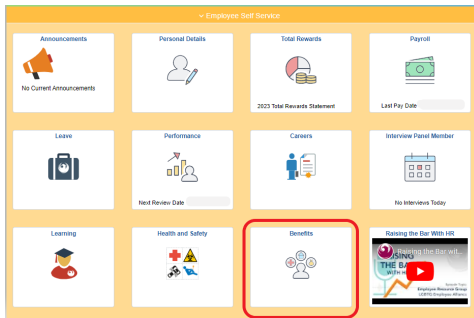
UPDATING LIFE BENEFICIARIES – INSTRUCTIONS

If you want to add a beneficiary or make a change to an existing beneficiary, follow these instructions. You may change the percentage amount for any beneficiary listed at any time. Keep in mind that primary designation and secondary designation totals must equal 100% each. Enter the whole number only (example, 50, do not enter 50% or 50.33.) The same person cannot be a primary and secondary beneficiary for the same policy. **You CANNOT delete or type over a name that was previously entered. The information is part of your history and will remain. Instead, if you have someone you no longer wish to have as a beneficiary, change their designation amount to zero.**

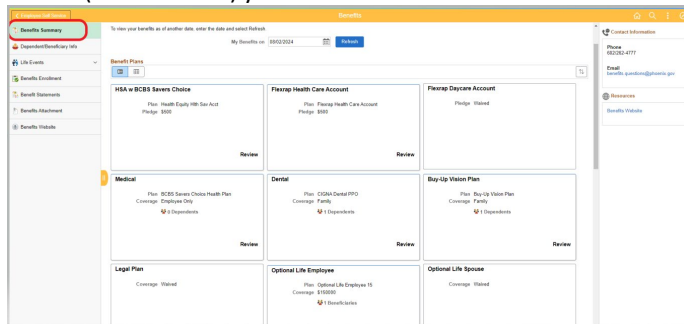
1. Log in to eCHRIS echris.phoenix.gov If you need assistance with password reset contact the Help Desk at 602-534-4357.



2. Click the **BENEFITS** tile



3. Once on the Benefits page select Benefits Summary from the **upper left-hand corner of the page**. This will bring up the current benefits (Benefit Plans) you are enrolled.



4. Scroll down until you get to the benefits that you can add a beneficiary. Those benefits are:
 - Basic Life Insurance
 - Basic AD/D
 - Optional Life Employee
 - Occupational AD/D
 - Commuter Life
 - No beneficiary name is needed for Optional Life Spouse and Optional Life Dependent Child, the employee is the default beneficiary.
5. Click on the tile of the benefit you want to add/review a beneficiary.

6. From that screen, you will see your existing beneficiaries or you can add a new beneficiary.
 - To add a beneficiary - Click **Add Beneficiary**
 - To updated beneficiary designations, click **Update Beneficiary Designation** and skip to “Allocating Beneficiary Designation” section of these instructions.

Basic Life Insurance

My Benefits on: 08/02/2024
 This is Current Enrollment

Life Insurance plays an important role in ensuring that your family is financially secure if you were to pass away.

Enrolled Plan: 1x Base Salary
 Plan Provider: Minnesota Life Insurance Company
 Coverage: Salary X 1
 Group Number: 04682001

Your Beneficiary Designation

Beneficiaries designated for the Basic Life Insurance is plan are listed here. Select the beneficiary to view or modify. To change your beneficiary allocations, select the Update Beneficiary Designation button.

Primary Allocation: Percent
 Secondary Allocation: Percent

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Total			
<input type="button" value="Add Beneficiary"/> <input type="button" value="Update Beneficiary Designation"/>			

Latest Deductions

Payroll deductions for the latest pay period for this benefit.

Plan Description	Employer Paid	Employee Contribution	Employer/Employee Contribution	Pay Period End Date
1x Base Salary	7.68	0.00		07/07/2024

7. Click on **Add Name**

Update Individual Dependent/Beneficiary Information

* Indicates required field

Select Save after you have added your Dependent/Beneficiary's information. The changes will go into effect on 8/2/2024.

Name

Personal Information

Date of Birth: MM/DD/YYYY

*Gender: [Dropdown]

*Relationship to Employee: [Dropdown]
 Dependent
 Beneficiary

*Marital Status: Single As of: MM/DD/YYYY

*Student: No As of: MM/DD/YYYY

Disabled: No As of: MM/DD/YYYY

*Employed by the City: No

Address

Address	Address Type	Same Address as mine
USA 1234 Disney Lane Imagine This, AZ 85000	Home	Same as mine

National ID

No National ID exists

8. Type in Beneficiary information and when finished, click **DONE**.

Name

Name Format: English

Name Prefix: [Dropdown]

*First Name: [Text Box]

Middle Name: [Text Box]

*Last Name: [Text Box]

Name Suffix: [Dropdown]

Display Name

Formal Name

Name

- You will be brought back to the Update Individual Dependent/Beneficiary Information page. Make sure to complete all required fields for the new beneficiary and the Benefits Certificate. Once you have filled the form to add your beneficiary, click **SAVE** in the upper right-hand corner of the screen. Follow on-screen save prompts.

