
Updating Warrant Designee and Life Insurance Beneficiaries in PeopleSoft

What Is Warrant and Benefit Designation?

Employees are able to designate a beneficiary for not only Life Insurance, but for final paycheck balances, or “warrant and benefits.” In the event of death, a **Warrant and Benefits Beneficiary** would receive an employee’s final paycheck balance, should there be any funds to pass on.

Warrant and Benefits is an additional benefits designation, separate from Life Insurance, so it is very important that employees make a decision within both tabs, under the **Benefit Details** tile.

How Do I Add Dependents/Beneficiaries to HCM?

1. Log into **hcm.ccsd.net** using your **Active Directory (AD)** credentials.
2. From the Employee Self Service dashboard, click the **Benefit Details** tile.
3. Select **Dependent/Beneficiary Info** from the panel on the left.
4. Any existing dependents or beneficiaries that you have already added will display. To add a new one, click **Add Individual**.


5. On the form that follows, click the **Add Name** button to enter the individual’s name. Click **Done** when finished.


The screenshot shows a 'Name' form with the following fields and values:


Name Format	English
Name Prefix	
*First Name	Elliot
Middle Name	
*Last Name	Stablef
Name Suffix	
Display Name	Elliot
Formal Name	Elliot
Name	,Elliot

6. Fill out all required information (including Gender, Relationship to Employee, etc.) on the form.

Personal Information

Date of Birth 



*Gender 



*Relationship to Employee 



Dependent



Beneficiary

* **NOTE:** If any of the individual's **statuses** (Marital Status, Student, or Disabled) have changed, please contact the Benefits Department for assistance with modifying. Otherwise, this could cause an error with your Health Insurance screen.

*Marital Status  As of 

*Student  As of 

*Disabled  As of 

*Smoker  As of 

7. The **Address** will default to your home address. Click the address bar to update this if needed.

Address



8. Click the **Add National ID** button to add the individual’s Social Security Number (by choosing **United States** as the Country and **Social Security Number** as the National ID Type). Click **Done** when finished.

* **NOTE:** This information is used by the Benefits Department for benefits coverage purposes *only*.

9. After you have filled out all required information, click **Save**. The individual will now display on your **Dependent/Beneficiary Info** page and be available for plan coverage/warrant designation. You will notice that the system automatically places a checkmark in both the **Beneficiary** and **Dependent** column next to the individual’s name. However, this does **not** mean that the individual is an **active** dependent/beneficiary. This simply indicates that the individual is **eligible** to be covered as a dependent/beneficiary if you choose to do so.

Dependent/Beneficiary Info			
Add Individual			
Name	Relationship	Beneficiary	Dependent
Elliot Stabler	Spouse	✓	✓

NOTE: Once added, a dependent or beneficiary **cannot** be removed from the HCM system. However, this does *not* necessarily mean that they are covered by your benefits plans and/or assigned as a warrant designee. Active coverage/designee status is determined by you, the employee.

How Do I Add or Edit My Life Insurance Beneficiaries?

1. Log into **hcm.ccsd.net** using your **Active Directory (AD)** credentials.
2. From the Employee Self Service dashboard, click the **Benefit Details** tile.

3. You are brought to your **Benefits Summary** page. Click the **Life** row that appears in the Benefits Table.

Type of Benefit	Plan Description	Coverage or Participation
Health	PPO	Employee Only >
Life	Life Insurance	\$50000 >
PERS	PERS	Participating

4. Any individuals that are actively covered by your life insurance plan will display under **Covered Beneficiaries**. To modify (add or remove) individuals, click the **Edit** button.

Covered Beneficiaries

You do not have any beneficiaries as of the date shown on this page. Select Edit if you would like to change or add beneficiaries

5. On the page that follows, you will see that any previously added individuals are available for selection. Click the **checkbox** next to the name of the desired individual(s) to assign them as beneficiaries.

* **NOTE:** You can have more than one life insurance beneficiary, and therefore can select multiple individuals.

7. After clicking the checkbox, enter the desired **Primary** and **Secondary Allocation** (as a percentage) next to their name.

