

## NYIT Self-Service Application Changing Life Insurance Beneficiaries

The NYIT Self-Service Application gives employees access to view and change certain Benefits data. **Benefits information which can be changed includes Life Insurance beneficiary designations.** Other benefits can be changed as well but only during NYIT's Open Enrollment period. Changes made through this application will change the employee's NYIT Personnel Record in Human Resources.

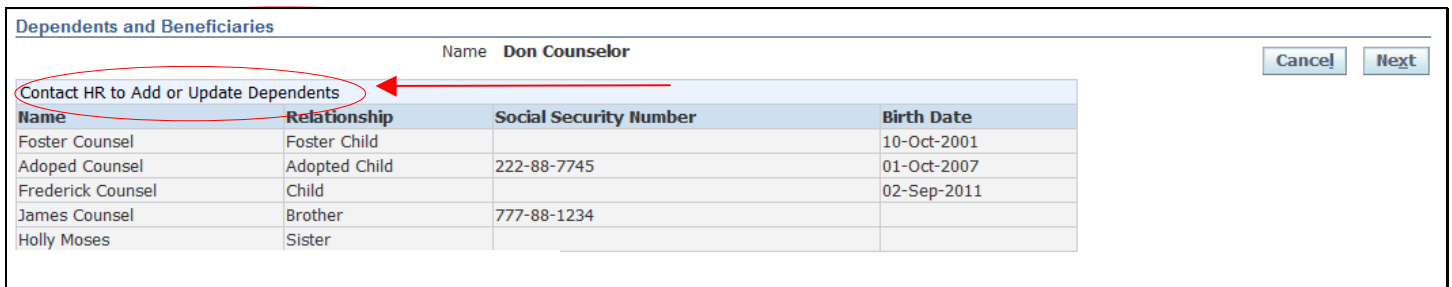
### NYIT Self Service Applications → Benefits → Dependents and Beneficiaries

From the Self Service menu choose 'Benefits'



The screenshot shows the Oracle Applications Home Page. On the left, there is a 'Navigator' pane with a tree view under 'NYIT Employee Self-Service'. The 'Benefits' link is highlighted with a red arrow. On the right, there is a 'Favorites' pane with a 'Personalize' button and a message: 'You have not selected any favorites. Please use the "Personalize" button to set up your favorites.'

1. The **Dependents and Beneficiaries** page will appear with a list of the employee's current beneficiaries and dependents. If you are interested in adding, removing or updating a beneficiary information on this screen, *you must contact Human Resources at 516-686-7668 or [humanresources@nyit.edu](mailto:humanresources@nyit.edu).*

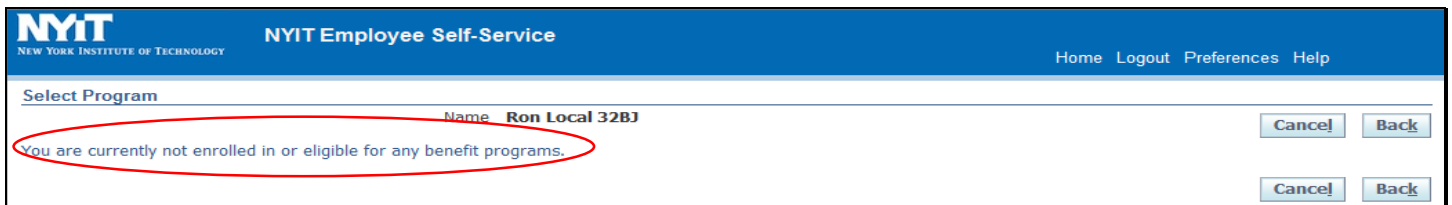


The screenshot shows the 'Dependents and Beneficiaries' page for employee 'Don Counselor'. A table lists the dependents:

Name	Relationship	Social Security Number	Birth Date
Foster Counsel	Foster Child		10-Oct-2001
Adoped Counsel	Adopted Child	222-88-7745	01-Oct-2007
Frederick Counsel	Child		02-Sep-2011
James Counsel	Brother	777-88-1234	
Holly Moses	Sister		

A red circle highlights the link 'Contact HR to Add or Update Dependents' in the top left corner of the table area. A red arrow points from this link to the 'Benefits' link in the previous screenshot.

2. Choose NEXT from the Dependents and Beneficiaries page.
  - **If you are not** enrolled in or eligible for NYIT benefits, you will be brought to the following screen. **If you are eligible for NYIT benefits but are not currently enrolled**, please contact Human Resources at the number or email address in step 1.



The screenshot shows the NYIT Employee Self-Service page for employee 'Ron Local 32BJ'. A message at the bottom of the page reads: 'You are currently not enrolled in or eligible for any benefit programs.' This message is circled in red.

- **If you are** currently enrolled in an **NYIT Active Benefits Program**, you will be asked to select the program you want to update.

