

# **DESIGNAR BENEFICIARIOS**

BID RETIREE SELF-SERVICES

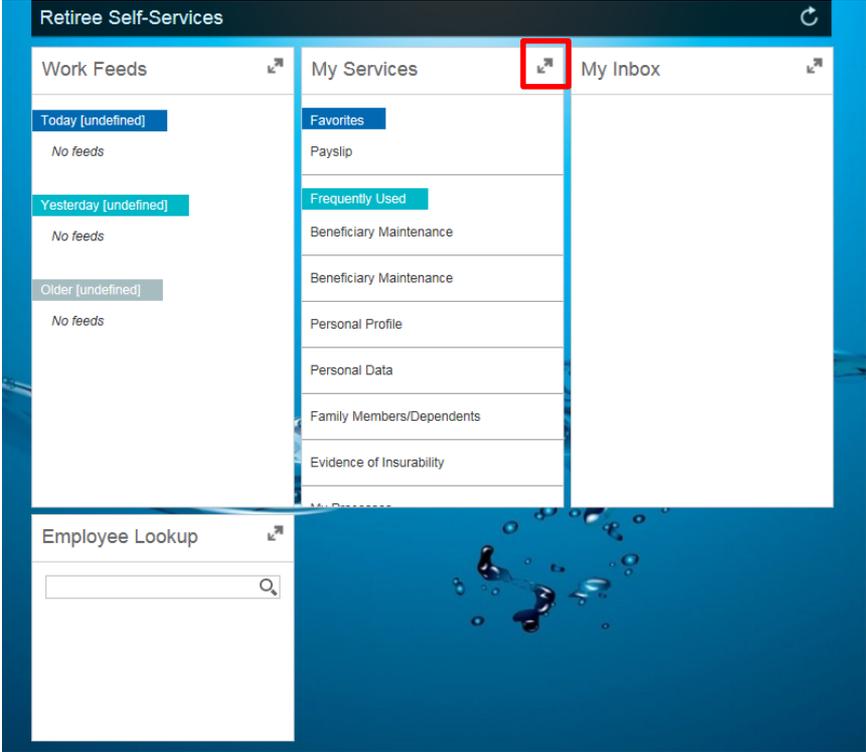
Guía de uso para Mac/Apple



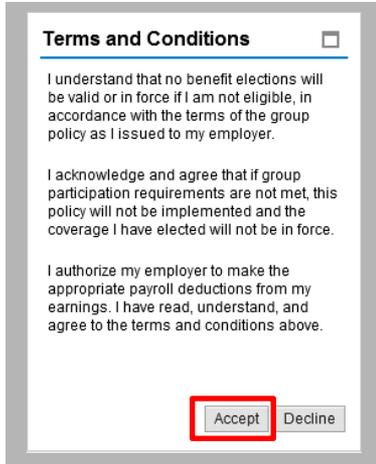
## **Objetivo**

- ✓ Designar beneficiarios para el seguro de vida del jubilado, a través del Retiree Self-Services.

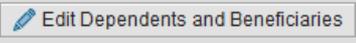
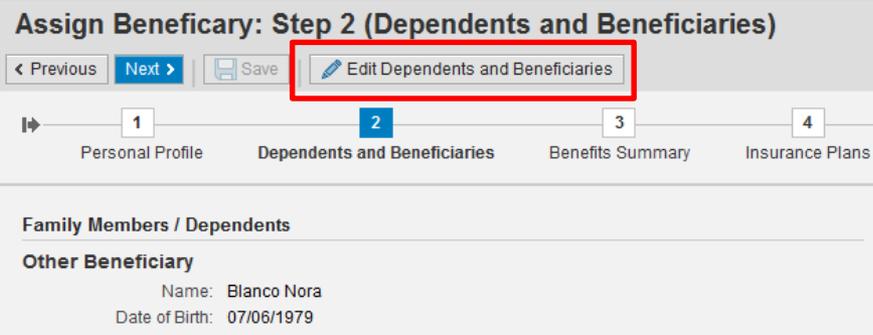
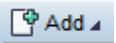
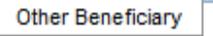
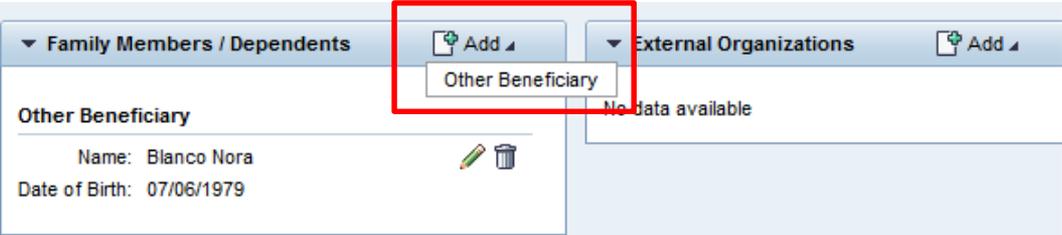
# DESIGNAR BENEFICIARIOS

