


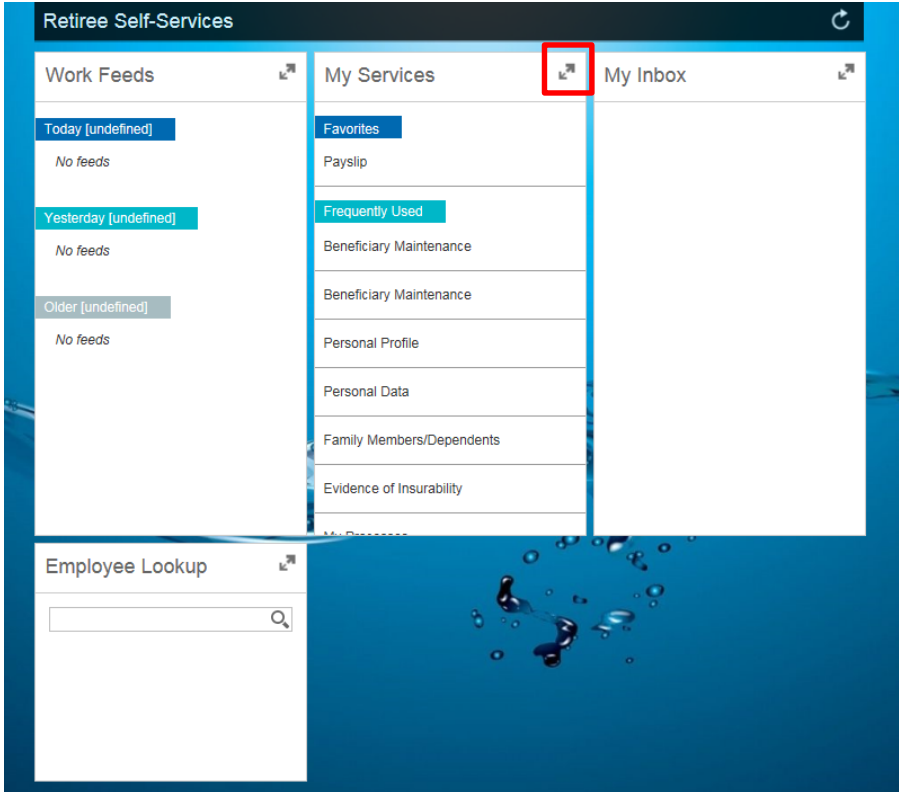

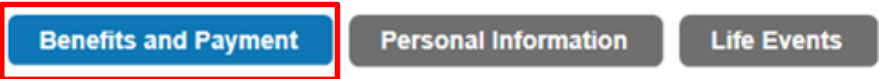
HOW TO ASSIGN BENEFICIARIES

IDB RETIREE SELF-SERVICES

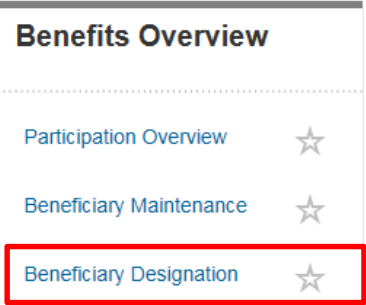
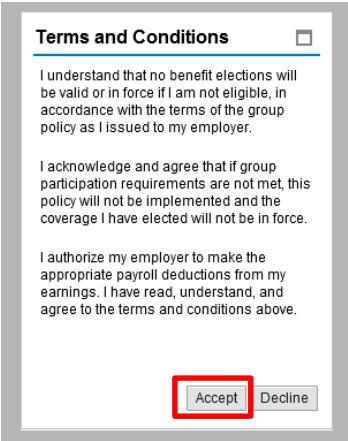
Objective

- ✓ To assign beneficiaries to the retiree's Life Insurance Plan through the Retiree Self-Services.