**NYIT** NYIT Employee Self-Service Home Logout Preferences Help

Select Program Name

Please select a Program to update.

**Select Program Name**

NYIT Active Benefits Program

Retirement Pension Program

3. From this page, you must be in the **'Current Benefits'** tab to change beneficiaries.

**Benefits Enrollment** **Current Benefits** Name  Program **NYIT Active Benefits Program**

Please show me the benefits as of

**Benefit Selections**

Plan	Option	Coverage Start Date	Coverage Pre-Tax Rate	After-Tax Rate
Medical - UHC Active EPO	Employee + Family	01-Jan-2008		0.00
Dental - MetLife PPO Dental	Employee + Family	01-Sep-2007		0.00
LTD Annuity - LTD Annuity Group B	Enrolled	01-Sep-2011	7,389.33	0.00
Long Term Disability - Long Term Disability Group B	Enrolled	01-Sep-2011	7,389.33	0.00
Long Term Care - Long Term Care Insurance	Not Enrolled	01-Sep-2007		0.00
Life Insurance - Life Insurance	Enrolled	01-Sep-2007	100,000.00	0.00
FSA Healthcare - FSA Healthcare	Enrolled	01-Jan-2011	960.00	40.00
FSA Dependent Care - FSA Dependent Care Filing Joint	Not Enrolled	01-Jan-2011		0.00
<b>Total</b>			<b>40.00</b>	<b>0.00</b>

**Covered Dependents**

Plan	Option	Coverage Start Date	Dependent	Relationship	Social Security Number
Medical - UHC Active EPO	Employee + Family	01-Jan-2008		Child	
				Child	
				Spouse	
Dental - MetLife PPO Dental	Employee + Family	01-Sep-2007		Child	
				Spouse	

**Beneficiaries**

Plan	Option	Beneficiary	Relationship	Social Security Number	Primary %	Contingent %
Life Insurance - Life Insurance	Enrolled		Spouse		20	0
			Child		40	0
			Child		40	0

4. When you click **'Update Beneficiaries'**, you will be brought back to the **Dependents and Beneficiaries** screen. Since this step has to be performed by HR, click **NEXT**.

**Dependents and Beneficiaries** Name **Don Counselor**

Contact HR to Add or Update Dependents

Name	Relationship	Social Security Number	Birth Date
Foster Counsel	Foster Child		10-Oct-2001
Adoped Counsel	Adopted Child	222-88-7745	01-Oct-2007
Frederick Counsel	Child		02-Sep-2011
James Counsel	Brother	777-88-1234	
Holly Moses	Sister		

**TIP** Press update icon to validate address and other information.

- From the Update Beneficiaries screen you can change the percentages associated with each beneficiary and also designate them as either a primary or contingent (secondary) beneficiary.

Benefits Enrollment | Current Benefits

Update Beneficiaries Confirmation Statement

Update Beneficiaries Name **Ted Non-AAUP-Faculty** Program **NYIT Active Benefits Program** Back Next

**Beneficiary Selection**

Life Insurance : Life Insurance Enrolled

Family Members and Others

Beneficiary	Relationship	Social Security Number	Primary %	Contingent %	Clear
Dee Sloan	Nephew	555-55-7777	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="checkbox"/>
Mya Faculty	Child	058-74-6662	<input type="text" value="100"/>	<input type="text" value="0"/>	<input type="checkbox"/>
Ted Non-AAUP-Faculty	Self	123-45-1116	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="checkbox"/>

**Note** The following beneficiaries do not exist: Mya Faculty . You should remove these beneficiary designations.

Primary %	Contingent %
100	0

**TIP** Total Percentages for the plan must equal 100

- Once your beneficiary elections are complete, click on the recalculate button – the total of either the primary or contingent percentages must equal 0% or 100%; if they do not, you will receive an error and be unable to advance to the next step.

**Error**  
The total allocations (including family members and organizations, if applicable) for each plan must equal 0% or 100%. Please modify your allocations.

Update Beneficiaries Name **Ted Non-AAUP-Faculty** Program **NYIT Active Benefits Program** Back Next

**Beneficiary Selection**

Life Insurance : Life Insurance Enrolled

Family Members and Others

Beneficiary	Relationship	Social Security Number	Primary %	Contingent %	Clear
Dee Sloan	Nephew	555-55-7777	<input type="text" value="50"/>	<input type="text" value=""/>	<input type="checkbox"/>
Mya Faculty	Child	058-74-6662	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="checkbox"/>
Ted Non-AAUP-Faculty	Self	123-45-1116	<input type="text" value="0"/>	<input type="text" value="50"/>	<input type="checkbox"/>

**Note** The following beneficiaries do not exist: Mya Faculty . You should remove these beneficiary designations.

Primary %	Contingent %
50	50

**TIP** Total Percentages for the plan must equal 100

Also, if you have changed the status of a beneficiary, you may get an error if that new status severs the relationship required to designate them as a beneficiary. Below are two potential error messages.