Instrucción	Vista
1) Ir a <b>My Services</b> y hacer clic en  .	
2) Hacer clic en 	

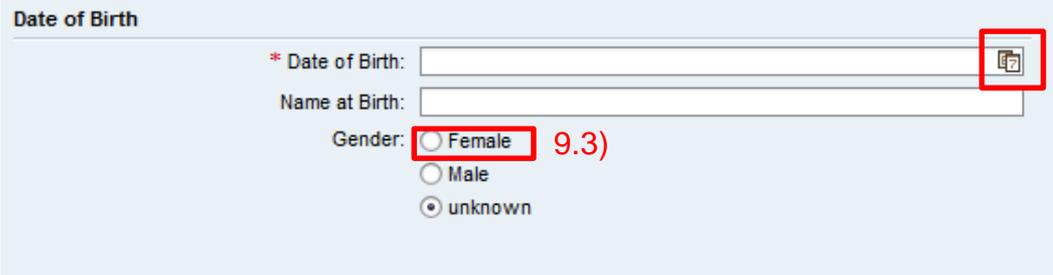
# DESIGNAR BENEFICIARIOS

Instrucción	Vista
<p>3) Ir a “Benefits Overview” y hacer clic en “Beneficiary Designation”.</p> <p><i>(Si lo desea, puede hacer clic sobre la estrella ★ para salvar el acceso a “Beneficiary Designation” entre sus Favoritos. Los Favoritos son listados en la página principal de su Retiree Self-Service, bajo “My Services”).</i></p>	 <p>The screenshot shows a 'Benefits Overview' page with three menu items: 'Participation Overview', 'Beneficiary Maintenance', and 'Beneficiary Designation'. Each item has a star icon to its right. The 'Beneficiary Designation' item is highlighted with a red rectangular box.</p>
<p>4) Obtendrá un mensaje que contiene los Términos y Condiciones de la designación de beneficiarios. Leer los términos y condiciones y hacer clic en <input type="button" value="Accept"/> para continuar.</p>	 <p>The screenshot shows a 'Terms and Conditions' page with a checkbox at the top right. Below the title, there are three paragraphs of text. At the bottom, there are two buttons: 'Accept' and 'Decline'. The 'Accept' button is highlighted with a red rectangular box.</p>

