

## 9.2 Update Dependent/Beneficiary

**Purpose:** Use this document as a reference for how to enter or edit dependent information for benefits eligible employees in ctcLink.

**Audience:** Benefits Administrators.

**!** You must have at least one of these local college managed security roles:

- ZC Benefits Enrollments
- ZD Benefits Employee Data Inq

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

### Dependents and HCA/Pay1

PeopleSoft stores all dependent and beneficiary information for an employee who is benefits eligible. All entry for these dependents must be first completed in Pay1, as the HCA delivered interface is the system of record for dependent information.

If Pay1 is not immediately available, dependent information can also be entered directly into PeopleSoft. However, it can be overwritten by the nightly change file that comes from Pay1 should the Pay1 entry be different than the PeopleSoft entry.

## Update Dependent and Beneficiary

**Navigation:** NavBar > Navigator > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary

1. The **Update Dependent/Beneficiary** search page displays.
2. Enter the information of the benefits eligible employee associated with the dependents you wish to review.
3. Select the **Search** button.

## Update Dependent/Beneficiary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

### Search Criteria

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

Include History  Correct History  Case Sensitive

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)

4. The **Update Dependent/Beneficiaries** page displays.
5. The **Name** tab will display by default for Dependent 01.
6. All Dependents will be listed under the employee.
7. Navigation to the various dependents is achieved through using the arrows in the outer **Dependent/Beneficiary** box.
8. If the Dependent had ever possessed a different name under this employee, there will be multiple rows in **Name History**.

The screenshot displays the 'Name' tab of a dependent/beneficiary record. The 'Name' tab is highlighted with a red box. The interface includes a search bar for 'Dependent/Beneficiaries' with a '1 of 1' dropdown and 'View All' link. Below this is a form for a dependent with ID '01', including fields for 'Effective Date' (06/21/2019), 'Format Type', and 'Display Name'. An 'Edit Name' button is present. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'. Navigation links for 'Name', 'Address', and 'Personal Profile' are at the bottom left.

9. Select the **Address** tab.
10. The **Address** tab will display all associated addresses for this Dependent.
11. If the "**Same Address as Employee**" or "**Same Phone as Employee**" boxes are checked then the information for the employee will immediately default.
12. That defaulted information will not save unless the user clicks the **Save** button at the bottom of the page.
13. **NOTE:** As PeopleSoft is not the system of record for Dependent information, the user should not be saving here unless Pay1 is unavailable and causing Payroll deduction issues.

The screenshot shows the 'Dependent/Beneficiaries' form. The 'Address History' section is highlighted with a red box. It contains the following elements:

- Address History Header:** Search icon, '1 of 1' dropdown, and 'View All' link.
- Effective Date:** 06/21/2019 with a calendar icon and '+' '-' controls.
- Same Address as Employee:** A checkbox.
- Address Type:** A dropdown menu.
- Address Section:**
  - Country:** USA with a search icon and 'United States' text.
  - Address:** A text input field.
  - Edit Address:** A button.
- Phone Information Section:** Search icon, '1-1 of 1' dropdown, and a table with columns: Same As Employee, Phone Type, Telephone, Extension, Preferred, and '+' '-' controls.
- Email Section:** Search icon, '1-1 of 1' dropdown, and a table with columns: Email Type and Email Address.
- Footer Buttons:** Save, Return to Search, Notify, Update/Display, Include History, and Correct History.
- Navigation:** Name | Address | Personal Profile

14. Select the **Personal Profile** tab.
15. The **Personal Profile** tab provides the relationship to the employee in more detail.
16. Many of the PeopleSoft fields aren't used due to the fact that the Pay1 entry has nothing to map to in Personal Profile.
17. **National ID** (SSN) for the Dependent is also stored in Personal Profile.
  - If the SSN is not known at the time of entry, Pay1 entry must be 999-99-9999.
  - If the SSN entry is all 9's, the PeopleSoft interface will not populate any entry at all.
  - PeopleSoft will only accept unique SSN, if an SSN is entered that someone else already holds, the system will generate an error.
18. Any errors found in PeopleSoft must be corrected in Pay1, and the overnight change file will overlay the new information from Pay1 into PeopleSoft

Name Address **Personal Profile**

D Person ID 1C

Personal Profile 1 of 1 View All

Dependent/Beneficiary ID 01 + -

Date of Birth Birth Location  
 Birth Country Birth State  
 Date of Death Medicare Enrolled Date  
 Riders/Orders exist  
[Riders/Orders](#)

Personal History 1 of 1 View All

\*Effective Date 09/21/2019 + -  
 \*Relationship to Employee  
 \*Dependent Beneficiary Type  
 \*Gender Unknown  
 \*Marital Status Single As of  
 Student As of  
 Disabled As of  
 Smoker As of  
 Occupation

USA

National ID 1-1 of 1 View All

*Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number		<input checked="" type="checkbox"/>

Save Return to Search Notify Update/Display Include History Correct History

19. The process to update the dependent/beneficiary information is now complete.
20. End of procedure.