**Error**  
Row 1 Error - This person cannot be designated as a beneficiary, because their contact relationship type does not match any of the designation requirements for this plan and option. Plan: Life Insurance Option: Enrolled

Update Beneficiaries Name **Ted Non-AAUP-Faculty** Program **NYIT Active Benefits Program** Back Next

**Beneficiary Selection**

Life Insurance : Life Insurance Enrolled

Family Members and Others

Beneficiary	Relationship	Social Security Number	Primary %	Contingent %	Clear
Dee Sloan	Nephew	555-55-7777	<input type="text" value="100"/>	<input type="text" value="0"/>	<input type="checkbox"/>
Mya Faculty	Child	058-74-6662	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="checkbox"/>
Ted Non-AAUP-Faculty	Self	123-45-1116	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="checkbox"/>

**Note** The following beneficiaries do not exist: Mya Faculty . You should remove these beneficiary designations.

Primary %	Contingent %
100	0

**TIP** Total Percentages for the plan must equal 100

Benefits Enrollment | Current Benefits

Update Beneficiaries | Confirmation Statement

**Error**  
The following beneficiaries do not exist: Mya Faculty . You should remove these beneficiary designations.

Update Beneficiaries

Name **Ted Non-AAUP-Faculty** Program **NYIT Active Benefits Program** [Back](#) [Next](#)

**Beneficiary Selection**

Life Insurance : Life Insurance Enrolled

Family Members and Others

Beneficiary	Relationship	Social Security Number	Primary %	Contingent %	Clear
Dee Sloan	Nephew	555-55-7777	0	0	
Mya Faculty	Child	058-74-6662	100		
Ted Non-AAUP-Faculty	Self	123-45-1116	0	0	

**Note** The following beneficiaries do not exist: Mya Faculty . You should remove these beneficiary designations.

[Recalculate](#)

Primary %	Contingent %
100	0

**TIP** Total Percentages for the plan must equal 100

- If you are satisfied with your changes, click NEXT to review the confirmation screen below. In general, **'Warnings' do not prevent you from proceeding with your enrollment changes. You should ignore the Warning messages for one of two reasons: 1. You have already performed the 'optional action items' listed and/or 2. The action item required is unrelated to the change you just completed.** If necessary, contact HR contact Human Resources at the number or email address in step 1.

7. Determine if you want to go 'Back' to revisit your changes, create a 'Printable Page', produce a 'Confirmation Statement' or 'Finish' your work.

Benefits Enrollment | Current Benefits

Update Beneficiaries | Confirmation Statement

**Warning**

- Your changes have been saved. However, there are additional action items to complete for the enrollments you selected. Any required action item suspends the election. Optional action items are requests for additional information. These include:
- MetLife PPO Dental - <Optional> - The option you have chosen for this plan requires that you designate a dependent. <Optional> - The option you have chosen for this plan requires that you designate a dependent.

Confirmation Statement

Name \_\_\_\_\_ Program **NYIT Active Benefits Program** [Back](#) [Printable Page](#) [Confirmation Statement](#) [Finish](#)

**TIP** Click Confirmation Statement to get a PDF document of your enrollments. Click Finish to complete the enrollment process, then click the Logout link when you are ready to leave the application.

**Beneficiaries**

Plan	Option	Beneficiary	Relationship	Social Security Number	Primary %	Contingent %
Life Insurance - Life Insurance Enrolled				129-88-1111	75	0
				129-88-2222	25	0

8. When you click on 'Printable Page' you will get the page below which you can print for your records – open the FILE window to get print options.

File Edit View Favorites Tools Help

**Warning**

- Your changes have been saved. However, there are additional action items to complete for the enrollments you selected. Any required action item suspends the election. Optional action items are requests for additional information. These include:
- MetLife PPO Dental - <Optional> - The option you have chosen for this plan requires that you designate a dependent. <Optional> - The option you have chosen for this plan requires that you designate a dependent.

