

HOW TO UPDATE FAMILY DATA

IDB RETIREE SELF-SERVICES


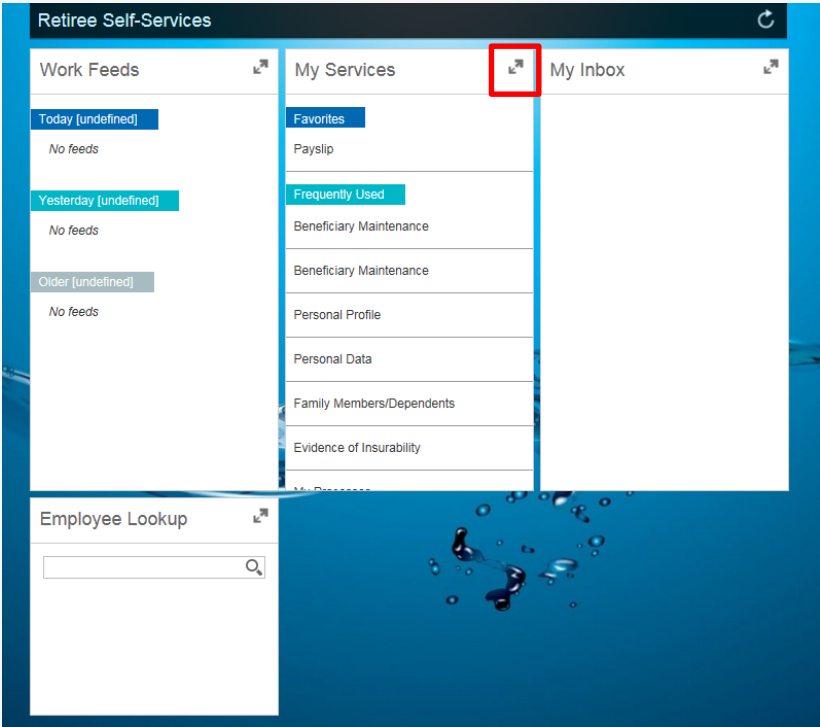

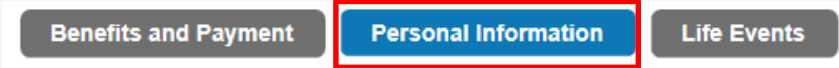
Objective

- ✓ How to change the retirees' registered family data through Retiree Self-Services.



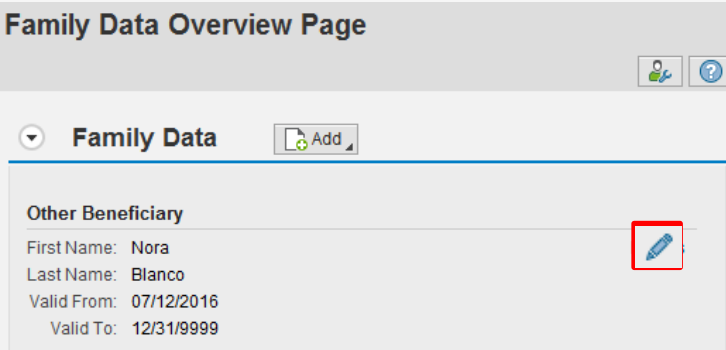
Notes

- ✓ *If you wish to add a family member to your beneficiary list, please refer to the “Assign Beneficiaries” user guide available at www.iadb.org/RetireeSelfServices*
- ✓ *To add a spouse, domestic partner, child or stepchild, that you wish to include in your medical insurance, please refer to the user guides “Register a Marriage/ Domestic Partnership” or “Register a Birth/Adoption available at www.iadb.org/RetireeSelfServices*

