

## Benefits Summary

A summary of your benefit selections can be accessed via the myUFL portal. The summary provides a list of some UF and state plans, if applicable. To access the Benefits Summary page, go to [my.ufl.edu](http://my.ufl.edu) and use the following navigation:

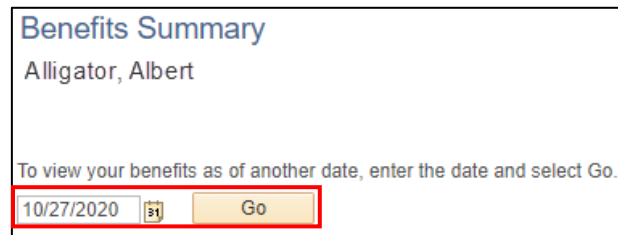
1. Click the **NavBar** icon.
2. Click **Main Menu**.
3. Click **My Self Service**.
4. Click **Benefits**.
5. Click **Benefits Summary**.

The following are the UF and state plans that can be viewed through the portal. Plans not reflected in the Benefits Summary section can be viewed on your biweekly paycheck.

<b>UF Plans</b>	<b>State Plans</b>
Health	Health
Dental	Dental
Vision	Vision
Life	Life
Legal	Flex Spending Medical Reimbursement

## Date of Benefits

The benefits information displayed on the Benefits Summary page default to your current benefit elections. The "As Of" date can be changed to a specific date (past or future) when your benefit elections may be different from your current ones.



The screenshot shows a web interface for the Benefits Summary page. At the top, it says "Benefits Summary" and "Alligator, Albert". Below this, there is a text prompt: "To view your benefits as of another date, enter the date and select Go." Underneath the prompt, there is a date input field containing "10/27/2020", a small calendar icon, and a "Go" button. A red rectangular box highlights the date input field and the "Go" button.

Figure 2: Benefits Summary Page, Date of Benefits

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### Changing Beneficiaries

Beneficiaries may be viewed or changed at any time during the year. The designation must be made in percentage allotments totaling 100% for primary beneficiaries and 100% for contingent beneficiaries, if applicable. The following items are needed to update or add beneficiaries:

1. Name
2. Address
3. Phone number
4. Date of Birth
5. Social Security Number

### State Plans

Beneficiaries for state (PeopleFirst) life plans may be designated or changed online at [www.lifebenefits.com/florida](http://www.lifebenefits.com/florida), or through a form found at [Forms and Documents](#). The form must be submitted to Securian's Tallahassee branch office at the address on the form.

DO NOT enter beneficiary information for state plans through the myUFL system. This information is not tracked or reported to the state.

### UF Select Plans

Changes to beneficiary information for UFSelect life plans can only be done via the Benefits Summary page. Visit the myUFL system and access the Benefits Summary page (as noted on page 1) to complete the following steps:

1. Click the hyperlink of the UF life plan you wish to edit.
2. Click the **Edit** button at the bottom of the screen.
3. Click the **Add a New Beneficiary** button to add a new person to your list of beneficiaries if the person is NOT already listed. If the person is already listed, skip to step 9.
4. Add the missing digits of your **SSN** and your **date of birth** in the security screen. Click **Verify Data**.
5. Add the new **beneficiary's information\***. Include beneficiary details. Click **Save**.  
Note: If the beneficiary does NOT have a SSN, please contact the UF HR Benefits Office for assistance.
6. Click the **Ok** button on the **Save Confirmation** page.
7. Click the **Dependent Beneficiary Detail** link.
8. Click the **Change Beneficiaries Allocations** link to return to the plan's main page.
9. Click on the **selection box** next to the name of the new or existing beneficiary.

10. Allocate percentage amount for each beneficiary in **new primary** or **new secondary allocation** column.
11. Click the **Update Totals** button to verify the allocations equal 100%. Click **Save**.
12. Click the **Ok** button on the **Save Confirmation** page.
13. Click the **Insurance Main** link and review covered beneficiaries.
14. Click the **Benefits Summary** link to return to the Benefits Summary page.

\*Important: If a minor (a person not of legal age) or your estate is the beneficiary, it may be necessary to have a guardian or a legal representative appointed by the court before any death benefit may be paid. If the beneficiary is a trust, the trustee must be identified in the beneficiary designation. To designate a trust as a beneficiary, you must enter the trustee's information as a beneficiary and select the "Estate" option in the **Relationship to Employee** field from the drop down menu.

### Beneficiary Tips

When selecting a beneficiary, consider the following points:

- Your designation revokes all prior designations.
- Benefits are payable to a contingent beneficiary only if you are not survived by one or more primary beneficiaries.
- If you name two or more beneficiaries in a class (primary or contingent), two or more surviving beneficiaries will share equally, unless you provide for unequal shares.
- A power of attorney must grant specific authority, by the terms of the document or applicable law, to make or change a beneficiary designation. If you have questions, consult your legal advisor.
- Dependents Insurance and Supplemental Life Insurance on your Spouse, if any, is payable to you, if living, or as provided under your Employer's coverage under the Group Policy.

### For Additional Assistance:

#### Technical Issues

The UF Computing Help Desk  
(352) 392-HELP  
[helpdesk.ufl.edu](http://helpdesk.ufl.edu)

#### Policies and Procedures

UF HR Benefits  
(352) 392-2477  
[benefits@ufl.edu](mailto:benefits@ufl.edu)