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.

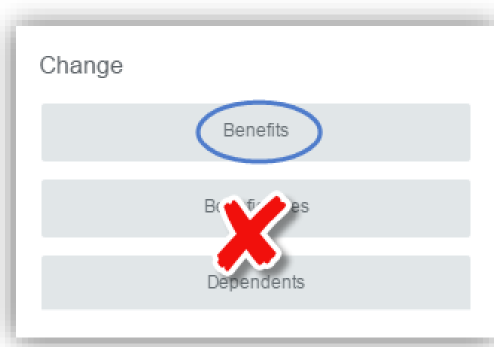
Information Needed

- 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.

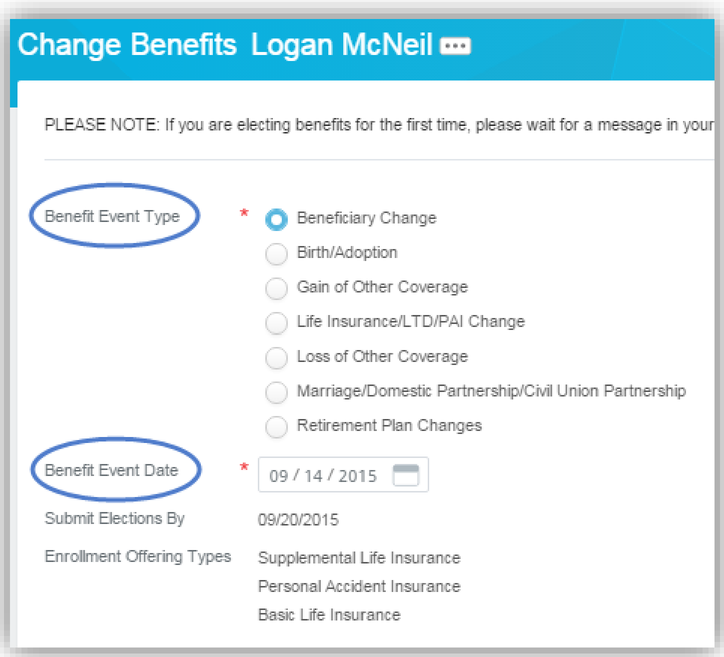
Change Benefits Steps:

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**.

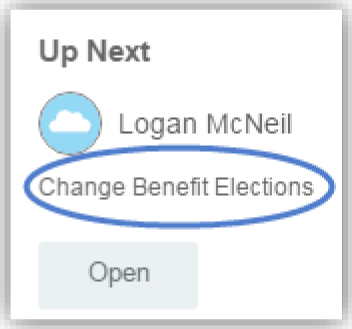


Values in the **Submit Elections By** and **Enrollment Offering Types** will populate based on your selections above.

4. Click on the **Submit Icon** 

to submit this task.

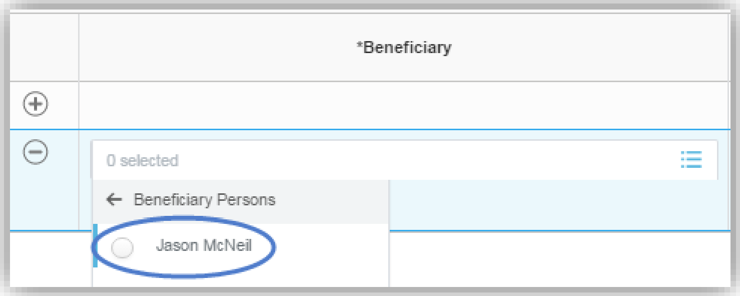
5. You will see the next task to complete. Click **Open.**



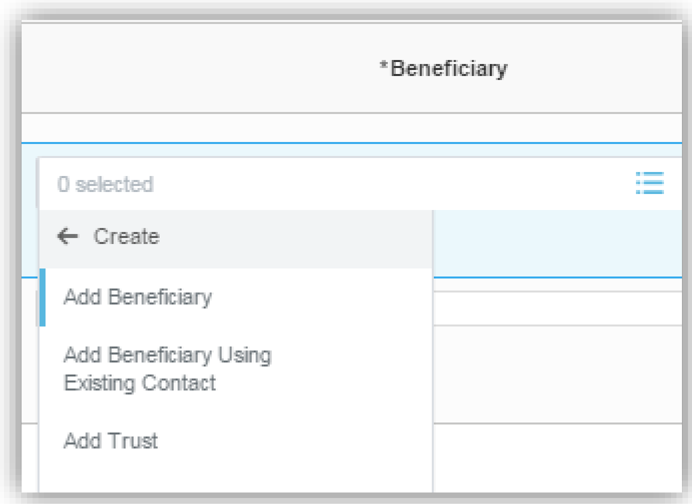
6. Your current life insurance elections will display, however you will not be able to edit them. Click the **Continue Icon**

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 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**, click on **Create** and select **Add Beneficiary**, **Add Beneficiary Using Existing Contact** or **Add Trust**.