Confirmation Statement

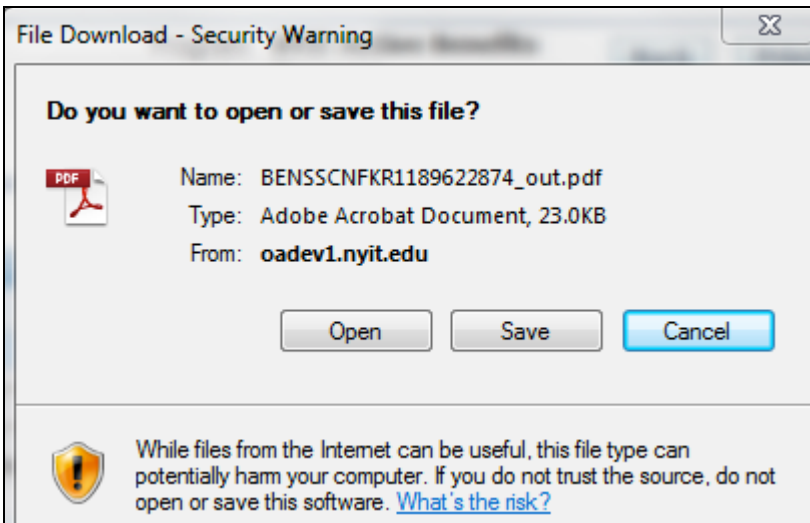
Name \_\_\_\_\_ Program **NYIT Active Benefits Program**

**TIP** Click Confirmation Statement to get a PDF document of your enrollments. Click Finish to complete the enrollment process, then click the Logout link when you are ready to leave the application.

**Beneficiaries**

Plan	Option	Beneficiary	Relationship	Social Security Number	Primary %	Contingent %
Life Insurance - Life Insurance Enrolled			Spouse	129-88-1111	75	0
			Child	129-88-2222	25	0

9. When you click on 'Confirmation Statement' you get the prompt below to OPEN or SAVE the PDF document.



10. If you want to save it to your computer for later access, choose 'Save'. If you choose 'Open', the PDF document, **NYIT Benefits Confirmation & Summary**, will appear – you can keep this statement for your records.

File Edit View Window Help

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## Benefits Confirmation & Summary

Employee Number  
4018

As a result of your event on date 18-Oct-2011, you have elected the following benefits. You have also authorized NYIT to deduct from your compensation any and all elected or required contributions or costs for NYIT Active Benefits Program. You acknowledge that by electing NYIT Active Benefits Program benefits, you are authorizing deductions with respect to those benefits that will remain in effect at least until the next open enrollment period, or until you are able to make a change to your benefits as a result of a qualifying life event. You recognize that this election of benefits as stated below will carry over for each subsequent plan year, to the extent such benefits continue to be offered, unless you elect otherwise in a subsequent enrollment period.

**Beneficiaries**  
These are the beneficiaries you have named for the plans listed below.

Plan Name	Option	Full Name	Relationship	Primary	Contingent
Life Insurance - Life Insurance	Enrolled		Spouse	75.00	0.00
			Child	25.00	0.00

For additional information, please contact Terri Katsch in Human Resources at [tkatsch@nyit.edu](mailto:tkatsch@nyit.edu) or call 516.686.7668.

Regards,  
NYIT Benefits Department

11. If you click 'Finish', you'll get the summary of your current benefits. **Note:** when you choose 'Finish' then click NEXT, you will be at the beginning of the process where you 'Change Program' or 'Update Benefits'— choosing this option will not allow you to access the 'Confirmation Statement' above.

NYIT
NYIT Employee Self-Service
Home Logout Preferences Help

Benefits Enrollment
Current Benefits

**Current Benefits**

Name Program **NYIT Active Benefits Program**

Please show me the benefits as of 01-Mar-2011 and later Go

**Benefit Selections**

Plan	Option	Coverage Start Date	Coverage	Pre-Tax Rate	After-Tax Rate	Taxable
Medical - Medical - Dental Waiver	Employee + Family	01-Jul-2008		0.00	0.00	0.00
Dental - MetLife PPO Dental	Employee + Family	01-Feb-2009		0.00	0.00	0.00
LTD Annuity - LTD Annuity Group A	Not Enrolled	01-Feb-2008		0.00	0.00	0.00
Long Term Disability - Long Term Disability Group A	Enrolled	01-Mar-2011	6,249.40	0.00	0.00	0.00
Long Term Care - Long Term Care Insurance	Not Enrolled	01-Feb-2008		0.00	0.00	0.00
Life Insurance - Life Insurance	Enrolled	01-Jul-2008	100,000.00	0.00	0.00	0.00
FSA Healthcare - FSA Healthcare	Enrolled	01-Jan-2011	2,000.00	83.33	0.00	0.00
FSA Dependent Care - FSA Dependent Care Filing Joint	Not Enrolled	01-Jan-2011		0.00	0.00	0.00
<b>Total</b>				<b>83.33</b>	<b>0.00</b>	<b>0.00</b>

**Covered Dependents**

Plan	Option	Coverage Start Date	Dependent	Relationship	Social Security Number
Medical - Medical - Dental Waiver	Employee + Family	01-Apr-2008		Spouse	129-88-1111
		01-Apr-2008		Child	129-88-2222

**Beneficiaries**

Update Beneficiaries

Plan	Option	Beneficiary	Relationship	Social Security Number	Primary %	Contingent %
Life Insurance - Life Insurance	Enrolled			129-88-1111	75	0
				129-88-2222	25	0