

## Annual Enrollment Job Aid-Retiree

This job aid provides step-by-step information for completing annual enrollment through the Lilly Benefits Center website. Additional step-by-step instructions for performing health care provider searches and designating beneficiaries, is provided in the appendices at the end of the job aid.

**2014 Annual Enrollment is from Monday, October 21 to Friday, November 8, 2013.**

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### **Important! U.S. Social Security Numbers for All Eligible Dependents**

Due to requirements by the U.S. government, we are required to collect the U.S. Social Security number for all eligible participants under the Lilly Health Plan. Please confirm that this information is recorded for each of your eligible dependents on the Lilly Benefits Center website. Failure to provide the required Social Security numbers may cause claims to be denied, pending receipt of the information.

## Making Your Annual Benefit Elections

**Procedure**            The following table illustrates the steps that are necessary to complete your enrollment via the Lilly Benefits Center website.

## Annual Enrollment Job Aid-Retiree

Step	Action
<b>1a</b>	<p><b>Calling the Lilly Benefits Center</b></p> <p>If you call the Lilly Benefits Center with an enrollment question, you will need to provide the Password you use to access your 401(k) information through the internet using a non-Lilly computer.</p> <p><b>Resetting Your Lilly Benefits Center Password</b></p> <p>If you have forgotten your Lilly Benefits Center password or are unable to answer your security questions, you can reset your password when logging in to the Lilly Benefits Center using your Lilly computer.</p> <ol style="list-style-type: none"> <li>1. Access the Lilly Benefits Center website at <a href="http://benefitscenter.lilly.com">http://benefitscenter.lilly.com</a></li> <li>2. Click on “Personal Info” in the top menu.</li> <li>3. Click on “Log On Info” in the menu below. Your user ID will display.</li> <li>4. Next to Password and Hint, click on “Change.”</li> <li>5. Enter a new password and create a hint.</li> <li>6. Click “Change Password.” A confirmation screen will appear.</li> <li>7. If you need to answer the 5 security questions, click on “Change” to enter your answers.</li> <li>8. Click “Change Security Questions” and the confirmation screen will appear.</li> </ol>
<b>1b</b>	<p><b>Access the Lilly Benefits Center website using a computer</b></p> <p>--Type in the web address: <a href="http://benefitscenter.lilly.com">http://benefitscenter.lilly.com</a></p> <p>--Enter your <b>Lilly Benefits Center User ID and Password</b>.</p> <p>--Click <b>Log On</b> to access the annual enrollment page.</p>

# Annual Enrollment Job Aid-Retiree

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## Lilly Benefits Center

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### Log On

**⚠** For increased security, Social Security Numbers can no longer be used to log on to this site. If you haven't done so already, you must [create your user ID](#)

User ID [I Forgot My User ID](#)

Password<sup>1</sup> [I Forgot My Password](#)

[Log On](#) [Register as a New User](#)

By logging on, you agree to the [Terms of Service](#).