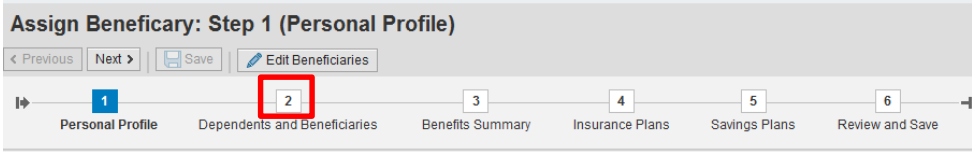
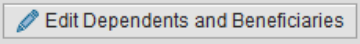
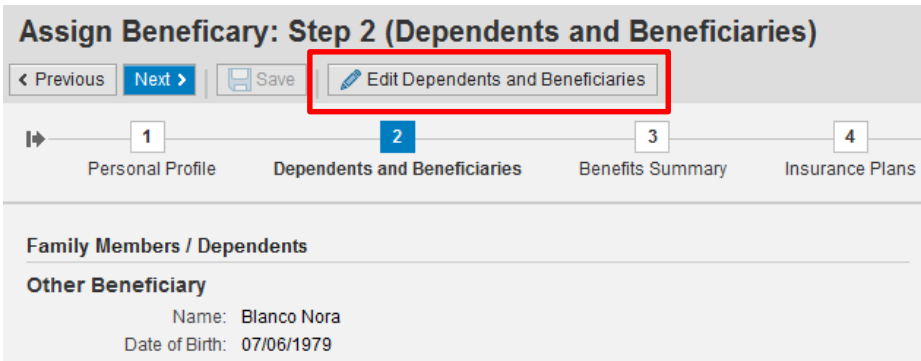
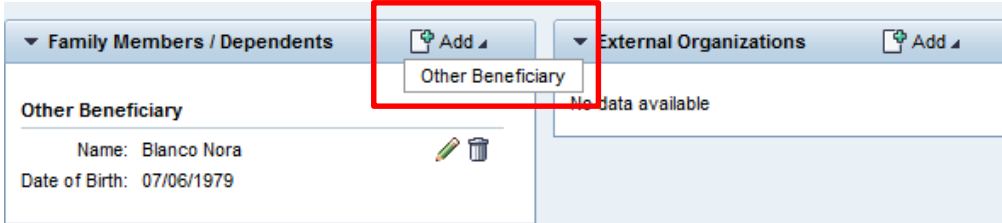
ASSIGN BENEFICIARIES

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



ASSIGN BENEFICIARIES

Instruction	View
<p>3) Go to “Benefits Overview” and click “Beneficiary Designation”.</p> <p><i>(You can also click on the star ★ to add “Beneficiary Designation”, which can be found on the first page of your Retiree Self-Service right below “My Services”).</i></p>	
<p>4) You will receive a message containing the Terms and Conditions of the beneficiary designation. Read the Terms and Conditions and click <input type="button" value="Accept"/> to proceed.</p>	

