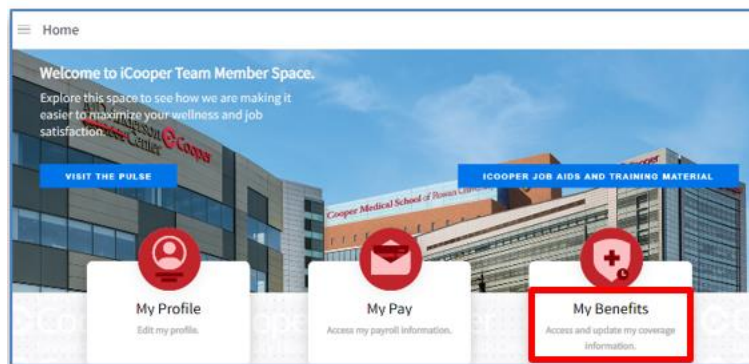# TIP SHEET
Human Resources

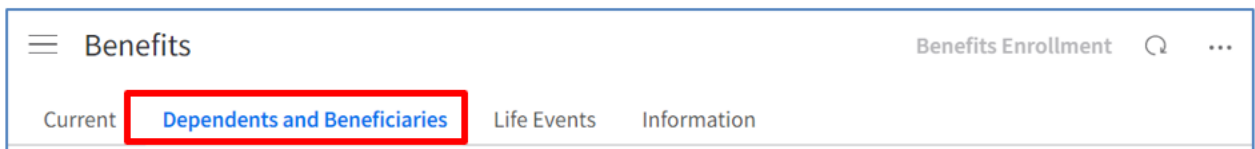**Purpose: *Add a Beneficiary and/or Designation in the Team Member Space***

This tipsheet is available to assist you with adding a beneficiary and a Designation on the Team Member Space.

Workflow

1. Click **My Benefits**.

2. On the **Benefits** page, select **Dependents and Beneficiaries** tab.

1. On the **Dependents and Beneficiaries** page, select **Add** under the **Beneficiaries** section.

2. Enter the **Name** fields.
   a. Provide the given **First Name**, **Middle Name**, and **Last Name** fields for the beneficiary using the name on most legal documents.

Add Beneficiary

Name

| First Name | Middle Name | Last Name |

☐ Additional Naming Options

3. Enter the fields in the **Personal Information** section.

   a. **Note:** For the **Relationship** field, select a predefined value, such as Child or Spouse.
   b. **Note:** Use the calendar icon to select a birthdate.

Personal Information

Relationship | Birthdate | Gender

4. Enter an **Identification Number.**

   a. **Note:** Complete the **Identification Number** field with information obtained from the beneficiary's government-issued identification document. For example, this could be a Social Security Number in the US.

Identification Number (SSN)

New Identification Number (SSN) | Country

US

5. Enter the applicable phone numbers for the beneficiary.

Telephone Numbers

Home Phone

Work Phone | Work Extension

6. Enter an email **Address** for the beneficiary.

Address

Email Address

Address

○ Other Address   ⦿ Same As Resource Residence Address   ○ Same As Resource Mailing Address

7. Specify the options for the mailing address.

   a. **Note:** If the beneficiary shares an address with you, then select **Same as Resource Mailing Address** or **Same as Resource Home Address**. Otherwise, select **Other Address**.

   b. **Note:** If you select **Other Address**, select a predefined value for the **Country** field, then complete the **Street Address** and **State/Province** fields. Complete the **Post Code**, **Region**, and **County/District** fields, if available.

Select the **Submit** button.

8. **Note:** The New Beneficiary is now displayed on the **Dependents and Beneficiary** Tab

Add a Designation to the Beneficiary

This will walk you through the process of adding a Designation to the Beneficiary through the Life Events tab on the Team Member Space.

Workflow

1. Click **My Benefits**, select the **Life Events** Tab

2. On the **Benefits** page, select the Life Events tab.

3. Select the **Update Beneficiary and/or Designations Create Event** button.

   a. **Note:** The Beneficiary as well as the Designation can both be updated here. If you have already added your Beneficiary to the Dependents and Beneficiaries tab, proceed with the Designation only.

4. . Enter the date of the event in the **Event Date** field and then **Submit**.

5. The system will take you through a list of steps that may be needed to complete the Navigation pane of the life event.

6. Read and follow the directives on the **Instructions** tab of the Navigation Pane.

7. Advance to the next step by selecting the **Next** button or scrolling down the list of steps.

8. On the **Beneficiary Update** tab, click the **Designate Beneficiary** tab and check the box of the **Beneficiary** that you would like to update.

You will need to indicate whether the Beneficiary is **Primary** or a **Contingent** and then assign a percentage
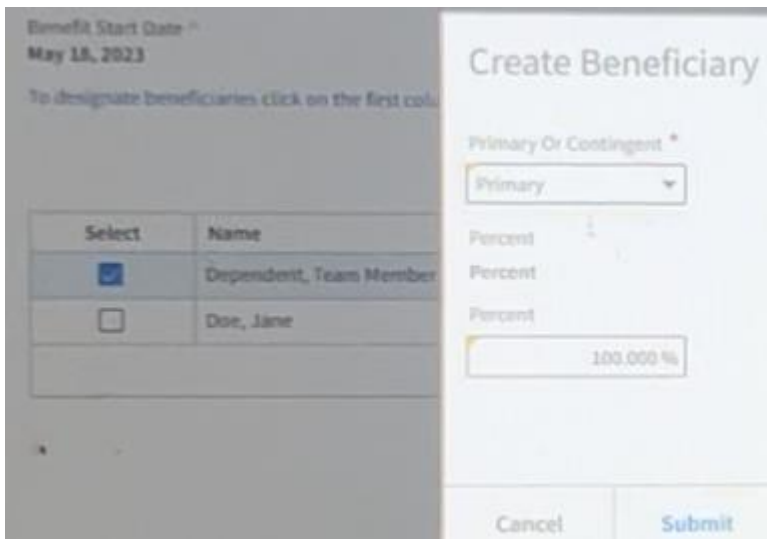
9. Click **submit**

    You should now see your updates reflected on the screen.

10. Click **Save and return to the Enrollment** tab in the upper right side of the screen

11. **Select the Review and Submit Changes** tab

12. To Submit your Enrollment, click **Submit**

Submit

Electronic Signature

Click submit to update your beneficiaries

☐ Agree To Enrollment Terms

Cancel | **Submit**

13. Click the box to agree to the terms

14. Click **Submit**

15. A confirmation screen will appear where you can click **View Confirmation** to review or print your changes

You have successfully added a Beneficiary and Designation