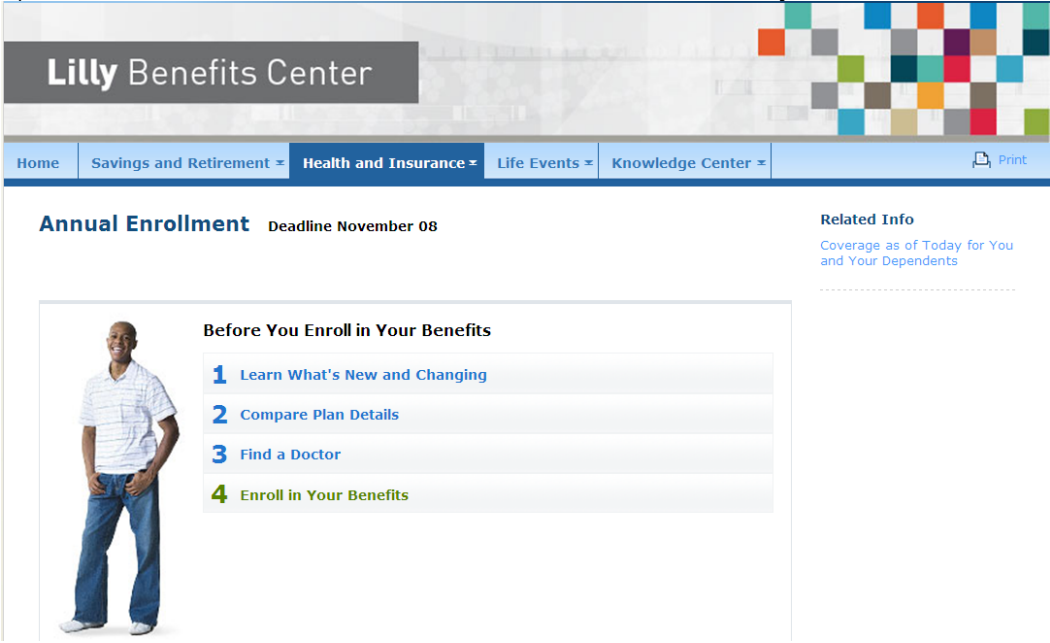
### Answer Center

[Log On Help](#)

See our [Privacy Statement](#) to learn how we collect, use and protect your personal information.

**NOTE:** Your User ID and Password are the same ones you use to access your 401(k) information through the internet using a non-Lilly computer. If you have difficulties logging on to the website, please contact the Lilly Benefits Center for assistance at 1-800-472-4720. (The international phone number is 1-847-883-0427).

# Annual Enrollment Job Aid-Retiree

Step	Action
2	<p><b>PREPARE for the Annual Enrollment Process</b></p> <p>1.) Click the “Enroll In Your Retiree Benefits” link.</p> <p>Welcome,</p> <div style="border: 1px solid orange; padding: 10px; margin: 10px 0;"> <p><b>Action Needed!</b></p> <p>Enroll in Your Retiree Benefits <span style="float: right;">Deadline: 11-08-2013 <a href="#">Enroll</a></span></p> <hr/> <p>Your Profile : Please update your security information by answering the security questions in Your Profile <span style="float: right;"><a href="#">Change</a></span></p> </div> <p>2) Click the boxes related to various sections to understand your new benefits</p> 
3	<p>1. Click the “Enroll in your benefits” box (step 4)</p> <p>2. Click the <b>Enroll</b> button to begin the annual enrollment process.</p>

## Annual Enrollment Job Aid-Retiree

Step	Action
4	<p data-bbox="367 222 631 258"><b>Enroll in Benefits</b></p> <p data-bbox="367 275 1305 344">The <i>Enroll in Your Benefits</i> screen provides a list of all the benefits available for enrollment.</p> <p data-bbox="367 386 1406 455">The initial option listed under each benefit is the coverage you will receive if you don't complete your enrollment by the deadline.</p> <p data-bbox="367 497 1382 638"><b>NOTE 1:</b> If you currently have no medical coverage in 2013, you will continue with no medical coverage for 2014. If you currently have no Prescription Drug coverage in 2013, you will continue with no Prescription Drug coverage for 2014.</p> <p data-bbox="367 680 1414 785"><b>NOTE 2:</b> <u>Medical and dental coverage are elected independently.</u> If you currently have no dental coverage in 2013, you will continue with no dental coverage in 2014.</p> <p data-bbox="367 827 1352 932"><b>NOTE 3:</b> You must make a new election for the HSA Employee Contribution or you will have <b>no coverage</b> for that benefit in 2014.</p> <p data-bbox="367 974 1349 1005">Click on each <a href="#">benefit</a> to review the coverage options for each benefit.</p>

# Annual Enrollment Job Aid-Retiree


Lilly Benefits Center

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Home
Savings and Retirement ▾
Health and Insurance ▾
Life Events ▾
Knowledge Center ▾

## Enroll In Your Benefits

This is the coverage you'll receive, effective **01-01-2014**, if you don't make any changes. You can make changes, including declining coverage, by selecting **View/Change** below.

[Current vs. New Coverage and Costs](#)



We are available to answer your questions between **9:00 a.m. and 5:00 p.m. Eastern time**, Monday through Friday. Click on the image below to chat with a Customer Service Representative.

