

# **DESIGNAR BENEFICIARIOS**

BID RETIREE SELF-SERVICES


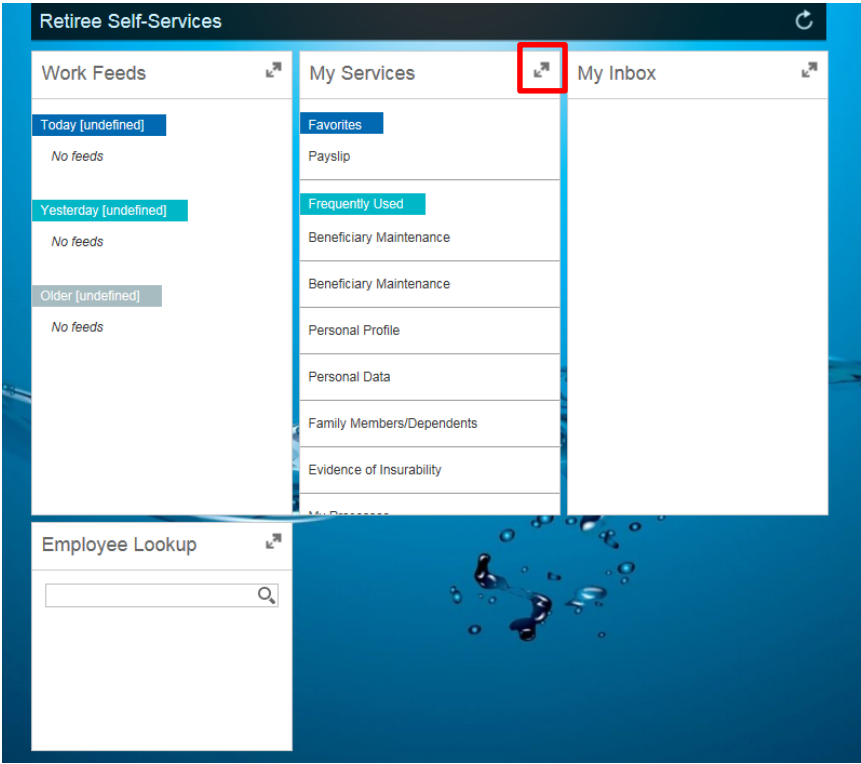

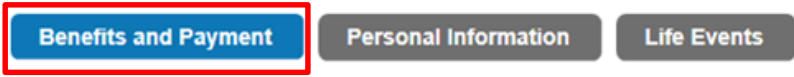
Guía de uso para Mac/Apple




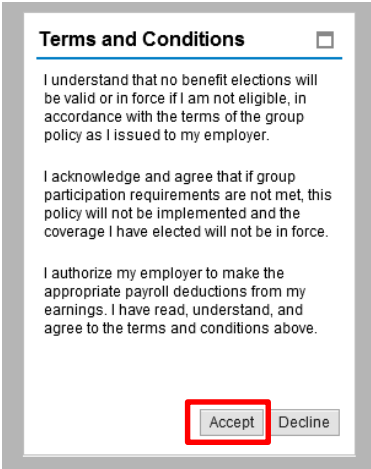
## **Objetivo**

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

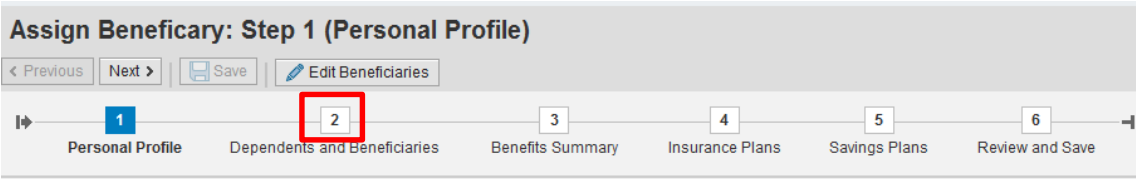