# DESIGNAR BENEFICIARIOS

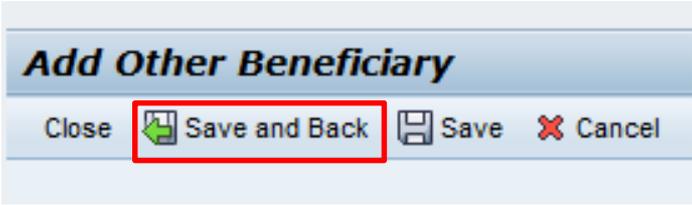
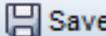
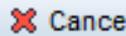
Instrucción	Vista
<p>5) Hacer clic en “<b>Dependents and Beneficiaries</b>” <sup>2</sup> para ver la página de sus beneficiarios.</p>	 <p><b>Assign Beneficiary: Step 1 (Personal Profile)</b></p> <p>&lt; Previous Next &gt; Save Edit Beneficiaries</p> <p>1 Personal Profile 2 Dependents and Beneficiaries 3 Benefits Summary 4 Insurance Plans 5 Savings Plans 6 Review and Save</p>
<p>6) Hacer clic en </p>	 <p><b>Assign Beneficiary: Step 2 (Dependents and Beneficiaries)</b></p> <p>&lt; Previous Next &gt; Save Edit Dependents and Beneficiaries</p> <p>1 Personal Profile 2 Dependents and Beneficiaries 3 Benefits Summary 4 Insurance Plans</p> <p><b>Family Members / Dependents</b></p> <p><b>Other Beneficiary</b></p> <p>Name: Blanco Nora Date of Birth: 07/06/1979</p>
<p>7) Hacer clic en  y seleccione  para agregar un beneficiario.</p>	 <p>Family Members / Dependents External Organizations</p> <p>Other Beneficiary</p> <p>Name: Blanco Nora Date of Birth: 07/06/1979</p> <p>No data available</p>

# DESIGNAR BENEFICIARIOS

Instrucción	Vista
<p>8.1) Ir a “Name”.</p> <p>8.2) Hacer clic en “<b>First Name</b>”* y escribir el nombre del beneficiario.</p> <p>8.3) Hacer clic en el campo “<b>Last Name</b>”* y escribir el apellido del beneficiario.</p>	
<p>9.1) Ir a “Date of Birth”*.</p> <p>9.2) Hacer clic en el calendario  del campo “<b>Date of Birth</b>” y seleccionar la fecha de nacimiento del beneficiario.</p> <p>9.3) Seleccionar el género del beneficiario.</p>	

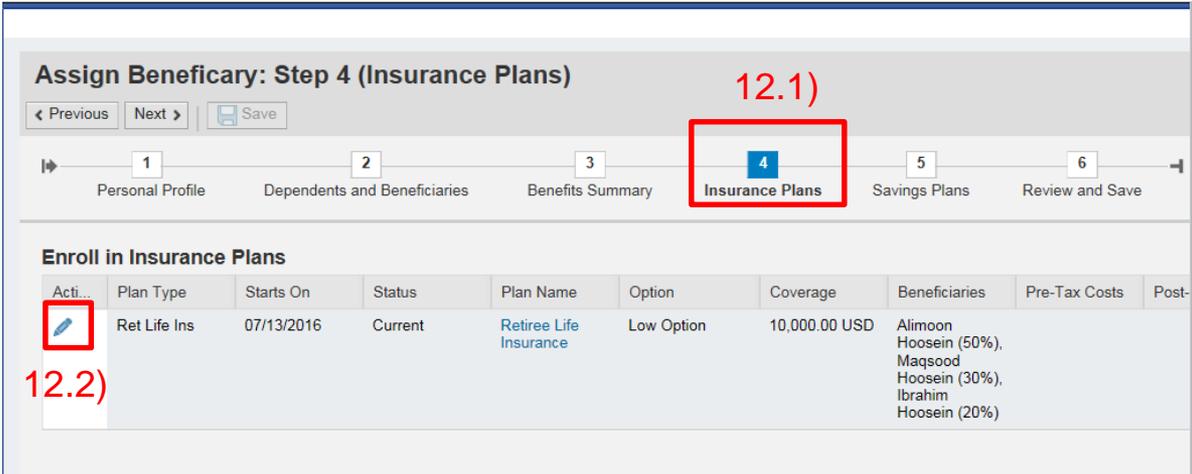
\*Los campos con asteriscos son obligatorios.

## DESIGNAR BENEFICIARIOS

Instrucción	Vista
<p>10.1) Ir a “Other Personal Data”.</p> <p>10.2) Desplegar el menú de  “Nationality”* y seleccionar una nacionalidad para su beneficiario.</p>	 <p>Other Personal Data</p> <p>* Nationality: <input type="text"/></p> <p>Second Nationality: <input type="text"/></p> <p>Third Nationality: <input type="text"/></p>
<p>11) Para finalizar, ir a la parte superior de la pantalla y hacer clic “Save and Back”.</p>	 <p><b>Add Other Beneficiary</b></p> <p>Close  Save and Back  Save  Cancel</p>

\*Los campos con asteriscos son obligatorios.