**8 Days Left**

Enroll by 11-08-2013


Your Monthly Cost

Coverage effective 01-01-2014

<b>Medical including Prescription Drug</b>	<b>Anthem HRA/ CVS Caremark</b> Participant + 2 dependents (DIANA, Janice)	<a href="#">View/Change</a>	<b>\$786.60</b>
<b>Anthem HSA Employer Contribution (no election required)</b>	Coverage Amount - \$0.00/year		<b>\$0.00</b>
<b>Dental</b>	<b>Anthem Dental</b> Participant + 2 dependents (DIANA, Janice)	<a href="#">View/Change</a>	<b>\$35.40</b>
<b>Retiree Death Benefit</b>	You can't change your Retiree Death Benefit option. \$5,000 Death Benefit Coverage - \$5,000.00 <a href="#">Choose a Beneficiary</a>	<a href="#">View/Change</a>	<b>\$0.00</b>

The tools and calculators sidebar is available to assist you with your benefits decisions while you are enrolling.

## Annual Enrollment Job Aid-Retiree

Step	Action								
5a	<p><b>Verifying Dependent Eligibility and Coverage</b></p> <p>--Click on “<b>View/Change</b>” next to <a href="#">Medical including Prescription Drug</a> on the <i>Enroll in Your Benefits</i> page.</p> <p>--<b>Scroll</b> down to view your dependents.</p> <p>--<b>Verify</b> if each listed dependent is still eligible for coverage. If not, refer to the section below titled <b>Remove a Dependent from Coverage</b>.</p> <p><b>Important:</b> You cannot add any new dependents to the plan unless you:</p> <ul style="list-style-type: none"> <li>• Had already added them to the Lilly Benefits Center and they are an available option to pick</li> <li>and</li> <li>• Are not Medicare eligible</li> </ul> <p>--If you need to add a dependent to coverage, refer to the section below titled <b>Adding a Dependent to Coverage</b>.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Choose Who's Covered</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Dependent Name</th> <th style="text-align: left;">Birth Date</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> <a href="#">Spouse Participant</a></td> <td>04-19-1965</td> </tr> <tr> <td><input checked="" type="checkbox"/> <a href="#">Child Participant</a></td> <td>09-27-1995</td> </tr> <tr> <td><input checked="" type="checkbox"/> <a href="#">Child Participant</a></td> <td>06-24-1999</td> </tr> </tbody> </table> </div> <div style="text-align: center; margin: 10px 0;">  </div> <p><b>Remove a Dependent from Coverage</b></p> <p>To remove a dependent because he/she is no longer eligible for coverage, report a life event.</p> <ol style="list-style-type: none"> <li>1. Click on “Health and Insurance...” in the top menu.</li> <li>2. Click on the “Life Events” link.</li> <li>3. Select the event that has necessitated the change and enter the date your dependent’s eligibility changed as the date of the event. (If it has been more than 60 days, please contact the Lilly Benefits Center.)</li> <li>4. Once you have completed the life event to remove the dependent, click on Annual Enrollment in the top menu and return to Step 2.</li> </ol>	Dependent Name	Birth Date	<input checked="" type="checkbox"/> <a href="#">Spouse Participant</a>	04-19-1965	<input checked="" type="checkbox"/> <a href="#">Child Participant</a>	09-27-1995	<input checked="" type="checkbox"/> <a href="#">Child Participant</a>	06-24-1999
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# Annual Enrollment Job Aid-Retiree

