

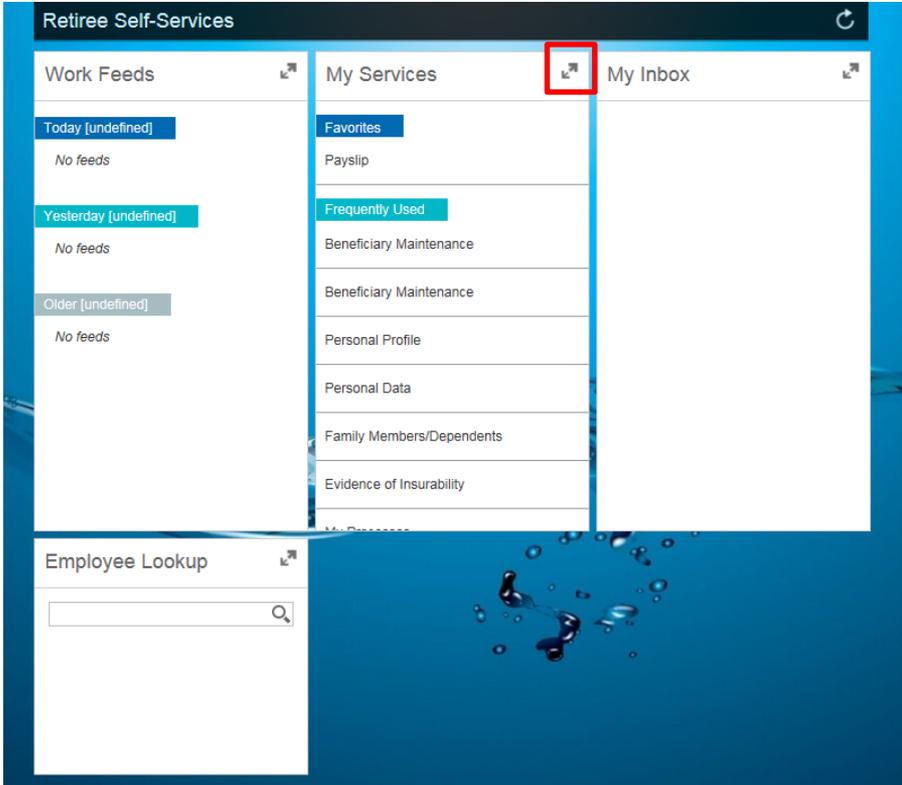
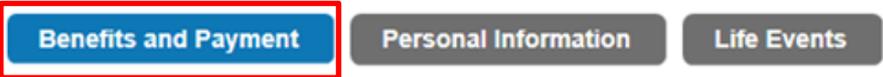
HOW TO ASSIGN BENEFICIARIES

IDB RETIREE SELF-SERVICES

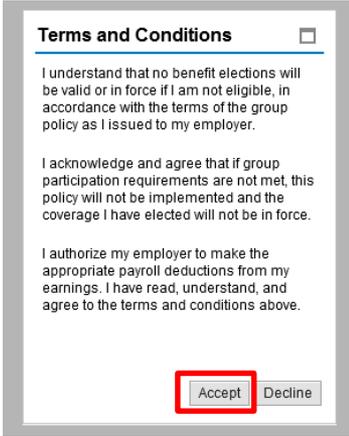
Objective

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

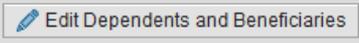
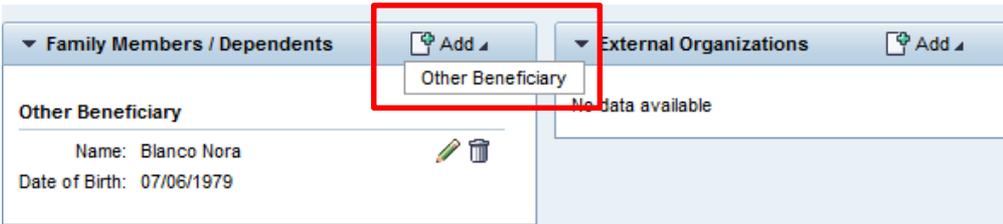
ASSIGN BENEFICIARIES

