

AutoEnroll

Update Beneficiaries

1. From the member's record, select Edit/Term, then select Beneficiary from the BASIC INFO drop down:

▼ BASIC INFO
Examples:
Change of Address
Change of Beneficiary

► LIFE EVENT
Examples:
Marriage/Divorce
Birth/Death

► ADMINISTRATION
Examples:
Administrator Correction
Administrator Override

Beneficiary

2. Select "Continue" in the popup window to assign the current date to the change, then select Edit on the next screen. Selecting View Details will expand details for existing beneficiary information.

▼ Beneficiary Information

Basic Life Edit

Name	Designation	Allocation
Child	Primary	100.00%

3. From the Beneficiary Information Screen, you can change the designation or allocation on existing beneficiaries or add a beneficiary or trust.

Beneficiary Information

Basic Life Designation

Name	Designation	Primary Allocation	Contingent Allocation	
Child	Primary	100	%	Edit

Allocation Totals
Each allocation type must sum to 100%

Primary 100%
Contingent 0%

+ Add New Beneficiary

3. Ensure that each allocation (Primary and Contingent) totals 100%, then click Next.

Beneficiary Information

Basic Life Designation

Name	Designation	Primary Allocation	Contingent Allocation	
Child	Primary	100	%	Edit
Jane Smith Stepdaughter	Contingent	100	%	Edit

Allocation Totals
Each allocation type must sum to 100%

Primary 100%
Contingent 100%

+ Add New Beneficiary

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4. On the following screen, click Approve. If you do not click Approve, your changes will not be processed.