# DESIGNAR BENEFICIARIOS

Instrucción	Vista																				
<p>12.1) Hacer clic en “Insurance Plans”  para ver el detalle de su “Retiree Life Insurance”.</p> <p>12.2) Hacer clic en  .</p>	 <p><b>Assign Beneficiary: Step 4 (Insurance Plans)</b></p> <p>12.1</p> <p>1 Personal Profile   2 Dependents and Beneficiaries   3 Benefits Summary   <b>4 Insurance Plans</b>   5 Savings Plans   6 Review and Save</p> <p><b>Enroll in Insurance Plans</b></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> 12.2</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-	 12.2	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%)		
Acti...	Plan Type	Starts On	Status	Plan Name	Option	Coverage	Beneficiaries	Pre-Tax Costs	Post-												
 12.2	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%)														

# DESIGNAR BENEFICIARIOS

## Instrucción

13.1) Hacer clic sobre los porcentajes de asignación del beneficio bajo la columna “**Primary Percentage**” y designe el porcentaje deseado a su beneficiario, procurando siempre que el total arroje 100.

13.2) Hacer clic en  .

## Vista

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		

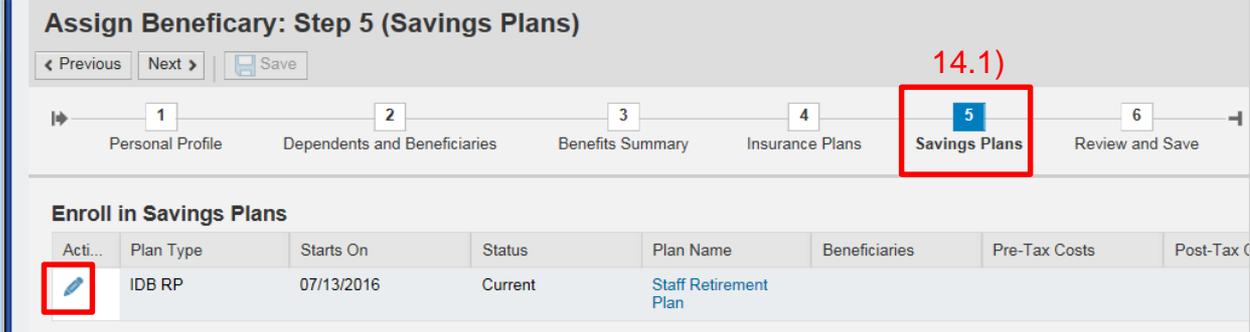
Designate Beneficiaries

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

13.1)

13.2)

# DESIGNAR BENEFICIARIOS

Instrucción	Vista
<p>14.1) Hacer clic en “Savings Plans”  para ver el detalle de su “Staff Retirement Plan”*.</p> <p>14.2) Hacer clic en  .</p>	 <p>14.1)</p> <p>14.2)</p>

\*El Staff Retirement Plan está disponible solo para internacionales.

# DESIGNAR BENEFICIARIOS

## Instrucción

15.1) Hacer clic sobre los porcentajes de asignación del beneficio bajo la columna “**Primary Percentage**” y designe el porcentaje deseado a su beneficiario, procurando siempre que el total arroje 100.

15.2) Hacer clic en .