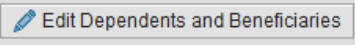
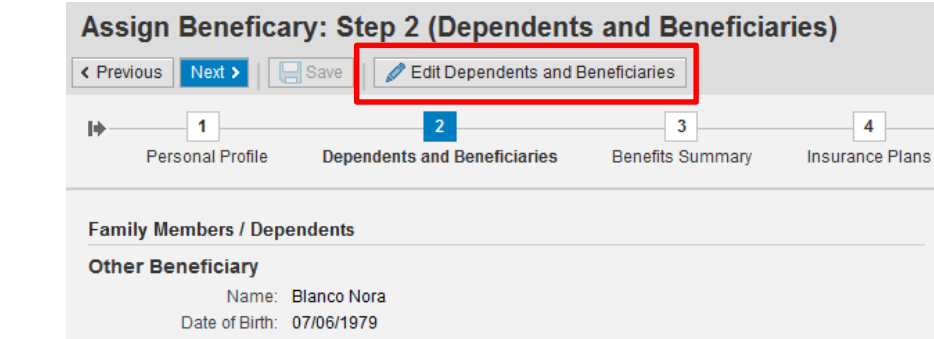

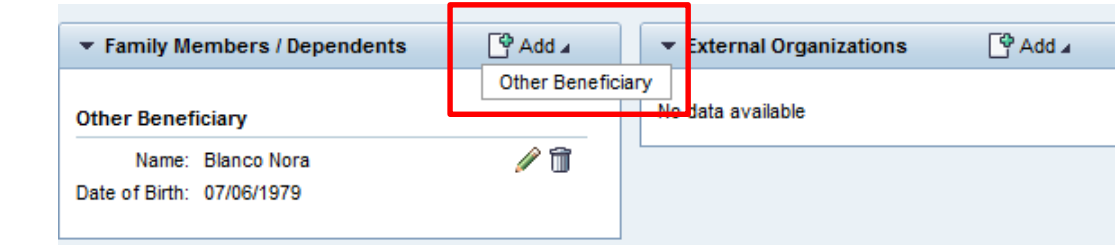
# DESIGNAR BENEFICIARIOS

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

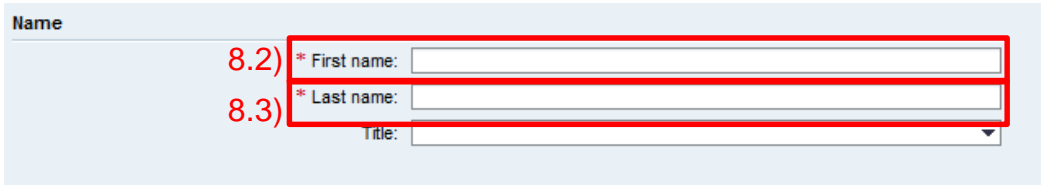
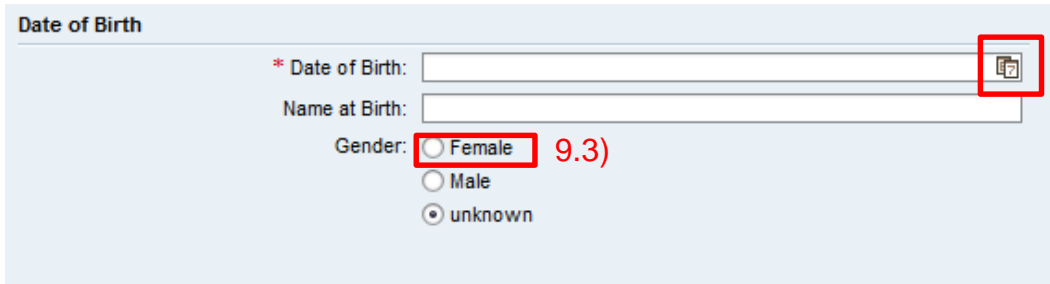
# DESIGNAR BENEFICIARIOS