ASSIGN BENEFICIARIES


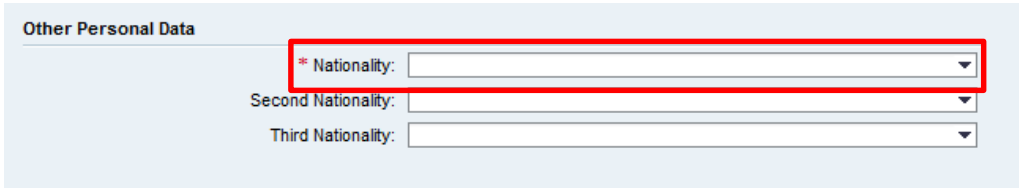
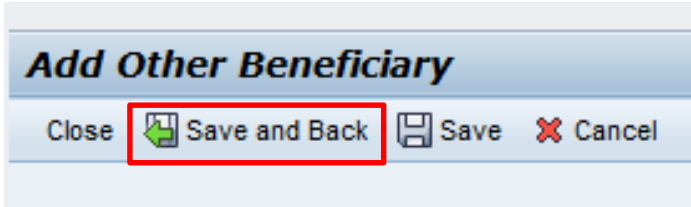
Instruction	View
<p>5) Click 2 to view the page of your beneficiaries.</p>	 <p>Assign Beneficiary: Step 1 (Personal Profile)</p> <p>< Previous Next > Save Edit Beneficiaries</p> <p>1 Personal Profile 2 Dependents and Beneficiaries 3 Benefits Summary 4 Insurance Plans 5 Savings Plans 6 Review and Save</p>
<p>6) Click</p> 	 <p>Assign Beneficiary: Step 2 (Dependents and Beneficiaries)</p> <p>< Previous Next > Save Edit Dependents and Beneficiaries</p> <p>1 Personal Profile 2 Dependents and Beneficiaries 3 Benefits Summary 4 Insurance Plans</p> <p>Family Members / Dependents</p> <p>Other Beneficiary</p> <p>Name: Blanco Nora Date of Birth: 07/06/1979</p>
<p>7) Click Add and select Other Beneficiary to add a beneficiary.</p>	 <p>Family Members / Dependents Add External Organizations Add</p> <p>Other Beneficiary</p> <p>Name: Blanco Nora Date of Birth: 07/06/1979</p> <p>No data available</p>

ASSIGN BENEFICIARIES

Instruction	View
<p>8.1) Go to “Name”.</p> <p>8.2) Click “First Name”* and write the first name of the beneficiary.</p> <p>8.3) Click “Last Name”* and write the last name of the beneficiary.</p>	<div data-bbox="678 305 1821 504"> <p>Name</p> <div> <div>8.2)</div> <div>* First name: <input type="text"/></div> </div> <div> <div>8.3)</div> <div>* Last name: <input type="text"/></div> </div> <div>Title: <input type="text"/></div> </div>
<p>9.1) Go to “Date of Birth”.</p> <p>9.2) Click on the  icon found on the field of “Date of Birth” and select the date of birth.</p> <p>9.3) Select the gender of the beneficiary.</p>	<div data-bbox="678 689 1821 992"> <p>Date of Birth</p> <div> <div>* Date of Birth: <input type="text"/></div> <div>9.2)</div> <div></div> </div> <div> <div>Name at Birth: <input type="text"/></div> </div> <div> <div>Gender:</div> <div> <input checked="" type="radio"/> Female 9.3) <input type="radio"/> Male <input type="radio"/> unknown </div> </div> </div>

**Fields with asterisks are mandatory.*


ASSIGN BENEFICIARIES


Instruction	View
<p>10.1) Go to “Other Personal Data”.</p> <p>10.2) Display the menu found on the field “Nationality” *  and select the nationality of the beneficiary.</p>	
<p>11) To save all the information, go to the top of the page and click “Save and Back”.</p>	

**Fields with asterisks are mandatory.*

ASSIGN BENEFICIARIES

Instruction

12.1) Click “Insurance Plans”  to view the details of your “Retiree Life Insurance”.


12.2) Click on the  icon.

View

Assign Beneficiary: Step 4 (Insurance Plans)

< Previous

Next >



1

2

3

4

12.1)

5

6

Personal Profile

Dependents and Beneficiaries


Benefits Summary

Insurance Plans

Savings Plans

Review and Save

Enroll in Insurance Plans

Acti...	Plan Type	Starts On	Status	Plan Name	Option	Coverage	Beneficiaries	Pre-Tax Costs	Post-
<div>12.2)</div>	Ret Life Ins	07/13/2016	Current	Retiree Life Insurance	Low Option	10,000.00 USD	Alimoon Hoosein (50%), Maqsood Hoosein (30%), Ibrahim Hoosein (20%)		

ASSIGN BENEFICIARIES

Instruction

13.1) Scroll to the percentages of each beneficiary found under the column “**Primary Percentage**”. Assign the desired percentage to your beneficiary. Always make sure the total is 100.

