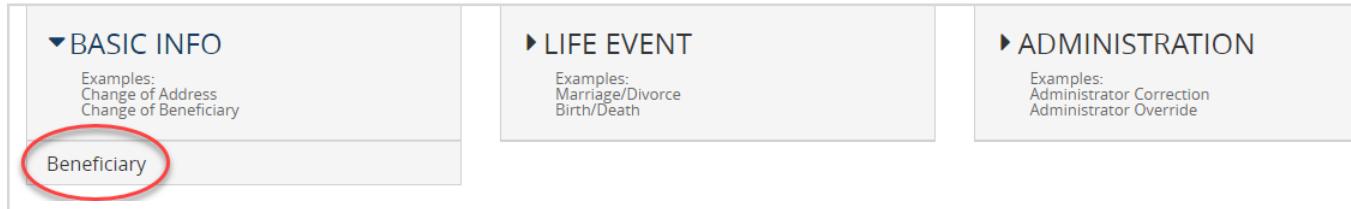


AutoEnroll

Update Beneficiaries

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



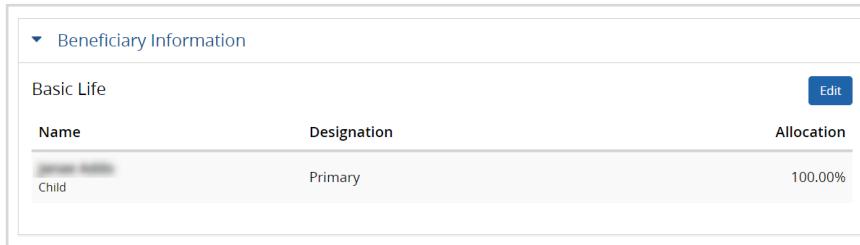
BASIC INFO
Examples:
Change of Address
Change of Beneficiary

Beneficiary

LIFE EVENT
Examples:
Marriage/Divorce
Birth/Death

ADMINISTRATION
Examples:
Administrator Correction
Administrator Override

- 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.



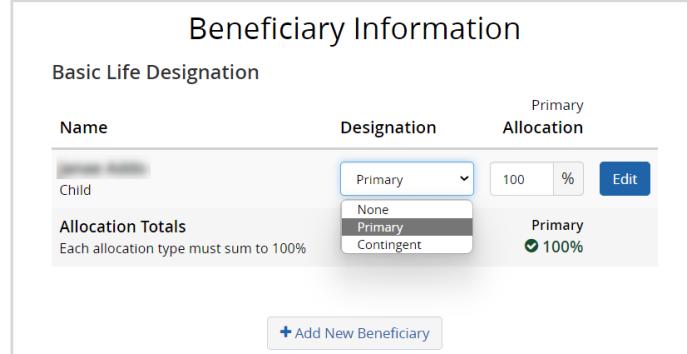
Beneficiary Information

Basic Life

Name	Designation	Allocation
Child	Primary	100.00%

Edit

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



Beneficiary Information

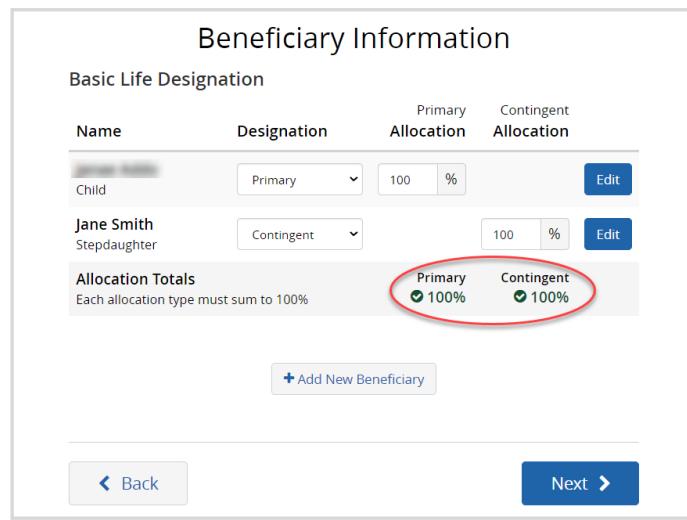
Basic Life Designation

Name	Designation	Primary Allocation
Child	Primary	100%

Allocation Totals
Each allocation type must sum to 100%

Add New Beneficiary

- 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%	
Jane Smith Stepdaughter	Contingent	100%	

Allocation Totals
Each allocation type must sum to 100%

Primary **Contingent**
100% 100%

Add New Beneficiary

Back **Next**