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>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>	

# DESIGNAR BENEFICIARIOS

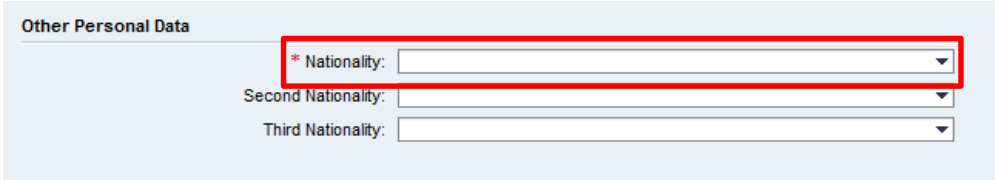
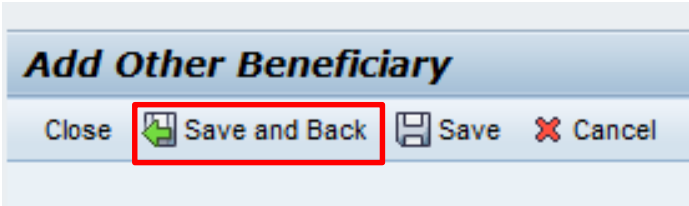
Instrucción	Vista
<p>5) Hacer clic en “<b>Dependents and Beneficiaries</b>” <span style="border: 1px solid black; padding: 0 2px;">2</span> para ver la página de sus beneficiarios.</p>	 <p><b>Assign Beneficiary: Step 1 (Personal Profile)</b></p> <p>&lt; Previous   Next &gt;   Save   Edit Beneficiaries</p> <p>1 Personal Profile   <b>2 Dependents and Beneficiaries</b>   3 Benefits Summary   4 Insurance Plans   5 Savings Plans   6 Review and Save</p>
<p>6) Hacer clic en</p> <p></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   <b>2 Dependents and Beneficiaries</b>   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 <span style="border: 1px solid black; padding: 2px;">Other Beneficiary</span> para agregar un beneficiario.</p>	 <p><b>Family Members / Dependents</b>   Add   External Organizations   Add</p> <p><b>Other Beneficiary</b></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>The screenshot shows a form titled "Other Personal Data". It contains three dropdown menus: "* Nationality:", "Second Nationality:", and "Third Nationality:". The first dropdown menu, labeled "* Nationality:", is highlighted with a red rectangular box.</p>
<p>11) Para finalizar, ir a la parte superior de la pantalla y hacer clic “Save and Back”.</p>	 <p>The screenshot shows a dialog box titled "Add Other Beneficiary". At the bottom, there are four buttons: "Close", "Save and Back", "Save", and "Cancel". The "Save and Back" button, which features a green arrow icon, is highlighted with a red rectangular box.</p>

\*Los campos con asteriscos son obligatorios.

# DESIGNAR BENEFICIARIOS

## Instrucción

12.1) Hacer clic en “Insurance Plans”  para ver el detalle de su “Retiree Life Insurance”.

12.2) Hacer clic en  .

## Vista

### Assign Beneficiary: Step 4 (Insurance Plans)

[< Previous](#) [Next >](#) [Save](#)

1

Personal Profile

2

Dependents and Beneficiaries

3

Benefits Summary

4

**Insurance Plans**


5

Savings Plans

6

Review and Save

#### Enroll in Insurance Plans

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%)		