## Vista

**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**

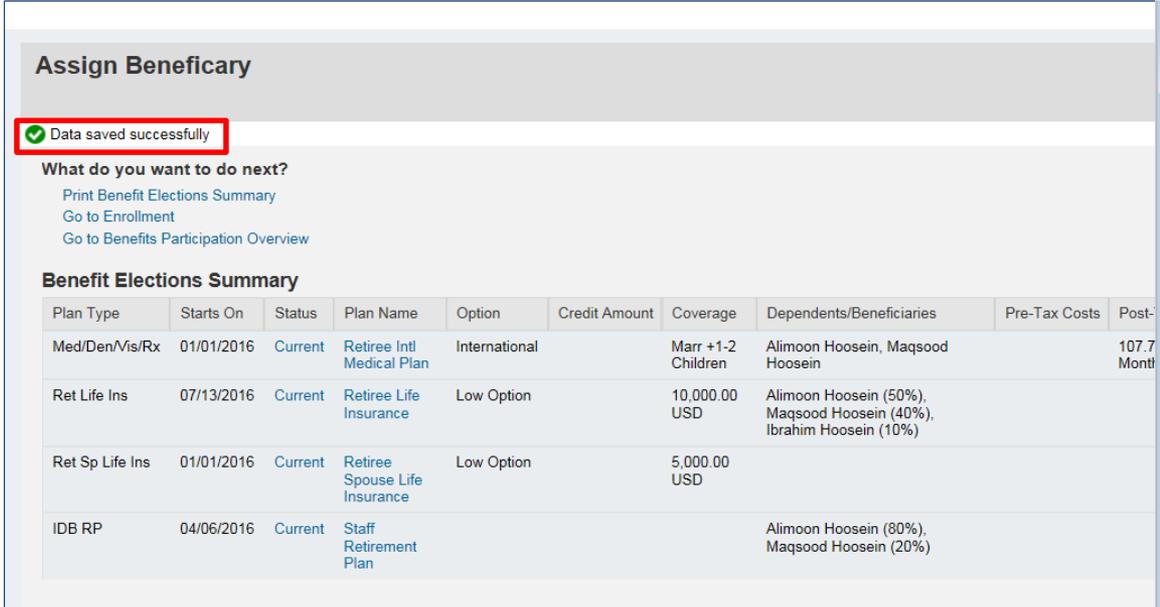
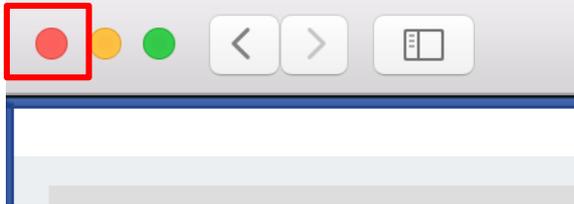
Name	Relationship	Primary Percentage (%)	Contingent Percentage (%)
Alimoon Hoosein	Spouse	80	0
Maqsood Hoosein	Child	20	0
Ibrahim Hoosein	Child	0	0
Ifraan Ali	Child	0	0
Amjadally Inshanally	Father-in-Law	0	0
Ibrahim Hoosein	Other Beneficiary	0	0
Total		100	0

15.2)  

# DESIGNAR BENEFICIARIOS

Instrucción	Vista																																																		
<p>16.1) Hacer clic en </p> <p>16.2) Hacer clic en </p>	<p><b>Assign Beneficiary: Step 6 (Review and Save)</b></p> <p>16.1)</p> <p>16.2)</p> <p>1 Personal Profile   2 Dependents and Beneficiaries   3 Benefits Summary   4 Insurance Plans   5 Savings Plans   6 <b>Review and Save</b></p> <p><b>Plans to be Changed</b></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><b>Unchanged Plans</b></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>	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						
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																																																

# DESIGNAR BENEFICIARIOS

Instrucción	Vista																																																		
<p>17) En la parte superior verá el mensaje de que sus cambios han sido guardada exitosamente. Verificar que el resumen de sus beneficios es correcto.</p>	 <p><b>Assign Beneficiary</b></p> <p>✔ Data saved successfully</p> <p>What do you want to do next?</p> <ul style="list-style-type: none"><li><a href="#">Print Benefit Elections Summary</a></li><li><a href="#">Go to Enrollment</a></li><li><a href="#">Go to Benefits Participation Overview</a></li></ul> <p><b>Benefit Elections Summary</b></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></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>	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%)		
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%)																																												
<p>18) Para regresar al menú principal, cerrar la ventana haciendo clic en .</p>																																																			

¿Necesita ayuda para acceder y navegar en su Retiree Self-Services?

**Más tutoriales y guías de uso en:**

[www.iadb.org/RetireeSelfServices](http://www.iadb.org/RetireeSelfServices)

**Browsers recomendados:**

Internet Explorer para PC/Windows

Safari para Mac/Apple

