



Change a Beneficiary in Oracle Fusion- Self Service

- Identify what systems are required if applicable (Oracle, Blue etc.)- Oracle
- Whether the issue can be resolve via self-service or our website Y/N- **Y**
- Action Steps for Task/Resolution - **Steps Below**
- Information to resolve i.e. phone numbers websites - **Steps Below**
- **Please Highlight any information that can be used as a Macro in yellow**

Script on How Change/Update A Beneficiary in Oracle Fusion

When a caller is requesting to change/update a beneficiary, please follow the following script:

Script'': Total Rewards, (Name) speaking. How may I help you?

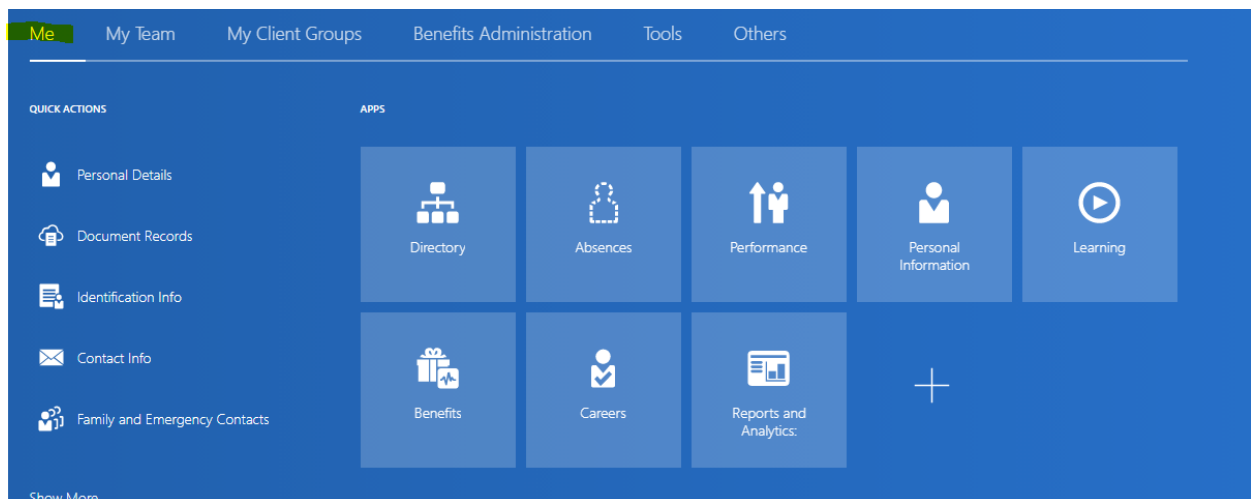
May I have your name?

May I have a phone number to reach you in case we get disconnected?

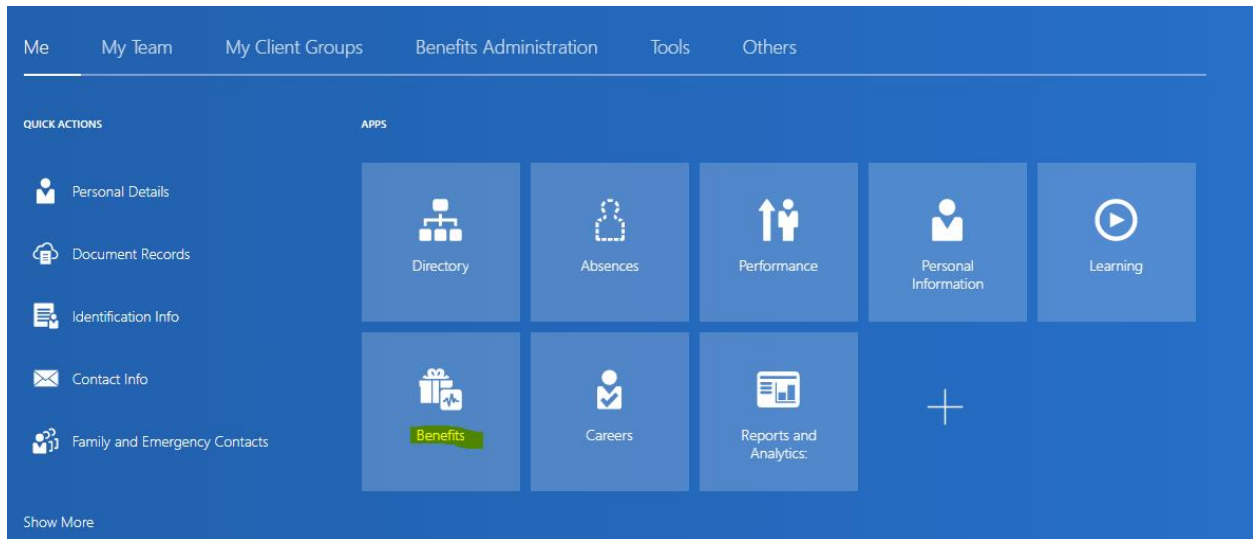
Please verify the last for digits of your social so that I may access your account.

Please follow the following steps to change a beneficiary.

