UPDATING LIFE INSURANCE BENEFICIARITES

1. Log in to e-CHRIS Self Service hr.phoenix.gov, if you need assistance with password reset contact the Help Desk at 602.534.4357.

2. Click the BENEFITS tile, then locate BENEFITS SUMMARY on the left side of the screen.

3. The next screen will show you a complete list of your benefits. You will see a tile for each of the benefits offered and all life insurances policies (City sponsored: Basic Life, Basic AD&D, Occupational AD&D and Commuter, and employee elected Optional Life Employee. You must select beneficiaries for each individual policy *except for Optional Life Spouse and Optional Life Dep Child (you are automatically the beneficiary*).

4. Click on each life insurance tile individually to review your beneficiary allocations for that plan. The next screen will show you who your current beneficiaries are, and the percentage of life insurance allocated to them.

5. On this screen you may also add new beneficiaries by clicking on ADD BENEFICARY

6. After saving new beneficiary information, you will automatically be returned to that life insurance page. The new person(s) will now be listed, and you may allocate your Life Insurance benefits.

7. If you want to make a change, click on the UPDATE BENEFICARY DESIGNATION button found on the bottom center of the table. A window will pop up and will show you a list of all beneficiaries you have on record in eChris. You may change the percentage amount for any beneficiary listed. Keep in mind that primary and secondary totals must equal 100% each. Enter the whole number only (example, 50, do not enter 50% or 50.33.) The same person cannot be a primary and secondary beneficiary for the same policy. **You *CANNOT* delete someone's name and/or information (this is your history). You can, however, change their percent to zero.**

8. Once you have changed your allocations, click on SAVE. This will take you back to the life insurance page where you will see your current beneficiary(ies) listed.

9. At the top right-hand side of the window, click on "×." This will take you back to the list of enrollment types

10. Locate the next Life Insurance policy, click on the REVIEW button across from the next life insurance and **repeat steps 5 and 8-10.** You will not need to re-enter personal information. The person(s) you just added will now be listed.

LIFE BENEFICIARIES FOR A TRUST– INSTRUCTION

If you are adding a trust as your beneficiary, you will add it like you a person. For the first name, enter the name of your trust. The last name, enter “Trust”. For the date of birth, you will enter the date in which the trust was established.

The following may require updating of your beneficiaries:

Nationwide Beneficiary Form – 401a, 457 and PEHP (All Employees)
https://www.nrsservicecenter.com/content/media/retail/pdfs/PhoenixDCP/PHX_ben.pdf (return form to Nationwide, address on form)

COPERS Beneficiary Form (General City Employees)
http://phoenix.gov/AGENCY/PHXCOPER/dobactive.pdf (Return form to COPERS, City Hall, 10th Floor, 200 W. Washington St., Phoenix, AZ 85003)

PSPRS Beneficiary Form (Fire and Sworn Police Employees)
http://www.psprs.com/sys_psprs/Forms/PS%202010-11/Common%20Forms%202010/FORM%208%20-%20Beneficiary%20Designation%20Form.pdf
(Return form to COPERS, City Hall, 10th Floor, 200 W. Washington St., Phoenix, AZ 85003) THEY WILL FORWARD TO PUBLIC SAFETY RETIREMENT.