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<b>5b</b>	<p><b>Elect Medical including Prescription Drug Coverage</b></p> <p>--<b>Scroll</b> down to the listing of medical coverage options.            --<b>Select</b> your medical coverage for the new year.            --<b>Choose</b> who is to be covered by <b>“checking the box”</b> next to each dependent’s name.            --<b>Click</b> <span style="border: 1px solid black; padding: 2px;">Continue</span> to move to the next enrollment screen.            --<b>For HSA Enrollment:</b> Click <span style="border: 1px solid black; padding: 2px;">OK</span> after reading the disclaimer.</p> <div style="border: 1px solid gray; padding: 10px; margin-top: 10px;"> <p><b>Enrollment</b>  <b>Medical including Prescription Drug</b></p> <p>Lilly offers you health insurance options. You and your dependents will automatically receive the Prescription Drug Benefit if you choose coverage in the Medical plan. To learn more about your plan options, see the Compare Medical Options link on the right sidebar.</p> <p>Note: Participation in the Employee Assistance Program (EAP) may be available to you and your eligible dependents with or without medical coverage through Lilly. COBRA participants and retirees over 65 must be enrolled in medical coverage to participate in EAP.</p> <p><b>Choose Your Option</b>            Coverage effective <b>01-01-2014</b> <span style="float: right; border: 1px solid gray; padding: 2px;">Monthly</span></p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="text-align: left;">Option</th> <th>Participant Only</th> <th>Participant + 1 dependent</th> <th>Participant + 2 dependents</th> <th>Participant + 3 or more dependents</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/> No Coverage</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input checked="" type="radio"/> Anthem HRA/CVS Caremark<sup>1</sup></td> <td>\$262.20</td> <td>\$524.40</td> <td style="background-color: yellow;">\$786.60</td> <td>\$1,048.80</td> </tr> <tr> <td><input type="radio"/> Anthem HSA/CVS Caremark<sup>2</sup></td> <td>\$257.20</td> <td>\$514.40</td> <td>\$771.60</td> <td>\$1,028.80</td> </tr> <tr> <td><input type="radio"/> Anthem PPO/CVS Caremark</td> <td>\$269.20</td> <td>\$538.40</td> <td>\$807.60</td> <td>\$1,076.80</td> </tr> </tbody> </table> <p><small><sup>1</sup>If you enroll in the Anthem HRA option, Lilly will make a contribution to a Health Reimbursement Account (HRA) based on your coverage level and the effective date of coverage.</small></p> <p><small><sup>2</sup>If you enroll in the Anthem HSA option, Lilly will make a contribution to a Health Savings Account (HSA) based on your coverage level and the effective date of coverage. COBRA participants are not eligible to receive a contribution from Lilly. While a current employee may make additional contributions to an account by payroll deduction, anyone enrolling in this option may contribute to an account up to the annual IRS maximum by submitting funds for deposit directly to Mellon Bank.</small></p> <p><small><sup>3</sup>Please remember that you should only elect the Health Savings Account option if you or your covered dependents are not already participating in a non-high deductible health plan (through a spouse, another employer, or Medicare)</small></p> </div> <div style="margin-top: 10px;"> <p><b>Choose Who's Covered</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Dependent Name</th> <th>Birth Date</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> <a href="#">Spouse Participant</a></td> <td>04-19-1965</td> </tr> <tr> <td><input checked="" type="checkbox"/> <a href="#">Child Participant</a></td> <td>09-27-1995</td> </tr> <tr> <td><input checked="" type="checkbox"/> <a href="#">Child Participant</a></td> <td>06-24-1999</td> </tr> </tbody> </table> </div> <div style="text-align: center; margin-top: 10px;"> <div style="background-color: #4F81BD; color: white; padding: 10px 20px; display: inline-block; border-radius: 5px;">Continue</div> </div>	Option	Participant Only	Participant + 1 dependent	Participant + 2 dependents	Participant + 3 or more dependents	<input type="radio"/> No Coverage	\$0.00	\$0.00	\$0.00	\$0.00	<input checked="" type="radio"/> Anthem HRA/CVS Caremark <sup>1</sup>	\$262.20	\$524.40	\$786.60	\$1,048.80	<input type="radio"/> Anthem HSA/CVS Caremark <sup>2</sup>	\$257.20	\$514.40	\$771.60	\$1,028.80	<input type="radio"/> Anthem PPO/CVS Caremark	\$269.20	\$538.40	\$807.60	\$1,076.80	Dependent Name	Birth Date	<input checked="" type="checkbox"/> <a href="#">Spouse Participant</a>	04-19-1965	<input checked="" type="checkbox"/> <a href="#">Child Participant</a>	09-27-1995	<input checked="" type="checkbox"/> <a href="#">Child Participant</a>	06-24-1999
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**Related Info**  
[View your current Medical including Prescription Drug coverage](#)

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**Tools and Calculators**

- [Compare Medical including Prescription Drug Options](#)
- [Find a Doctor or Hospital](#)