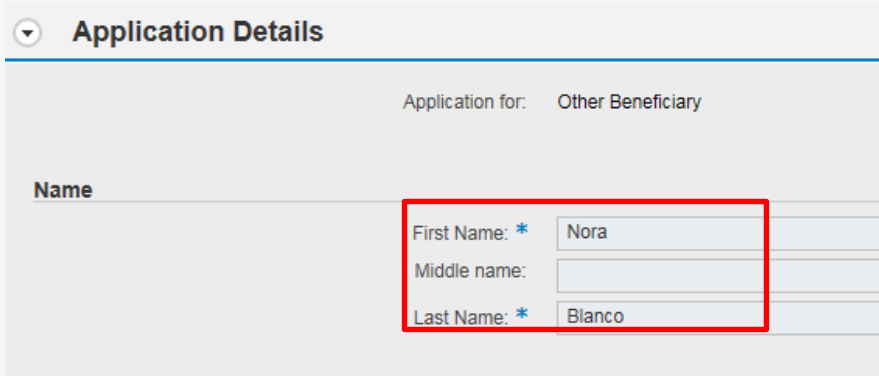
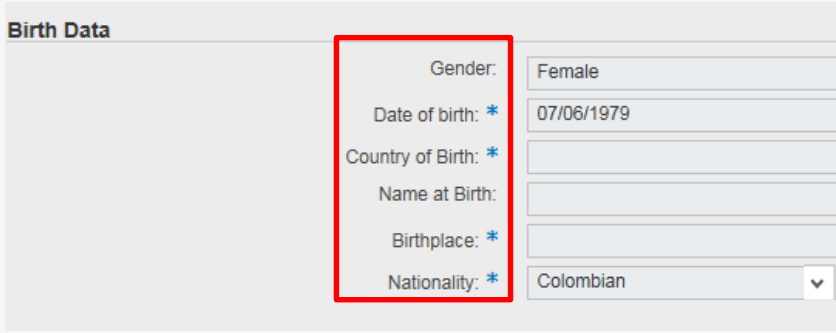
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Instruction	View
1) Go to “My Services” and  .	
2) Click  .	


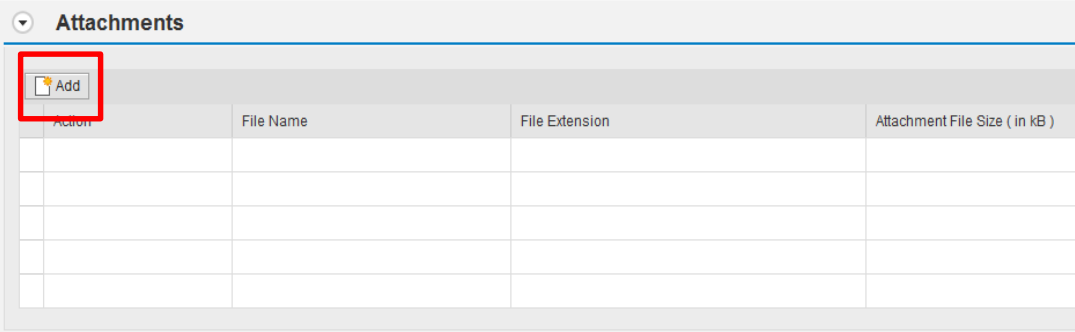
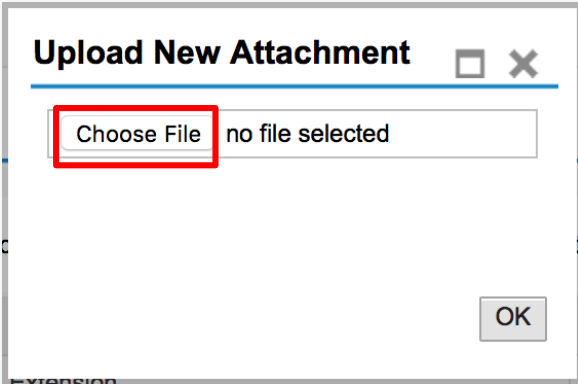
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Instruction	View
<p>3) Go to “Personal Information” and click “Family Members/ Dependents”.</p> <p><i>(You can also click on the star ★ to add “Family Members/Dependents” to your Favorites, which can be found on the first page of your Retiree Self-Service right below “My Services”).</i></p>	 <p>The screenshot shows a vertical menu titled "Personal Information". It contains four items: "Beneficiary Maintenance", "Personal Profile", "Personal Data", and "Family Members/Dependents". Each item has a star icon to its right. The "Family Members/Dependents" item is highlighted with a red rectangular box.</p>
<p>4) Click on the  icon of the family member whose data you would like to update.</p>	 <p>The screenshot shows the "Family Data Overview Page". It has a header with a user icon and a help icon. Below the header is a section titled "Family Data" with a dropdown arrow and an "Add" button. Underneath is a table with one row titled "Other Beneficiary". The table contains the following information: "First Name: Nora", "Last Name: Blanco", "Valid From: 07/12/2016", and "Valid To: 12/31/9999". A red box highlights a pencil icon in the rightmost column of the table, indicating the edit function.</p>