Allocation Details						
	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input checked="" type="checkbox"/>	Elliot Stabler	Spouse			100	

* **NOTE:** When entering allocations as percentages, you must ensure that the percentages entered total **100 percent**.

Example:

Allocation Details						
	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input checked="" type="checkbox"/>	Elliot Stabler	Spouse			40	
<input checked="" type="checkbox"/>	Kathleen Stabler	Child			60	

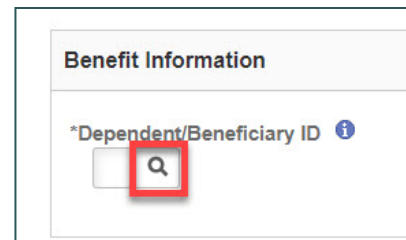
8. If desired, click the **Update Totals** button to view the total of the allocations entered for each selected beneficiary.

9. Click **Save** when finished. The selected individuals will now be identified as covered beneficiaries in your life insurance plan.

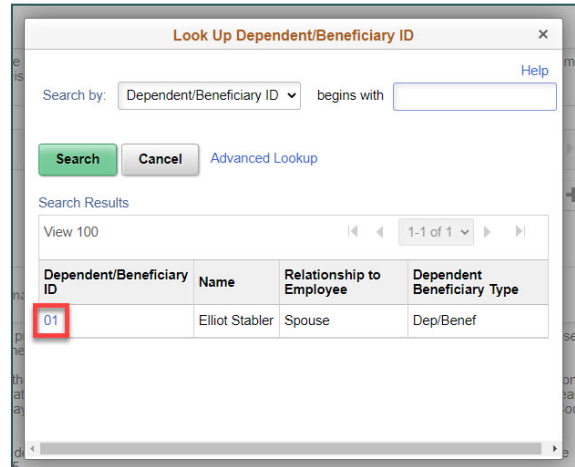
* **NOTE:** Although there is an **Add Beneficiary** button on this page, it is **not** recommended that this button be used to add new beneficiaries. Instead, please use the **Dependent/Beneficiary Info** option within the **Benefit Details** tile to add new individuals to the HCM system. See [How Do I Add Dependents/Beneficiaries to HCM?](#) for detailed instructions.

How Do I Add or Edit My Warrant Designees?

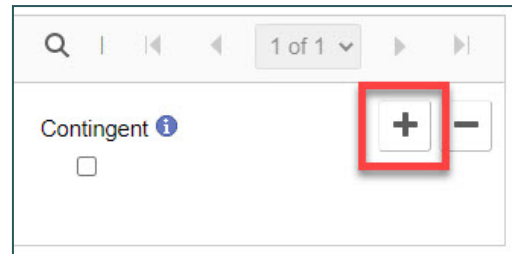
1. Log into **hcm.ccsd.net** using your **Active Directory (AD)** credentials.
2. From the Employee Self Service dashboard, click the **Benefit Details** tile.
3. Select **Warrant & Benefits Designation** from the panel on the left.
4. In the ***Dependent/Beneficiary ID** field, click the **magnifying glass** icon.



5. In the window that appears, you will see a list of all beneficiaries/dependents that you have previously added to your HCM account. Click the **Dependent/Beneficiary ID number** next to the desired individual's name to select them.



6. Just as with assigning life insurance beneficiaries, you can assign multiple designees in the Warrant and Benefits Designation. To do this, click the **plus** button to add a new row, and repeat **Step 5** to add another designee.



* **NOTE:** Use the plus button available in the **Benefit Information** area, *not* the plus button that appears at the top of the page.

7. Once all desired designees have been added, enter the desired **Percent of Benefit** for each designee.

* **NOTE:** Ensure that all percentages entered add up to **100 percent**.

8. Identify which of the designees will be the **Primary** recipient, and assign all others as **Contingent** (also known as **Secondary**) designees.

9. If desired, click the **Update Totals** button to view the total of the allocations entered for each selected beneficiary.

10. Click **Submit** when finished.