Allocating Beneficiary Designation

- Click on the Update Beneficiary Designation button

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Total			

The Update Beneficiary Designation box will generate

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage	New Primary Percentage	New Secondary Percentage
Tangled Rose	Child			0	0
Ariel Rose	Child			0	0
		Total		0	0

- Allocate what percent of Life insurance goes to each beneficiary. (The percentage must be in whole numbers). The number must add up to 100%. If you go over, you will receive a pop-up reminder that you must allocate 100 percent to your primaries.

The screenshot shows the 'Update Beneficiary Designation' form. At the top, there are dropdown menus for 'Primary Allocation Method' and 'Secondary Allocation Method', both set to 'Percent'. Below is a table with columns: Beneficiary, Relationship, Current Primary Percentage, Current Secondary Percentage, New Primary Percentage, and New Secondary Percentage. The table contains two rows: Tangled Rose (Child) with 75% primary and 0% secondary, and Ariel Rose (Child) with 50% primary and 0% secondary. A 'Total' row shows 125% for the primary percentage and 0% for the secondary percentage. Below the table are two dropdown menus for 'Primary Excess Amount Goes To' and 'Secondary Excess Amount Goes To'. A 'Save' button is in the top right corner.

- Update the percent to reflect 100% and save by clicking the **SAVE** box in the upper right-hand corner of the box. Follow on-screen save prompts.

This screenshot is similar to the previous one but shows the 'New Primary Percentage' updated to 50% for both Tangled Rose and Ariel Rose. The 'Total' row now shows 100% for the primary percentage and 0% for the secondary percentage. The 'Save' button in the top right corner is highlighted with a red circle.

- You will be brought back to the life insurance page where you will see your current beneficiary(ies) listed.

Basic Life Insurance

My Benefits on 08/05/2024
This is Current Enrollment

Life insurance plays an important role in ensuring that your family is financially secure if you were to pass away

Enrolled Plan: 1x Base Salary
Plan Provider: Minnesota Life Insurance Company
Coverage: Salary X 1
Group Number: 056852501

Your Beneficiary Designation

Beneficiaries designated for the Basic Life Insurance plan are listed here. Select the beneficiary to view or modify. To change your beneficiary allocations, select the Update Beneficiary Designation button.

Primary Allocation: Percent
Secondary Allocation: Percent

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Tangled Rose	Child	50	>
Ariel Rose	Child	50	>
Total		100	0

[Add Beneficiary](#) [Update Beneficiary Designation](#)

Latest Deductions

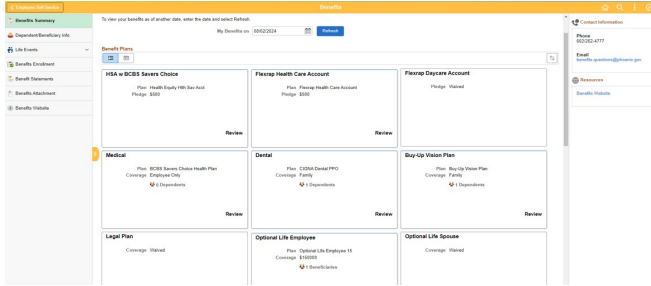
Payroll deductions for the latest pay period for this benefit.

Plan Description	Employer Paid	Employee Contribution	Employer-Employee Contribution	Pay Period End Date
1x Base Salary	7.68	0.00		07/07/2024

- At the top right-hand side of the window, click on "X". This will take you back to the list of enrollment types.

This screenshot shows the full 'Basic Life Insurance' page. The 'Update Beneficiary Designation' form is visible, and the 'Close' button in the top right corner of the window is highlighted with a red circle and an 'X' icon.

Back to the Benefit Summary Page



- Repeat these steps for all policies that require beneficiaries. You will not need to re-enter personal information. The person(s) you just added will now be listed.

Below, is a list of policies that include a beneficiary that you cannot update in eCHRIS:

The following may require updating of your beneficiaries:

Nationwide Beneficiary Form – 401a, 457 and PEHP (All Employees)

<https://www.phoenixdcp.com/iApp/tcm/phoenixdcp/support/index.jsp> (return form to Nationwide) 602-266-2733

COPERS Beneficiary Form (General City Employees) <https://www.phoenix.gov/copers/forms> (**Designation of Beneficiary**)

(Return form to COPERS, City Hall, 10th Floor, 200 W. Washington St., Phoenix, AZ 85003) 602-534-4400

PSPRS Beneficiary Form (Fire and Sworn Police Employees)

<https://www.psprs.com/forms--resources/retirees> (**Beneficiary Designation**) (Return form to COPERS, City Hall, 10th Floor, 200 W. Washington St., Phoenix, AZ 85003) THEY WILL FORWARD TO PUBLIC SAFETY RETIREMENT. 602-255-5575