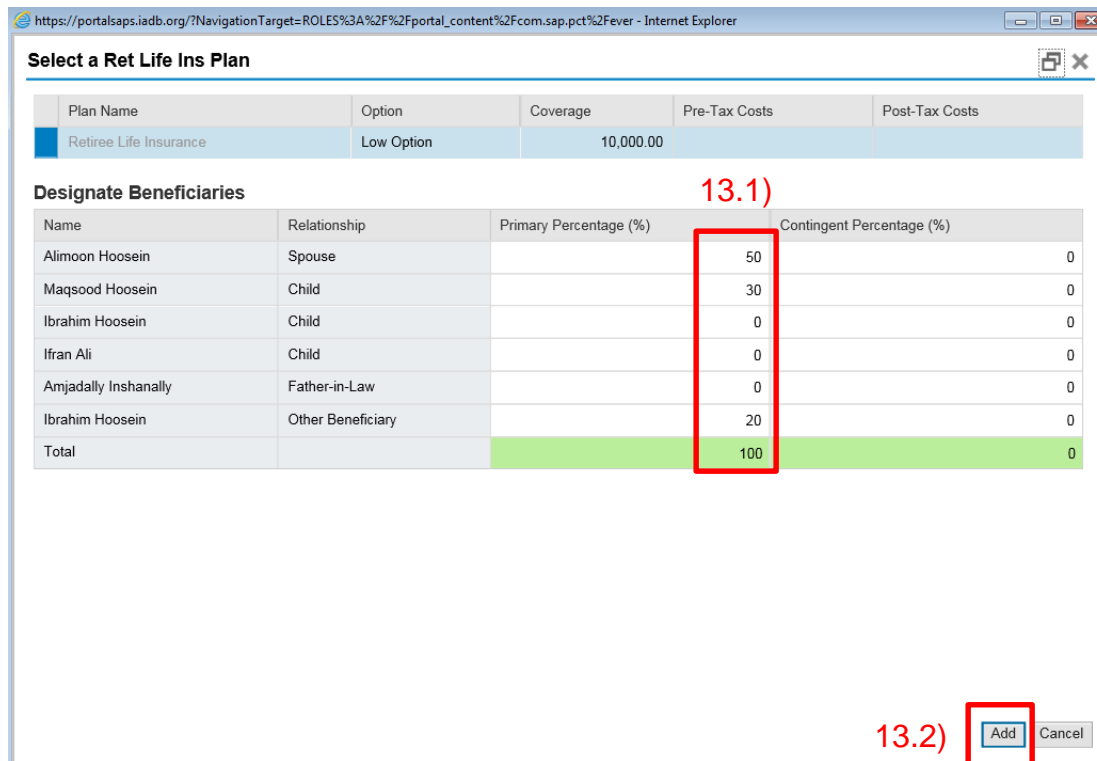
# DESIGNAR BENEFICIARIOS

## 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
Ifra Ali	Child	0	0
Amjadally Inshanally	Father-in-Law	0	0
Ibrahim Hoosein	Other Beneficiary	20	0
Total		100	0

13.1)

13.2) Add Cancel

# 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>	<div><div>Assign Beneficiary: Step 5 (Savings Plans)</div><div><div>&lt; Previous</div><div>Next &gt;</div><div> Save</div></div><div><div>1</div><div>2</div><div>3</div><div>4</div><div><div>5</div><div>Savings Plans</div></div><div>6</div></div><div><div>Personal Profile</div><div>Dependents and Beneficiaries</div><div>Benefits Summary</div><div>Insurance Plans</div><div>Review and Save</div></div></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></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		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													

*\*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
Ifra Ali	Child	0	0
Amjadally Inshanally	Father-in-Law	0	0
Ibrahim Hoosein	Other Beneficiary	0	0
Total		100	0

15.2)  Cancel

# DESIGNAR BENEFICIARIOS

Instrucción

16.1) Hacer clic en 


16.2) Hacer clic en 

Vista

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						

# 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>	<div><div>Assign Beneficiary</div><div><div>✔ Data saved successfully</div><div>What do you want to do next?</div><div><a href="#">Print Benefit Elections Summary</a> <a href="#">Go to Enrollment</a> <a href="#">Go to Benefits Participation Overview</a></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>	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%)		
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<p>18) Para regresar al menú principal, cerrar la ventana haciendo clic en .</p>	<div><div><div></div><div></div><div></div><div>&lt;</div><div>&gt;</div><div></div></div><div></div></div>																																																		

¿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