Instruction	View
<p>1) Go to My Services and  .</p>	
<p>2) Click  .</p>	

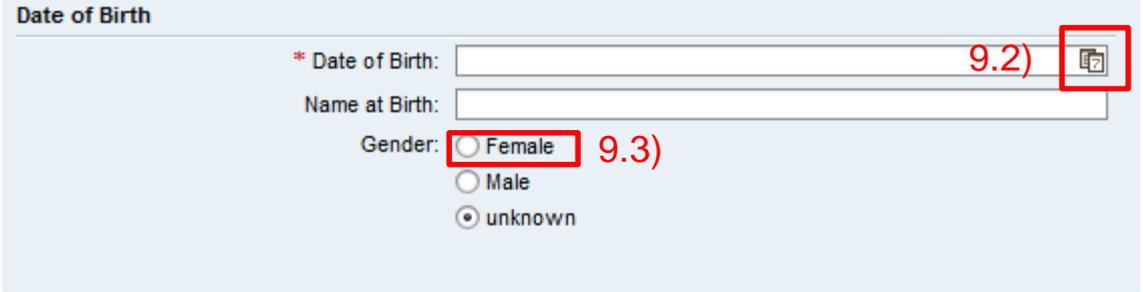
ASSIGN BENEFICIARIES

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>The screenshot shows a 'Benefits Overview' section with three links: 'Participation Overview', 'Beneficiary Maintenance', and 'Beneficiary Designation'. Each link has a star icon to its right. The 'Beneficiary Designation' link and its star icon are enclosed in a red rectangular box.</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>	 <p>The screenshot shows a 'Terms and Conditions' dialog box with a close button (X) in the top right corner. The text inside the dialog reads: 'I understand that no benefit elections will be valid or in force if I am not eligible, in accordance with the terms of the group policy as I issued to my employer.', 'I acknowledge and agree that if group participation requirements are not met, this policy will not be implemented and the coverage I have elected will not be in force.', and 'I authorize my employer to make the appropriate payroll deductions from my earnings. I have read, understand, and agree to the terms and conditions above.' At the bottom of the dialog, there are two buttons: 'Accept' and 'Decline'. The 'Accept' button is highlighted with a red rectangular box.</p>

ASSIGN BENEFICIARIES

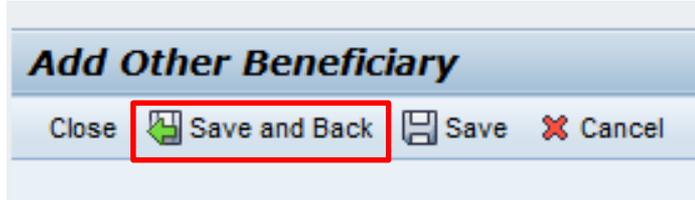
Instruction	View
<p>5) Click 2 to view the page of your beneficiaries.</p>	 <p>The screenshot shows the 'Assign Beneficiary: Step 1 (Personal Profile)' page. At the top, there are navigation buttons: '< Previous', 'Next >', 'Save', and 'Edit Beneficiaries'. Below this is a progress bar with six steps: 1. Personal Profile, 2. Dependents and Beneficiaries, 3. Benefits Summary, 4. Insurance Plans, 5. Savings Plans, and 6. Review and Save. Step 2 is highlighted with a red box.</p>
<p>6) Click </p>	 <p>The screenshot shows the 'Assign Beneficiary: Step 2 (Dependents and Beneficiaries)' page. At the top, there are navigation buttons: '< Previous', 'Next >', 'Save', and 'Edit Dependents and Beneficiaries'. Below this is a progress bar with four steps: 1. Personal Profile, 2. Dependents and Beneficiaries, 3. Benefits Summary, and 4. Insurance Plans. Step 2 is highlighted with a red box. Below the progress bar, there is a section titled 'Family Members / Dependents' with a sub-section 'Other Beneficiary' showing 'Name: Blanco Nora' and 'Date of Birth: 07/06/1979'.</p>
<p>7) Click  and select Other Beneficiary to add a beneficiary.</p>	 <p>The screenshot shows the 'Family Members / Dependents' section. There are two tabs: 'Family Members / Dependents' and 'External Organizations'. Under the 'Family Members / Dependents' tab, there is an 'Add' button with a dropdown menu. The dropdown menu is open, and 'Other Beneficiary' is selected and highlighted with a red box. Below the dropdown, there is a section titled 'Other Beneficiary' showing 'Name: Blanco Nora' and 'Date of Birth: 07/06/1979'. To the right of this section, there is a 'No Data available' message.</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>	 <p>Name</p> <p>8.2) * First name: <input type="text"/></p> <p>8.3) * Last name: <input type="text"/></p> <p>Title: <input type="text"/></p>
<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>	 <p>Date of Birth</p> <p>* Date of Birth: <input type="text"/> 9.2) </p> <p>Name at Birth: <input type="text"/></p> <p>Gender: <input checked="" type="radio"/> Female 9.3) <input type="radio"/> Male <input type="radio"/> unknown</p>