13.2) Click **Add** to proceed.

View

https://portalsaps.iadb.org/?NavigationTarget=ROLES%3A%2F%2Fportal_content%2Fcom.sap.pct%2Fever - Internet Explorer

Select a Ret Life Ins Plan







Plan Name	Option	Coverage	Pre-Tax Costs	Post-Tax Costs
Retiree Life Insurance	Low Option	10,000.00		

Designate Beneficiaries

Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)
Alimoon Hoosein	Spouse	50	0
Maqsood Hoosein	Child	30	0
Ibrahim Hoosein	Child	0	0
Ifran Ali	Child	0	0
Amjadally Inshanally	Father-in-Law	0	0
Ibrahim Hoosein	Other Beneficiary	20	0
Total		100	0

13.2) Add Cancel

ASSIGN BENEFICIARIES

Instruction	View																
<p>14.1) Click “Savings Plans”  to view the details on “Staff Retirement Plan”*. </p> <p>14.2) Click on the  icon.</p>	<div><div>Assign Beneficiary: Step 5 (Savings Plans)</div><div><div>< Previous</div><div>Next ></div><div></div></div><div><div>1</div><div>2</div><div>3</div><div>4</div><div><div>5</div>14.1)</div><div>6</div></div><div><div>Personal Profile</div><div>Dependents and Beneficiaries</div><div>Benefits Summary</div><div>Insurance Plans</div><div>Savings Plans</div><div>Review and Save</div></div><div>Enroll in Savings Plans</div><table><tr><th>Acti...</th><th>Plan Type</th><th>Starts On</th><th>Status</th><th>Plan Name</th><th>Beneficiaries</th><th>Pre-Tax Costs</th><th>Post-Tax C</th></tr><tr><td> 14.2)</td><td>IDB RP</td><td>07/13/2016</td><td>Current</td><td>Staff Retirement Plan</td><td></td><td></td><td></td></tr></table></div>	Acti...	Plan Type	Starts On	Status	Plan Name	Beneficiaries	Pre-Tax Costs	Post-Tax C	 14.2)	IDB RP	07/13/2016	Current	Staff Retirement Plan			
Acti...	Plan Type	Starts On	Status	Plan Name	Beneficiaries	Pre-Tax Costs	Post-Tax C										
 14.2)	IDB RP	07/13/2016	Current	Staff Retirement Plan													

**Staff Retirement Plan is only available for internationals*

ASSIGN BENEFICIARIES

Instruction

15.1) Scroll to the percentages of each beneficiary found under the column “**Primary Percentage**”. Assign the desired percentage to your beneficiary. Always make sure the total is 100.

15.2) Click **Add**.

View

Enter IDB RP Plan Information

Select Plan

Plan Name
Staff Retirement Plan

Regular Contribution

Period: Monthly

Post-Tax Percentage: (Minimum 10.00 % - Maximum 10.00 %)

☒ Post-tax contributions start immediately

Designate Beneficiaries

Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)
Alimoon Hoosein	Spouse	80	0
Maqsood Hoosein	Child	20	0
Ibrahim Hoosein	Child	0	0
Ifran Ali	Child	0	0
Amjadally Inshanally	Father-in-Law	0	0
Ibrahim Hoosein	Other Beneficiary	0	0
Total		100	0

15.1)


Add Cancel

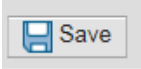
15.2)

ASSIGN BENEFICIARIES

Instruction

View

16.1) Click  .


16.2) Click  .