<u>For Add Beneficiary</u>

- In the **Relationship** row, click on the **Prompt Icon** 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** in the **Use Existing Address** field and select your address instead.

For Add Beneficiary Using Existing Contact

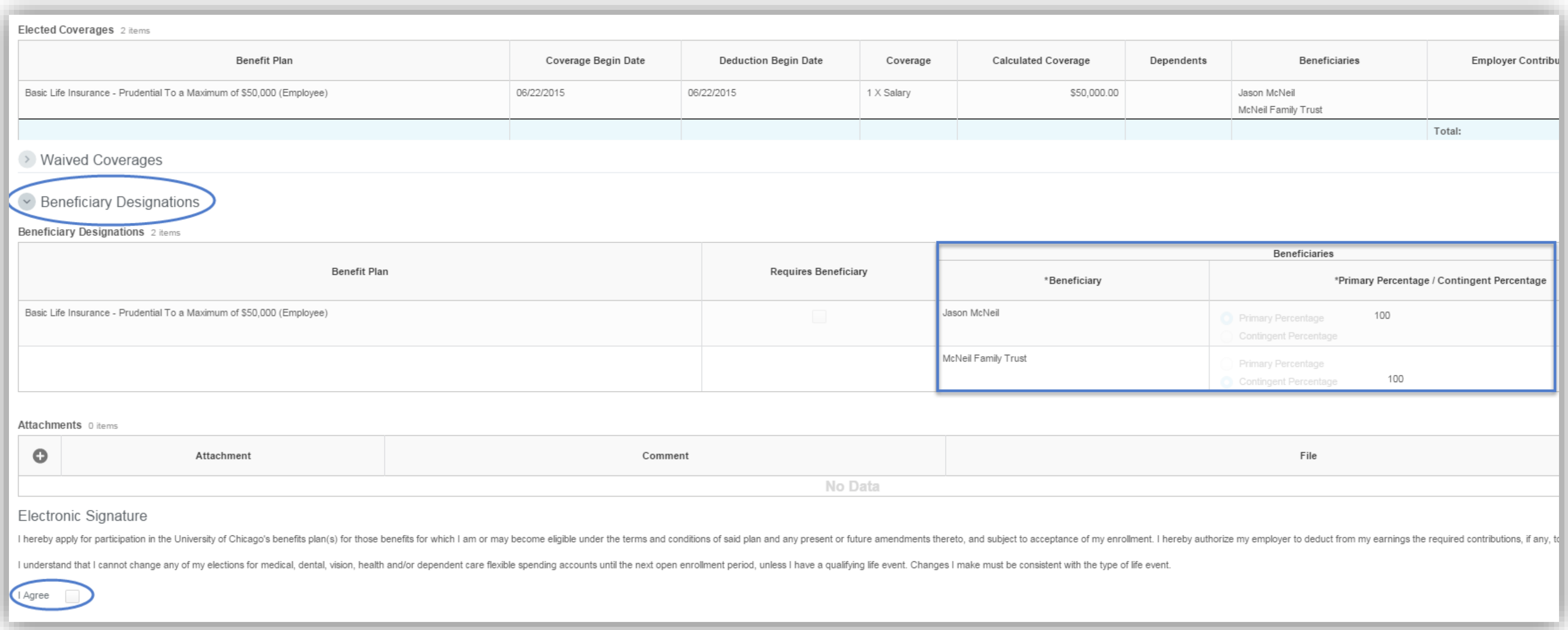
- Click on the **Prompt Icon** for **Existing Contacts** to select from the list of available people. Click on the person's name to select them then click the **OK Icon** OK.
- Verify the **Relationship** listed is accurate and make updates as necessary.
- Leave **Use as Beneficiary** checked.
- **Date 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** OK.

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** Add to input additional names.
- Click on the **Add Icon** Add 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** Continue**.**

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** Submit to submit this task.

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