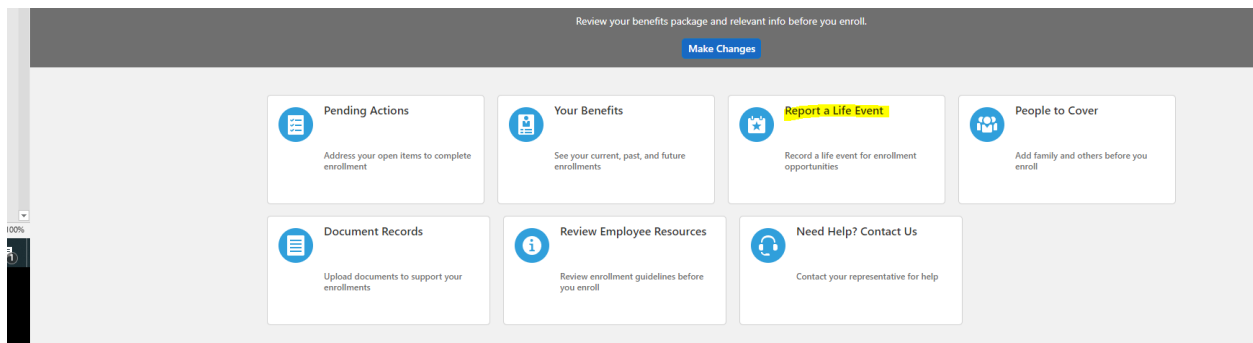
1. Log into -<https://memphistn.gov/fusion>
2. Once logged in click on ME



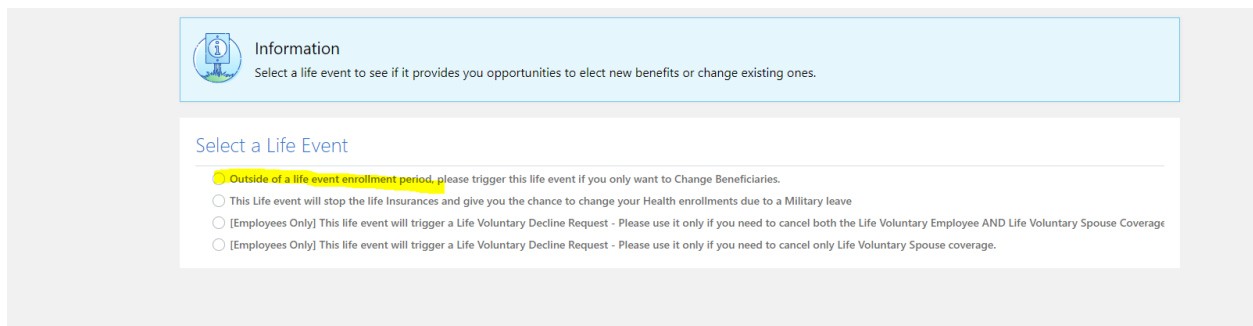
3. Click on Benefits



4. Click on Report a Life Event



5. Click on the first option- Outside of a life event enrollment period, please trigger this life event if you only want to Change Beneficiaries



6. You will be asked - When did this event occur? Enter the current date.

Information
Select a life event to see if it provides you opportunities to elect new benefits or change existing ones.

Select a Life Event

Outside of a life event enrollment period, please trigger this life event if you only want to Change Beneficiaries.
*When did this event occur?
m/d/yyyy

This Life event will stop the life Insurances and give you the chance to change your Health enrollments due to a Military leave

[Employees Only] This life event will trigger a Life Voluntary Decline Request - Please use it only if you need to cancel both the Life Voluntary Employee AND Life Voluntary Spouse Coverage

[Employees Only] This life event will trigger a Life Voluntary Decline Request - Please use it only if you need to cancel only Life Voluntary Spouse coverage.

7. Click on Continue

Event Continue Cancel

Information
Select a life event to see if it provides you opportunities to elect new benefits or change existing ones.

Select a Life Event

Outside of a life event enrollment period, please trigger this life event if you only want to Change Beneficiaries.
*When did this event occur?
9/12/2020

This Life event will stop the life Insurances and give you the chance to change your Health enrollments due to a Military leave

[Employees Only] This life event will trigger a Life Voluntary Decline Request - Please use it only if you need to cancel both the Life Voluntary Employee AND Life Voluntary Spouse Coverage

[Employees Only] This life event will trigger a Life Voluntary Decline Request - Please use it only if you need to cancel only Life Voluntary Spouse coverage.

8. Click OK to the Confirmation message

9. People to cover screen will show. You can add people to select as a beneficiary on this screen or Continue

People to Cover Continue Cancel

Information
To cover family and others in benefits, add them now before you enroll.

People + Add


10. Accept Authorization

By submitting this request, I understand and agree that this application or any document related to the use of the City of Memphis website that electronically uses my personal username and password, and/or any other credential, certifies that I am the person identified by the username and password, and/or any other credential and that I have not disclosed that username and password, and/or any other credential to anyone else. I further acknowledge that I understand that if I purposely give false or misleading information, all coverage(s) provided by the City of Memphis may be subjected to a denial of benefits and/or termination of all coverages.

By clicking on the "I Accept" button, this indicates that I have read, agree and understand all the above.

Accept Decline

11. Click on Edit under the Life Insurance Section and change/update beneficiaries as requested.

Life Insurance		 Edit
Life Insurance		
Life Employee Contributory 1.5 X Salary		4.84

12. Once completed, click submit.