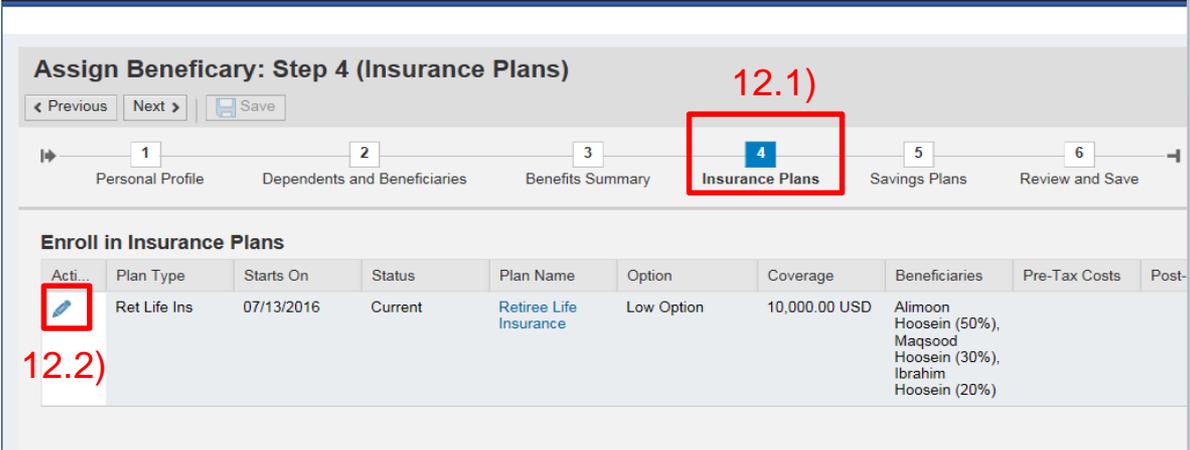
**Fields with asterisks are mandatory.*

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>The screenshot shows a form titled "Other Personal Data" with three dropdown menus: "* Nationality:", "Second Nationality:", and "Third Nationality:". The first dropdown menu is highlighted with a red rectangular box.</p>
<p>11) To save all the information, go to the top of the page and click “Save and Back”.</p>	 <p>The screenshot shows a dialog box titled "Add Other Beneficiary" with four buttons: "Close", "Save and Back", "Save", and "Cancel". The "Save and Back" button is highlighted with a red rectangular box.</p>

**Fields with asterisks are mandatory.*

ASSIGN BENEFICIARIES

Instruction	View																				
<p>12.1) Click “Insurance Plans”  to view the details of your “Retiree Life Insurance”.</p> <p>12.2) Click on the  icon.</p>	 <p>Assign Beneficiary: Step 4 (Insurance Plans)</p> <p>< Previous Next > Save</p> <p>1 Personal Profile 2 Dependents and Beneficiaries 3 Benefits Summary 4 Insurance Plans 5 Savings Plans 6 Review and Save</p> <p>Enroll in Insurance Plans</p> <table border="1"><thead><tr><th>Acti...</th><th>Plan Type</th><th>Starts On</th><th>Status</th><th>Plan Name</th><th>Option</th><th>Coverage</th><th>Beneficiaries</th><th>Pre-Tax Costs</th><th>Post-</th></tr></thead><tbody><tr><td></td><td>Ret Life Ins</td><td>07/13/2016</td><td>Current</td><td>Retiree Life Insurance</td><td>Low Option</td><td>10,000.00 USD</td><td>Alimoon Hoosein (50%), Maqsood Hoosein (30%), Ibrahim Hoosein (20%)</td><td></td><td></td></tr></tbody></table>	Acti...	Plan Type	Starts On	Status	Plan Name	Option	Coverage	Beneficiaries	Pre-Tax Costs	Post-		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%)		
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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 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		