## Annual Enrollment Job Aid-Retiree

Step	Action				
<b>5c</b>	<p><b>Verify</b> that all dependents you wish to cover for health care are listed under the medical plan option on the <i>Enroll in Your Benefits</i> screen. If all the dependents are not listed, you didn't check the box next to their name.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p style="font-size: small; color: #666;">Coverage effective 01-01-2014</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"><b>Medical including Prescription Drug</b></td> <td style="width: 40%; padding: 5px;">Anthem HRA/CVS Caremark Participant + 2 dependents (DIANA, Janice)</td> <td style="width: 15%; padding: 5px; text-align: center;"><a href="#" style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">View/Change</a></td> <td style="width: 15%; padding: 5px; text-align: right;">\$786.60</td> </tr> </table> </div>	<b>Medical including Prescription Drug</b>	Anthem HRA/CVS Caremark Participant + 2 dependents (DIANA, Janice)	<a href="#" style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">View/Change</a>	\$786.60
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<b>5d (optional)</b>	<p><b>NOTE:</b> The Anthem HSA Employer Contribution section will always appear on the <i>Enroll in Your Benefits</i> screen if you can enroll in the HSA plan, regardless of your medical coverage election. If you don't enroll in the Anthem HSA, please ignore this section.</p> <p><b>HSA Employee Contribution</b> If you would like to contribute an Employee Contribution, you will need to work directly with Mellon.</p> <p style="color: red; font-weight: bold; margin-top: 10px;">Remember that you still have to open your HSA account! Choosing the Anthem HSA option will only elect the High Deductible Health Plan, but your account needs to be opened with Mellon Bank.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px; background-color: #f9f9f9;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; padding: 5px;"><b>Anthem HSA Employer Contribution (no election required)</b></td> <td style="width: 40%; padding: 5px; text-align: right;">Coverage Amount - \$0.00/year</td> </tr> </table> </div>	<b>Anthem HSA Employer Contribution (no election required)</b>	Coverage Amount - \$0.00/year		
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## Annual Enrollment Job Aid-Retiree

Step	Action								
<b>5e</b>	<p><b>Elect Dental Coverage</b></p> <p>--<b>Select</b> your dental coverage for the new year.            --<b>Choose</b> who is to be covered by “<b>checking the box</b>” next to each dependent’s name.            --<b>Click</b> <span style="border: 1px solid black; padding: 2px;">Continue</span> to move to the next enrollment screen.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Choose Who's Covered</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Dependent Name</th> <th style="text-align: left;">Birth Date</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> <a href="#">Spouse Participant</a></td> <td>04-19-1965</td> </tr> <tr> <td><input checked="" type="checkbox"/> <a href="#">Child Participant</a></td> <td>09-27-1995</td> </tr> <tr> <td><input checked="" type="checkbox"/> <a href="#">Child Participant</a></td> <td>06-24-1999</td> </tr> </tbody> </table> </div> <div style="text-align: center; margin-top: 10px;"> <span style="background-color: #4F81BD; color: white; padding: 10px 20px; border-radius: 5px; display: inline-block;">Continue</span> </div>	Dependent Name	Birth Date	<input checked="" type="checkbox"/> <a href="#">Spouse Participant</a>	04-19-1965	<input checked="" type="checkbox"/> <a href="#">Child Participant</a>	09-27-1995	<input checked="" type="checkbox"/> <a href="#">Child Participant</a>	06-24-1999
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<b>6</b>	<p><b>Elect Other Benefits</b></p> <p>From the <i>Enroll in Your Benefits</i> screen, continue to click on each <a href="#">blue benefit title</a> to review and/or change your coverage under each benefit, if applicable. Remember, you only need to click on those benefits you want to change for the new year.</p>								