16.2)

Assign Beneficiary: Step 6 (Review and Save)

< Previous

Next >

 Save

1

2

3

4

5

6

Review and Save


Plans to be Changed

Plan Type	Sta...	Sta...	Plan Name	Option	Credit Amount	Coverage	Dependents...	Pre-Tax Costs	Post
Ret Life Ins	07/1...	Curr...	Retiree Life Insurance	Low Option		10,000.00 USD	Alimoon Hoosein (50%), Maqsood Hoosein (30%), Ibrahim Hoosein (20%)		
	07/1...	New	Retiree Life Insurance	Low Option		10,000.00 USD	Alimoon Hoosein (50%), Maqsood Hoosein (40%), Ibrahim Hoosein (10%)		

Unchanged Plans

Plan Type	Sta...	Sta...	Plan Name	Option	Credit Amount	Coverage	Dependents...	Pre-Tax Costs	Post
IDB RP	07/1...	Curr...	Staff Retirement Plan						

ASSIGN BENEFICIARIES

Instruction	View																																																		
<p>17) On the top of the page, you will see a message stating that your changes saved successfully. Verify if the summary of your benefits are correct.</p>	<div><div>Assign Beneficiary</div><div><div><div><div>✔</div><div>Data saved successfully</div></div></div><div><div>What do you want to do next?</div><div><div>Print Benefit Elections Summary</div><div>Go to Enrollment</div><div>Go to Benefits Participation Overview</div></div></div><div><div>Benefit Elections Summary</div><table><thead><tr><th>Plan Type</th><th>Starts On</th><th>Status</th><th>Plan Name</th><th>Option</th><th>Credit Amount</th><th>Coverage</th><th>Dependents/Beneficiaries</th><th>Pre-Tax Costs</th><th>Post-Tax Costs</th></tr></thead><tbody><tr><td>Med/Den/Vis/Rx</td><td>01/01/2016</td><td>Current</td><td>Retiree Intl Medical Plan</td><td>International</td><td></td><td>Marr +1-2 Children</td><td>Alimoon Hoosein, Maqsood Hoosein</td><td></td><td>107.7 Monthly</td></tr><tr><td>Ret Life Ins</td><td>07/13/2016</td><td>Current</td><td>Retiree Life Insurance</td><td>Low Option</td><td></td><td>10,000.00 USD</td><td>Alimoon Hoosein (50%), Maqsood Hoosein (40%), Ibrahim Hoosein (10%)</td><td></td><td></td></tr><tr><td>Ret Sp Life Ins</td><td>01/01/2016</td><td>Current</td><td>Retiree Spouse Life Insurance</td><td>Low Option</td><td></td><td>5,000.00 USD</td><td></td><td></td><td></td></tr><tr><td>IDB RP</td><td>04/06/2016</td><td>Current</td><td>Staff Retirement Plan</td><td></td><td></td><td></td><td>Alimoon Hoosein (80%), Maqsood Hoosein (20%)</td><td></td><td></td></tr></tbody></table></div></div></div>	Plan Type	Starts On	Status	Plan Name	Option	Credit Amount	Coverage	Dependents/Beneficiaries	Pre-Tax Costs	Post-Tax Costs	Med/Den/Vis/Rx	01/01/2016	Current	Retiree Intl Medical Plan	International		Marr +1-2 Children	Alimoon Hoosein, Maqsood Hoosein		107.7 Monthly	Ret Life Ins	07/13/2016	Current	Retiree Life Insurance	Low Option		10,000.00 USD	Alimoon Hoosein (50%), Maqsood Hoosein (40%), Ibrahim Hoosein (10%)			Ret Sp Life Ins	01/01/2016	Current	Retiree Spouse Life Insurance	Low Option		5,000.00 USD				IDB RP	04/06/2016	Current	Staff Retirement Plan				Alimoon Hoosein (80%), Maqsood Hoosein (20%)		
Plan Type	Starts On	Status	Plan Name	Option	Credit Amount	Coverage	Dependents/Beneficiaries	Pre-Tax Costs	Post-Tax Costs																																										
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IDB RP	04/06/2016	Current	Staff Retirement Plan				Alimoon Hoosein (80%), Maqsood Hoosein (20%)																																												
<p>18) To go back to the main menu, please close the window by clicking on the  icon.</p>	<div><div><div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div><div><div>Options</div><div>Close</div></div></div></div>																																																		

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