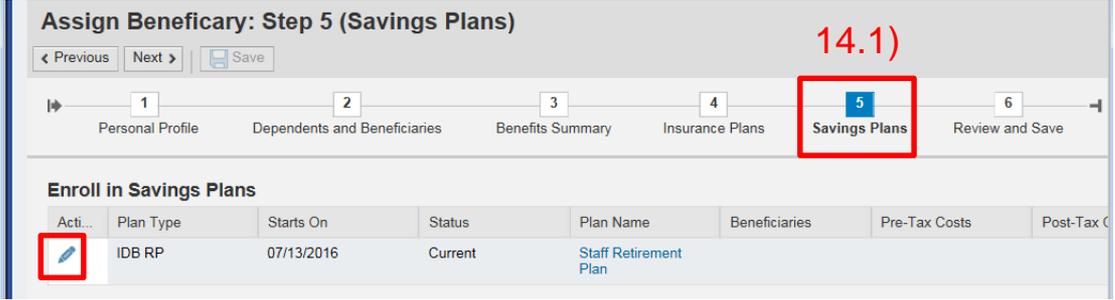
Designate Beneficiaries

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

13.1)

13.2)

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>	 <p>Assign Beneficiary: Step 5 (Savings Plans)</p> <p>14.1)</p> <p>1 Personal Profile 2 Dependents and Beneficiaries 3 Benefits Summary 4 Insurance Plans 5 Savings Plans 6 Review and Save</p> <p>Enroll in Savings Plans</p> <table border="1"><thead><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></thead><tbody><tr><td></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></tbody></table> <p>14.2)</p>	Acti...	Plan Type	Starts On	Status	Plan Name	Beneficiaries	Pre-Tax Costs	Post-Tax C		IDB RP	07/13/2016	Current	Staff Retirement Plan			
Acti...	Plan Type	Starts On	Status	Plan Name	Beneficiaries	Pre-Tax Costs	Post-Tax C										
	IDB RP	07/13/2016	Current	Staff Retirement Plan													

*Staff Retirement Plan is only available for internationals

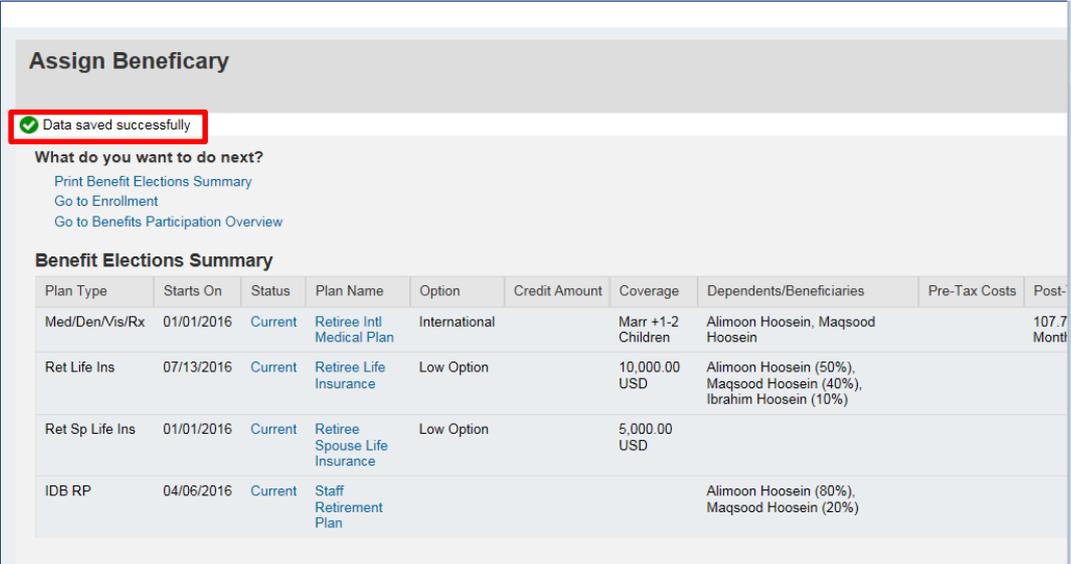
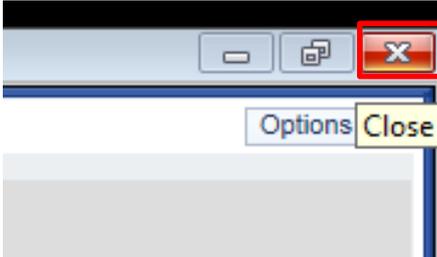
ASSIGN BENEFICIARIES

