

## ADD BENEFICIARY

From the **Benefits** worklet:

1. Click **Benefits** under Change.
2. Complete the following fields and then click **Submit**.
  - a. In the **Change Reason** field, select Beneficiary Change.
  - b. In the **Benefit Event Date** field, select Today's date.
3. Press **Submit**.
4. A box will appear in the middle of your screen that says, "You have submitted – Up Next: Employee's Name, Change Benefit Elections and it will include a Due Date'. Press **Open** under this message.
5. Click "**Let's Get Started**"
6. Click **Manage** under the plan you intend to on managing beneficiaries for.
7. Click **Confirm and Continue**.
8. On the Beneficiary Designation screen, click the **Plus icon** to add a Beneficiary.
  - a. Click the blank row that appears and select **Add New Beneficiary or Trust**.
  - b. Choose to select **Add New beneficiary** or **Add New Trust**, then press **Continue**.
9. On the Add Beneficiary screen, complete the following mandatory fields and then click **OK**.
  - a. Using the prompt, select the **Relationship** of the Beneficiary.
  - b. Enter the Beneficiary's **Legal Name** under the Legal Name tab.
  - c. Under the Contact Information tab, enter the **Primary Address** and **Primary Phone** for the new Beneficiary. You can select an existing address and phone number if the same.
  - d. Under the Usage tab, enter the **Type** by selecting either Home or Work and then click **OK**
10. Once you have clicked Ok, you will then be directed back to the Beneficiary Designation screen. The new Beneficiary will populate in the Beneficiary field. Select the percentage distribution. Click **Save**
11. A box will appear in the middle of your screen that says, "Your changes have been updated, but not submitted"
12. If you intend to make more change, then following instructions above #6-11. Once all changes have been made, click **Review and Sign**.
13. Carefully review the summary of your **Beneficiary Designations**
  - a. If your elections are correct, scroll down to the bottom of the page and check **I Accept** to provide an electronic signature confirming your changes.
  - b. If your elections are not correct, click Cancel and you will be brought back to the Beneficiary Change screen to make changes
14. Press **Submit**.

15. Click **View Benefit Statement** on your screen to print and save a PDF copy of your Elections Confirmation for your records, or click **Done**.

## EDIT BENEFICIARY

From the **Benefits** worklet:

1. Click **Beneficiaries** under Change.
2. Click the **Edit** button next to the existing Beneficiary whose information you wish to update.
3. Enter all appropriate information and then click **Submit**.