

Required Forms: Processing Beneficiary Forms in Ariel – Cheat Sheet

Required Forms Feature

The Required Forms feature lists all outstanding forms that the Ariel system has triggered. Once outstanding forms are completed and processed, they can be marked to show that they are no longer pending. Once the form is no longer pending, the form will no longer show listed under Required Forms.

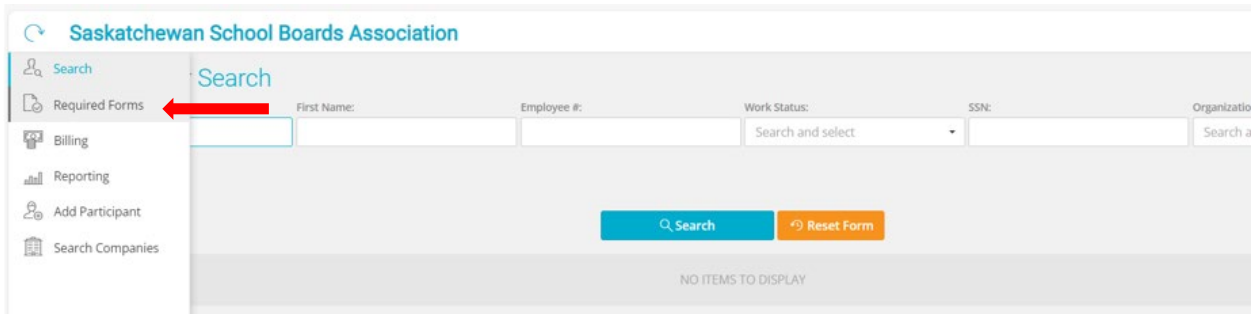
Beneficiary Form Processing

The system produces a Beneficiary Form to be signed in ink in the following 2 scenarios:

- There is a beneficiary designation that requires a Trustee
- The beneficiary designations have been completed by the Plan Administrator on behalf of the Plan Member.

Once the Plan Member has signed the Beneficiary Form, the Plan Administrator can go ahead and mark the form as **Approved**. If the Beneficiary Form was produced in error, the form can be marked as **Cancelled**. See below instructions.

1. Select the **Required Forms** feature from the left navigation bar.



The screenshot shows the Ariel system interface for the Saskatchewan School Boards Association. The left navigation bar is visible, with the 'Required Forms' option highlighted and a red arrow pointing to it. The main content area displays a search form with fields for First Name, Employee #, Work Status, SSN, and Organization. Below the search fields are 'Search' and 'Reset Form' buttons. The status at the bottom indicates 'NO ITEMS TO DISPLAY'.

- This will bring up a list of all outstanding forms. The list can be sorted by clicking the blue headings, or you can search a particular plan member by completing one or some of the blank fields and clicking **Search**.

Outstanding Required Forms/Documents

First Name: Last Name: Employee Id: Benefit Event:

Status: Form/Document Name: Received Date:

Document Name	First Name	Last Name	Employee Id	Dependent Name	Status	Benefit Event	Benefit Event Date	Expires	Received Date	Action
Beneficiary Designation Form	Dolores	Test	632103174		Pending Generation	New Hire	01/09/2021	30/11/2021		
Application and EOI for Optional Life Insurance	Dolores	Test	632103174		Pending Generation	New Hire	01/09/2021	30/11/2021		
Application and EOI for Optional Life Insurance	Dolores	Test	632103174		Pending Generation	Marriage or Common Law	10/10/2021	10/01/2022		
Application and EOI for Optional Life Insurance	Dolores	Test	632103174		Generated	Birth or Adoption of a Child	01/11/2021	07/02/2022		
Application and EOI for Optional Life Insurance	Dolores	Test	632103174		Generated	Birth or Adoption of a Child	07/11/2021	07/02/2022		
Beneficiary Designation Form	Dolores	Test	632103174		Generated	Birth or Adoption of a Child	01/11/2021	07/02/2022		
Beneficiary Designation Form	Avi	Test	632102771		Generated	Birth or Adoption of a Child	06/07/2022	17/10/2022		
Beneficiary Designation Form	Avi	Test	632102771		Generated	Birth or Adoption of a Child	15/09/2022	09/01/2023		
Application and EOI for Optional Critical Illness	Avi	Test	632102771		Generated	Birth or Adoption of a Child	15/09/2022	09/01/2023		
Application and EOI for Optional Life Insurance	Avi	Test	632102771		Generated	Birth or Adoption of a Child	15/09/2022	09/01/2023		

19 results found 10

- To approve or cancel a pending form, click the edit icon in the row of the form that needs processing.

Document Name	First Name	Last Name	Employee Id	Dependent Name	Status	Benefit Event	Benefit Event Date	Expires	Received Date	Action
Beneficiary Designation Form	Christoher	Test	632102606		Pending Generation	Birth or Adoption of a Child	16/06/2021	12/11/2021		
Application and EOI for Optional Life Insurance	Christoher	Test	632102606		Pending Generation	Birth or Adoption of a Child	16/06/2021	12/11/2021		
Application and EOI for Optional Life Insurance	Christoher	Test	632102606		Pending Generation	Administrator Override	01/07/2021	12/11/2021		

- Enter a **Received Date** and select **Approved** or **Cancelled** from the **Document External Id Status** drop down. Select **OK**.

Update Form Status

Form/Document Name: Beneficiary Designation Form

Benefit Event: Birth or Adoption of a Child

Benefit Event Date: 16/06/2021

Benefit Event Stage: Completion

Generated Date: 14/08/2021

Generated Prn: 298699

Received Date:

Receipt Prn: 0

Expires: 12/11/2021

Document External Id Status:

- Validate that the form is no longer 'Pending Generation'. It should no longer be visible under the list of required forms.

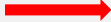
Document Name	First Name	Last Name	Employee Id	Dependent Name	Status	Benefit Event	Benefit Event Date	Expires	Received Date	Action
Application and EOI for Optional Life Insurance	Christoher	Test	632102606		Pending Generation	Birth or Adoption of a Child	16/06/2021	12/11/2021		
Application and EOI for Optional Life Insurance	Christoher	Test	632102606		Pending Generation	Administrator Override	01/07/2021	12/11/2021		

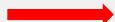
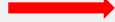
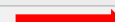
- Validate that the prior pending beneficiary information is no longer pending and matches the information on the signed form received.

Beneficiary Information: should show a Status of **Active**

Beneficiary Associations: should show Pending status as **No**

Beneficiaries

Beneficiary Information						
Name	Birthdate	Relationship	Status			
Baby, Test	13/08/2021	Child	 Active			

Beneficiary Associations						
AD&D - AD&D						
Name	Effective Date	End Date	Contingent	Percent	Revocable	Pending
Test Baby	16/06/2021	-	No	100	Yes 	No
Employee Life - Employee Life						
Name	Effective Date	End Date	Contingent	Percent	Revocable	Pending
Test Baby	16/06/2021	-	No	100	Yes 	No
Optional Life - Optional Life						
Name	Effective Date	End Date	Contingent	Percent	Revocable	Pending
Test Baby	16/06/2021	-	No	100	Yes 	No