## Annual Enrollment Job Aid-Retiree

Step	Action
<b>7</b>	<p><b>Designate/Change Beneficiaries</b></p> <p>As you review your 401(k) plan, death benefit coverage and any life insurance plans for which you have coverage, please enter/review your online beneficiary designations. Consult <a href="#">Appendix D</a> for guidelines and information about designating a beneficiary.</p>
<b>8a</b>	<p><b>Save Your Annual Enrollment Elections</b></p> <p>To save your elections, click <span style="border: 1px solid black; padding: 2px;">Complete Enrollment</span>. You will receive the following message.</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p><small>Microsoft Internet Explorer</small></p> <p> To change any of your benefit choices, choose Cancel. To complete your enrollment, choose OK. If necessary, you can come back to the site anytime before the enrollment deadline to change your choices.</p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div> <p>If you want to complete your enrollment, click <span style="border: 1px solid black; padding: 2px;">OK</span>.</p>
<b>8b</b>	<p><b>Print the “Completed Successfully” page for Your Records</b></p> <p>--When you receive the message below, your enrollment has been <b>saved</b>.          --You will also receive an e-mail each time you confirm your enrollment, if an email address is on file.          --<b>Print</b> the confirmation statement each time you save your enrollment.</p> <p>You can return to the website to make changes as many times as you like before the enrollment deadline. The most recent confirmed elections on file when annual enrollment closes will be saved and be effective on January 1 of the new year.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p><b>Enrollment</b>  <b>Completed Successfully</b></p> <p>Your enrollment has been completed successfully. You won't receive a statement in the mail.</p> <p><b>Next Steps</b></p> <ul style="list-style-type: none"> <li>▪ <b>PRINT</b> a copy of the confirmation statement.</li> <li>▪ <b>REVIEW</b> your elections for accuracy.</li> <li>▪ <b>SAVE</b> a copy of your confirmation statement to compare to your pay or billing advice.</li> </ul> <p><small>(Note: If you make changes to your enrollment during multiple website sessions, only the final confirmation statement is valid.)</small></p> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px; width: fit-content;"> <p><b>Did You Know?</b></p> <p>You should receive an ID card from your plan around 01-01-2010. However, there are some <a href="#">situations when you won't receive an ID card</a>. If you require medical services after 01-01-2010 and you haven't received your card, call your plan or see <a href="#">Health Plan ID Cards</a> to learn what to do.</p> </div>

## Annual Enrollment Job Aid-Retiree

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### APPENDIX A Determine If Your Medical Provider is In-Network

All three health care options feature the Blue Cross<sup>®</sup> and Blue Shield<sup>®</sup> National PPO Network—a network that includes over 700,000 doctors and thousands of hospitals and other medical facilities nationwide.

#### **Anthem Website Medical Provider Search**

To determine if your **doctor** or **medical facility** is in-network using the Anthem website.

1. Go to [www.anthem.com](http://www.anthem.com)
2. Along the right-hand side of the screen, click “Find a Doctor” and “GO.”
3. Under “National Directories,” click “Search the National BlueCard Directory” and click “Next.”
4. On the upper right-hand corner of the **ProviderFinder** screen, you can choose to either “Search by Location” to find providers in a certain area or “Lookup by Name” to find a specific provider.
5. In the “Members” section of the **ProviderFinder** screen, type “EYU.”
6. Enter your search criteria and click “Next.”
7. Select “Provider Type” from the drop-down menu. You can narrow your search by selecting a specialty category.
8. Click “View Results.”

**NOTE:** Remember that you can continue to see your doctor, even if he or she isn't part of the network of providers. Although you'll receive a greater level of reimbursement if you stay in-network, you can see any provider you wish.

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## Annual Enrollment Job Aid-Retiree

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### APPENDIX B Determine If Your Dental Provider is In-Network

The dental benefit operates as a PPO, meaning in-network and out-of-network charges will apply. Although you are free to go to the dentist of your choice, you likely will pay less by using an in-network provider.

To find out if your **dentist** is in-network, visit Anthem's website at [www.anthem.com](http://www.anthem.com):

1. Along the right-hand side of the screen, click "Find a Doctor" and "GO."
2. Under "National Directories," click "Find a Dental Provider".
3. Click "Next."
4. In the "Plan Type" drop-down box, select "**Dental Plans**."
5. Click "Next".
6. In the "Plan Name" drop-down box, select "**Dental Blue 300**."
7. In the "Select A Specialty Category" drop-down box, select a specialty type to narrow your search.
8. Click "Next."
9. Enter your search criteria.
10. Click "View Results."

**NOTE:** The advantage of using one of the 150,000 dentists in the network is that they have agreed to negotiated rates that may be lower than the rates charged by an out-of-network dentist. Also, you will be responsible for any charges over the usual and customary amounts if you choose an out-of-network dentist.

