### Quick Reference Guide: Change Beneficiaries

#### Keep in mind
- You have 7 days to complete your beneficiary change.
- After 7 days, you will need to re-initiate the event.

#### Information Needed
- Please note that if you are modifying your beneficiaries or dependents you must provide social security numbers, dates of birth and addresses for those individuals.
- For more Benefit Plan information, please visit [humanresources.uchicago.edu/benefits](http://humanresources.uchicago.edu/benefits).

### Change Benefits Steps:

1. From the Home page, click the **Benefits** worklet.

2. Under the Change header, select **Benefits**. Do **NOT** select Beneficiaries or Dependents.
3. On the Change Benefits screen, select **Beneficiary Change** as the **Benefit Event Type** and enter **Today’s Date or a future date** as the **Benefit Event Date**.

4. Click on the **Submit Icon** to submit this task.
5. You will see the next task to complete. Click Open.

6. Your current life insurance elections will display, however you will not be able to edit them. Click the **Continue Icon**

7. For the Benefit Plan you would like to add a beneficiary, click the **Add Icon** in the Beneficiary column to add a beneficiary. In the new row, click on the **Prompt Icon** and select **Beneficiary Persons** or **Trusts** to see a list of Beneficiaries available. If the person is listed, click the button next to their name to select them as a beneficiary. Enter the Primary or Contingent Percentage for the beneficiary.

   If adding more than one beneficiary to a benefit plan, click the **Add Icon** to repeat this process.
8. If the person you want to add as a beneficiary is not listed in the Beneficiary Persons or Trusts categories, you can create a new beneficiary. To do so, click on the **Prompt Icon** :page:️, click on **Create** and select **Add Beneficiary**, **Add Beneficiary Using Existing Contact** or **Add Trust**.

**For Add Beneficiary**

- In the **Relationship** row, click on the **Prompt Icon** :page:️ to select the **Relationship** type.
- **Use as Beneficiary** will automatically be selected (no action needed).
- **Date of Birth, Gender, Full-time Student** and **Disabled** are not required fields but should be inputted if applicable.
- On the **Legal Name** tab, input the **First Name** and **Last Name** of the beneficiary. The **Country** will default to **United States of America** and should not be changed.

- On the **Contact Information** tab, under the **Address** section click the **Add Icon** and enter the address information of the beneficiary, including Type. If the beneficiary has the same address you do, you can click the **Prompt Icon** :page:️ in the **Use Existing Address** field and select your address instead.
For Add Beneficiary Using Existing Contact

- Click on the Prompt Icon for Existing Contacts to select from the list of available people. Click on the person’s name to select them then click the OK Icon.
- Verify the Relationship listed is accurate and make updates as necessary.
- Leave Use as Beneficiary checked.
- Date of Birth, Gender, Full-time Student and Disabled are not required fields but should be inputted if applicable.
- Review the Legal Name and Contact Information listed for the beneficiary and make updates as necessary.
- After reviewing your selections, click the OK Icon.

For Add Trust

- Enter the Trust Name. Trust ID and Trust Date are not required fields but should be inputted if applicable.
- Under the Trustee Contact Information, enter the First Name and Last Name of the Trustee. If there is more than one Trustee, click on the Add Icon to input additional names.
- Click on the Add Icon under Address to enter the address information of the beneficiary, including Type. If the beneficiary has the same address you do, you can click the Prompt Icon in the Use Existing Address field and select your address instead.

9. Once the beneficiary information is entered for the applicable benefit plan(s), click on the Continue Icon.
10. Review your **Beneficiary Change(s)** by clicking the arrow next to **Beneficiary Designations**.

11. Click the **I Agree** checkbox to confirm your selections.

12. Click on the **Submit Icon** to submit this task.

13. Scroll to the bottom of the screen and click the **Print Icon** to print a paper copy of your benefits for your personal records or click **Done Icon** to exit.