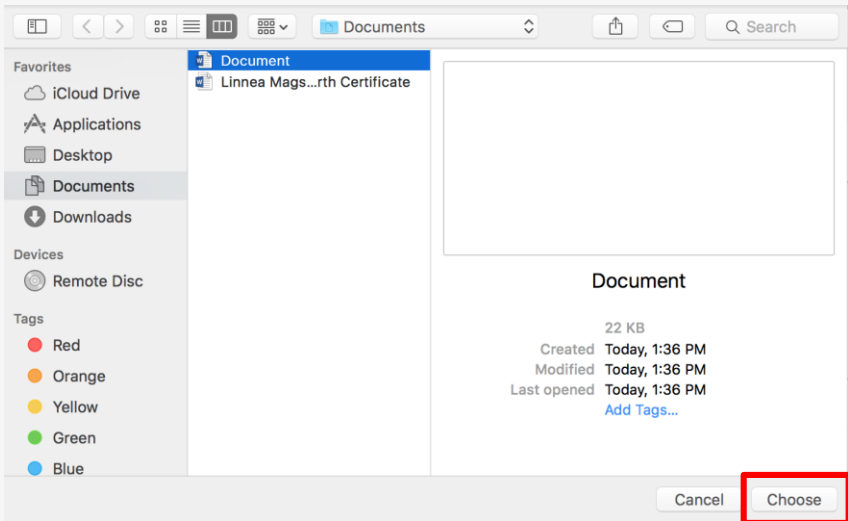



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Instruction	View
<p>5) If you wish to update the first name or last name of the family member, go to “Name”.</p> <p><i>The fields with asterisks * are mandatory.</i></p>	 <p>Application Details</p> <p>Application for: Other Beneficiary</p> <p>Name</p> <p>First Name: * Nora</p> <p>Middle name:</p> <p>Last Name: * Blanco</p>
<p>6) If you would like to update gender, date of birth, country of birth, name at birth, city at birth or nationality of the family member, go to “Birth Data”.</p> <p><i>The fields with asterisks * are mandatory.</i></p>	 <p>Birth Data</p> <p>Gender: Female</p> <p>Date of birth: * 07/06/1979</p> <p>Country of Birth: *</p> <p>Name at Birth:</p> <p>Birthplace: *</p> <p>Nationality: * Colombian</p>





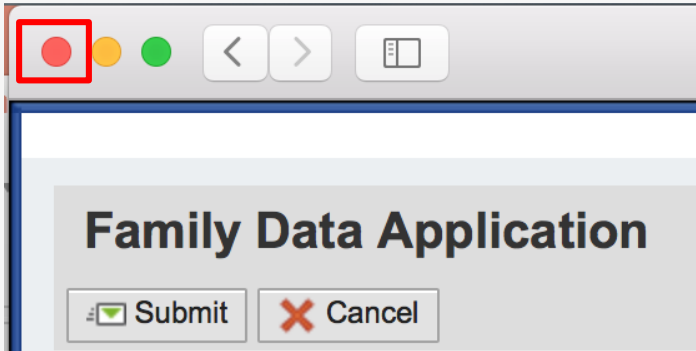
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Instruction	View
<p>7.1) To add supporting documents, go to “Attachments”.</p> <p>7.2) Click  .</p>	
<p>8) Click “Choose File” and select the corresponding documents (passport, ID, or birth certificate...).</p> <p><i>You are able to select any of the following documents (JPEG, PDF, Word, PowerPoint...).</i></p>	

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Instruction	View								
9) Once you select the document, click <div>Choose</div> .									
10) Verify if the file has saved.	<table><tr><th>Action</th><th>File Name</th><th>File Extension</th><th>Attachment File Size (in kB)</th></tr><tr><td></td><td>attach test 1.txt</td><td>text/plain</td><td>22</td></tr></table>	Action	File Name	File Extension	Attachment File Size (in kB)		attach test 1.txt	text/plain	22
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	attach test 1.txt	text/plain	22						

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Instruction	View
11) Accept the Terms and Conditions by clicking on <input type="checkbox"/> .	I acknowledge and accept the: Terms & Conditions <input type="checkbox"/>
12) To finish, go to the top of the page and click “ Submit ”.	
13) The following message will display.	<div> <div>  Please make sure you use Life Events for changes that involve benefits. </div> <div>  Request succesfully sent to HR Officer for Approval </div> </div>
14) To return to the main menu, close the window by clicking  .	

Need help on how to access or navigate
your Retiree Self-Services?

More user guides and video tutorials at:

www.iadb.org/RetireeSelfServices

Recommended browsers:

Internet Explorer for PC/Windows

Safari for Mac/Apple