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## Annual Enrollment Job Aid-Retiree

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### APPENDIX C Determine If Your Vision Provider is In-Network

The robust Blue View Vision network includes many providers country-wide. To find out if your **vision provider** is in-network, visit Anthem's website at [www.anthem.com](http://www.anthem.com):

1. Along the right-hand side of the screen, click "Find a Doctor" and "GO."
  2. Under "National Directories," click on "View National Vision Provider Directory" and click "Next".
  3. Continue through the pop-up by clicking "Next".
  4. Enter your search criteria.
  5. Click "View Results."
  6. Choose a nearby provider.
- 
-

# Annual Enrollment Job Aid-Retiree

## APPENDIX D Beneficiary Designations on the Lilly Benefits Center website

1. All beneficiary designations (with the exception of spouse life and child life insurance\*) are entered online. This approach permits the participant to easily access and update beneficiary information anytime throughout the year.
2. If you submitted beneficiary choices for the company-provided death benefit, supplemental life insurance or Flexible CarePLUS on paper before 06-01-2005, your choices are on file but won't appear on the website.
3. If you submitted 401(k) beneficiary choices on paper before 06-01-2007, your choices are on file but won't appear on the website.
4. All new online beneficiary designations void any previous beneficiary designations submitted to Lilly using paper beneficiary forms.
5. All beneficiary designations for a current coverage become effective on the date the designation is saved.
6. All beneficiary designations for a pending coverage become effective on the date the coverage becomes effective.
7. You may change your beneficiary designations at any time. You don't need to wait for an enrollment event.
8. To access your beneficiary information outside an enrollment event, click on **Your Profile --> Beneficiaries**.

\* The employee is the automatic beneficiary for spouse life and child life insurance.

Step	Action
1	<p><b>Designate/Change Beneficiaries During Annual Enrollment</b></p> <p>You will enter all beneficiary designations for the following plans through the Lilly Benefits Center website:</p> <ul style="list-style-type: none"> <li>• <b>Lilly Employee 401(k) Plan</b></li> <li>• <b>Retiree Death Benefit</b></li> <li>• <b>Flexible CarePLUS</b></li> </ul> <p>From the <i>Enroll in Your Benefits</i> screen, click on the benefit(s) for which you have coverage or are electing new coverage.</p> <p>After verifying your election, click <span style="border: 1px solid black; padding: 2px;">Continue</span>. You will be taken to the screen below.</p> <p><b>NOTE:</b> If you have already designated beneficiaries and want to make a change, click <a href="#">Choose a Beneficiary</a> under the specific benefit plan on the <i>Enroll in Your Benefits</i> screen. Then, click <span style="border: 1px solid black; padding: 2px;">Make Changes</span> to be taken to the screen below.</p> <p>All persons currently listed in your account at the Lilly Benefits Center will appear as potential beneficiaries. The list will be available when you are designating your beneficiaries for the 401(k) plan, death benefit and life</p>

# Annual Enrollment Job Aid-Retiree

insurance benefits.

Beneficiaries

## Verify Your Beneficiaries

Verify your **Retiree Death Benefit** beneficiaries on file.



**Note:** If you submitted beneficiary choices on paper before **06-01-2005**, your choices are on file but won't appear on this site unless you enter them again here.

### Retiree Death Benefit

Current Beneficiaries	Birth Date	Benefit %
<b>Primary</b>		
	06-29-1955	100%
<b>Contingent<sup>1</sup></b>		
	10-16-1987	Equal
	01-30-1992	Equal

<sup>1</sup>Contingent beneficiaries take effect only if all your primary beneficiaries die before you.

[Continue](#) [Make Changes](#)

**2**  
**(optional)**

### Add a Name to Your Beneficiary List

To add a name to your beneficiary list, use the drop down menu to select the **beneficiary type** and click **Add**. When entering an additional person, use the relationship code **Other**.

Gender  Male  Female  
Relationship **Other**

**NOTE:** If you need to enter a person who is a current or former Lilly employee, a Lilly retiree or currently covered by another Lilly employee or retiree, please contact the Lilly Benefits Center for assistance.



