1. Pay Warrant Designee
2. CalPERS Retirement
3. The Standard Life Insurance
1. Pay Warrant Designee

Change Designee in PeopleSoft Self Service

1. Starting on the ‘My Homepage’ click on ‘Employee Self Service’

2. Click on ‘Payroll and Compensation’
3. Next click on ‘Final Pay Warrant’ Designee

4. Click on ‘Change Designee’ and input information for Primary Designee & Contingent Designee
5. If you want to add a 2nd contingent designee you can click on the option below. Once you are finished adding designee’s click on ‘I Agree’

![Add A Second Contingent Designee]

6. Scroll to the top of the page and press ‘Print’ if you would like to print a copy of your designee’s. Designee’s can be changed at anytime.
2. CalPERS Retirement

1. Begin at the CalPERS website: [https://www.calpers.ca.gov/](https://www.calpers.ca.gov/)

2. Click on ‘Active Members’, then click on ‘Death Benefits’.

3. After clicking on Death Benefits, click on ‘Beneficiary Designation’.

4. The next page will give you an option to change your beneficiary designation either via online or by mail.
When you click either tab, detailed instructions will walk you through step-by-step on how to make changes.

**INSTRUCTIONS for ONLINE OPTION**

1. Begin on the CalPERS website: [https://www.calpers.ca.gov/](https://www.calpers.ca.gov/)

2. Follow the screens to log-in. There are log-in/registration instructions enclosed with this packet.
Once you login to your CalPERS account, scroll to the ‘More Information’ section and click on ‘Add or Change your Beneficiaries’

**More Information**

If designations have already been made, they will be prepopulated. If the designations are correct there is nothing further you would need to do. If there are changes you would like to make you can click on the ‘Change My Beneficiaries’ button to make changes. Just follow the prompts to make changes.

<table>
<thead>
<tr>
<th>Beneficiary Type</th>
<th>Name</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Beneficiary</td>
<td>Spouse</td>
<td>100.00%</td>
</tr>
<tr>
<td>Secondary Beneficiary</td>
<td>Child</td>
<td>33.33%</td>
</tr>
<tr>
<td>Secondary Beneficiary</td>
<td>Child</td>
<td>33.33%</td>
</tr>
</tbody>
</table>

Update Information

Change My Beneficiaries
INSTRUCTIONS for PAPER FORM OPTION

If you prefer to submit your beneficiary designations via paperform and mail them to CalPERS, you can download and print the form from their website and mail it to the address listed on the form.

Active members who want their death benefits paid to a designated beneficiary must complete a Pre-Retirement Lump Sum Beneficiary Designation (PDF) and mail it to the address listed on the form.
3. The Standard Life Insurance

Life insurance beneficiaries for the Basic and/or Voluntary Life insurance policies administered by The Standard can be updated online or through a paper form. An on-line account is necessary in order to facilitate a beneficiary change through their online system.

INSTRUCTIONS for PAPER FORM OPTION

1. Begin at the Fresno State benefits website to navigate to The Standard Website.

http://fresnostate.edu/adminserv/hr/benefits/index.html
2. When on the website click on ‘Forms’ and then choose ‘Beneficiary Designation and Change Form’

A fillable PDF form will open up. You can complete the form and send it to the address indicated on the top of the form.

**INSTRUCTIONS for ONLINE OPTION**

You can access The Standards website/log in page by visiting the link below or accessing it on the Benefits website.

The Standard website

Benefits Webpage
If you have already created an account or if it is your first time here you will need to input the requested information and then click ‘Log in’

Once you are logged in you will be able to review your personal information or you can select the option to change your beneficiary. One of the first options on the right side of the screen will be ‘Change my beneficiary’. Or if you wanted to review your information first, click on ‘Next’ at the bottom of the screen:

The ‘Change my beneficiary’ option will take you straight to the plan election page, you simply click ‘Next’ to continue on and make your changes before submitting them.
If you wanted to review your information first, from the home screen click on ‘Next’ and continue reviewing. You can follow the prompts to make changes or keep beneficiaries the same until you are ready to submit.