Instruction	View																																
<p>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.</p> <p>15.2) Click Add.</p>	<div data-bbox="730 307 1483 1053"><p>Enter IDB RP Plan Information □ ×</p><p>Select Plan</p><p>Plan Name</p><p>Staff Retirement Plan</p><p>Regular Contribution</p><p>Period: Monthly</p><p>Post-Tax Percentage: <input type="text" value="0.00"/> (Minimum 10.00 % - Maximum 10.00 %)</p><p><input checked="" type="checkbox"/> Post-tax contributions start immediately</p><p>Designate Beneficiaries</p><table border="1"><thead><tr><th>Name</th><th>Relationship</th><th>Primary Percentage (%)</th><th>Contingent Percentage (%)</th></tr></thead><tbody><tr><td>Alimoon Hoosein</td><td>Spouse</td><td>80</td><td>0</td></tr><tr><td>Maqsood Hoosein</td><td>Child</td><td>20</td><td>0</td></tr><tr><td>Ibrahim Hoosein</td><td>Child</td><td>0</td><td>0</td></tr><tr><td>Ifran Ali</td><td>Child</td><td>0</td><td>0</td></tr><tr><td>Amjadally Inshanally</td><td>Father-in-Law</td><td>0</td><td>0</td></tr><tr><td>Ibrahim Hoosein</td><td>Other Beneficiary</td><td>0</td><td>0</td></tr><tr><td>Total</td><td></td><td>100</td><td>0</td></tr></tbody></table><p style="text-align: right;">Add Cancel</p></div> <p style="text-align: right; color: red;">15.1)</p> <p style="text-align: right; color: red;">15.2)</p>	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
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ASSIGN BENEFICIARIES

Instruction	View																																																		
<p>16.1) Click  .</p>	<div data-bbox="600 287 1746 989"> <p style="text-align: center; color: red; font-weight: bold;">16.2)</p> <p style="text-align: right; color: red; font-weight: bold;">16.1)</p> <p style="text-align: center;">Assign Beneficiary: Step 6 (Review and Save)</p> <p> < Previous Next >  </p> <p> 1 2 3 4 5 6 </p> <p style="text-align: center;"> Personal Profile Dependents and Beneficiaries Benefits Summary Insurance Plans Savings Plans Review and Save </p> <p>Plans to be Changed</p> <table border="1"> <thead> <tr> <th>Plan Type</th> <th>Sta...</th> <th>Sta...</th> <th>Plan Name</th> <th>Option</th> <th>Credit Amount</th> <th>Coverage</th> <th>Dependents...</th> <th>Pre-Tax Costs</th> <th>Post</th> </tr> </thead> <tbody> <tr> <td>Ret Life Ins</td> <td>07/1...</td> <td>Curr...</td> <td>Retiree Life Insurance</td> <td>Low Option</td> <td></td> <td>10,000.00 USD</td> <td>Alimoon Hoosein (50%), Maqsood Hoosein (30%), Ibrahim Hoosein (20%)</td> <td></td> <td></td> </tr> <tr> <td></td> <td>07/1...</td> <td>New</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> </tbody> </table> <p>Unchanged Plans</p> <table border="1"> <thead> <tr> <th>Plan Type</th> <th>Sta...</th> <th>Sta...</th> <th>Plan Name</th> <th>Option</th> <th>Credit Amount</th> <th>Coverage</th> <th>Dependents...</th> <th>Pre-Tax Costs</th> <th>Post</th> </tr> </thead> <tbody> <tr> <td>IDB RP</td> <td>07/1...</td> <td>Curr...</td> <td>Staff Retirement Plan</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div>	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%)			Plan Type	Sta...	Sta...	Plan Name	Option	Credit Amount	Coverage	Dependents...	Pre-Tax Costs	Post	IDB RP	07/1...	Curr...	Staff Retirement Plan						
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ASSIGN BENEFICIARIES

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<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>	 <p>Assign Beneficiary</p> <p>✔ Data saved successfully</p> <p>What do you want to do next?</p> <ul style="list-style-type: none">Print Benefit Elections SummaryGo to EnrollmentGo to Benefits Participation Overview <p>Benefit Elections Summary</p> <table border="1"><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 Month</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>10,000.00 USD</td><td></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>5,000.00 USD</td><td></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>	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 Month	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%)		
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<p>18) To go back to the main menu, please close the window by clicking on the  icon.</p>	 <p>The screenshot shows a window with a standard Windows-style title bar. The 'Close' button (marked with an 'X') is highlighted with a red box. Below the title bar, there are two buttons: 'Options' and 'Close'.</p>																																																		

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