## Annual Enrollment Job Aid-Retiree

Step	Action																											
<b>3</b>	<p><b>Designate a Beneficiary</b></p> <p>--Indicate the beneficiary order by clicking in the circle under Primary or Secondary by each person you wish to designate.                      --Click <b>Continue</b>.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2">Name</th> <th rowspan="2">Birth Date</th> <th colspan="2">Beneficiaries</th> <th rowspan="2">Not a Beneficiary</th> </tr> <tr> <th>Primary</th> <th>Contingent<sup>1</sup></th> </tr> </thead> <tbody> <tr> <td><a href="#">Spouse Participant</a></td> <td>04-19-1965</td> <td style="text-align: center;"><input checked="" type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td><a href="#">Child Participant</a></td> <td>09-27-1995</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input checked="" type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td><a href="#">Child Participant</a></td> <td>06-24-1999</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input checked="" type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> </tbody> </table> <p><b>Add Beneficiary</b> <span style="border: 1px solid black; padding: 2px;">--Choose One--</span> <span style="border: 1px solid black; padding: 2px;">Add</span></p> <p><small><sup>1</sup>Contingent beneficiaries take effect only if all your primary beneficiaries die before you.</small></p> <p style="text-align: center;"> <span style="border: 1px solid black; padding: 2px 10px;">Continue</span> <span style="border: 1px solid black; padding: 2px 10px; margin-left: 20px;">Cancel</span> </p> </div>	Name	Birth Date	Beneficiaries		Not a Beneficiary	Primary	Contingent <sup>1</sup>	<a href="#">Spouse Participant</a>	04-19-1965	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<a href="#">Child Participant</a>	09-27-1995	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<a href="#">Child Participant</a>	06-24-1999	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>					
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<b>4</b>	<p><b>Determine Distribution of Proceeds Among Beneficiaries</b></p> <p>You may enter a specific percent within the "Benefit %" boxes for each beneficiary or "check the box" labeled "Equal %" to ensure each beneficiary receives the same amount.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Beneficiaries</th> <th>Birth Date</th> <th>Benefit %</th> </tr> </thead> <tbody> <tr> <td colspan="3"><b>Primary</b></td> </tr> <tr> <td>Spouse Participant</td> <td>04-19-1965</td> <td style="text-align: right;">100%</td> </tr> <tr> <td colspan="2"></td> <td style="text-align: right;"><b>Total 100 %</b></td> </tr> <tr> <td colspan="3"><b>Contingent<sup>1</sup></b></td> </tr> <tr> <td>Child Participant</td> <td>06-24-1999</td> <td style="text-align: right;"><input type="text" value="50 %"/></td> </tr> <tr> <td>Child Participant</td> <td>09-27-1995</td> <td style="text-align: right;"><input type="text" value="50 %"/></td> </tr> <tr> <td colspan="2">Distribute amount equally among contingent beneficiaries.</td> <td style="text-align: right;"><input type="checkbox"/> Equal %</td> </tr> <tr> <td colspan="2"></td> <td style="text-align: right;"><b>Total 50 %</b></td> </tr> </tbody> </table> <p><small><sup>1</sup>Contingent beneficiaries take effect only if all your primary beneficiaries die before you.</small></p> <p style="text-align: center;"> <span style="border: 1px solid black; padding: 2px 15px;">Choose and Continue</span> <span style="border: 1px solid black; padding: 2px 10px; margin-left: 20px;">Back</span> </p> </div> <p><b>Choose and Continue</b> - If you are satisfied with your designations, click to confirm your designations and return to the <i>Enroll in Your Benefits</i> screen.</p> <p><b>Back</b> - If you want to make changes to your designations, click to return to the previous screen.</p> <p><b>Note:</b> For coverage currently in force, all beneficiary designations and changes are effective immediately. For coverage pending approval from AUL, the designations are effective on the day the coverage becomes effective.</p>	Beneficiaries	Birth Date	Benefit %	<b>Primary</b>			Spouse Participant	04-19-1965	100%			<b>Total 100 %</b>	<b>Contingent<sup>1</sup></b>			Child Participant	06-24-1999	<input type="text" value="50 %"/>	Child Participant	09-27-1995	<input type="text" value="50 %"/>	Distribute amount equally among contingent beneficiaries.		<input type="checkbox"/> Equal %			<b>Total 50 %</b>
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