



# The University of Utah

PeopleSoft HCM

Beneficiary Designation Instruction Sheet

## Steps to add a New Beneficiary and changing allocations in eBenefits

- 1) From the eBenefits home page click on Insurance Plans. Choose a specific benefit plan, such as "Basic Life, Pt 1."
- 2) Click the Edit button in the Covered Beneficiaries section.
- 3) To add a new beneficiary, click the [Add a New Beneficiary](#) hyperlink. A message appears that says, "Please read instructions on 'How to add a new beneficiary' before you start this exercise." Click OK.

[Home](#) > [HR Self Service](#) > [eBenefits](#) > [Insurances](#) > **Change Beneficiary Allocations**

### Change Current Beneficiaries and Allocations

JASON SMITH 

**This page lists all the beneficiaries set up in the system.**  
 To change your allocations for your current beneficiaries, enter a percent in the new allocation column. An individual cannot be both a primary and a secondary beneficiary and the percent allocation should add up to 100. Click Add a New Beneficiary to add a new beneficiary.  
**All changes are effective the same day.**

Name	Relationship	New Primary Allocation	New Secondary Allocation
JULIA SMITH	Spouse	<input type="text"/>	<input type="text"/>
NANCY SMITH	Daughter	<input type="text"/>	<input type="text"/>
ANNA SMITH	Daughter	<input type="text"/>	<input type="text"/>
		<b>Total:</b>	0 0

[Click here for instructions on how to add a new beneficiary](#)  
[Add a New Beneficiary](#)

**Sign and Submit**

By clicking the Submit button, I understand that I am using my login user ID and password as electronic signature to consent to the beneficiary designations I just entered.

[Return](#)



# The University of Utah

PeopleSoft HCM

## Beneficiary Designation Instruction Sheet

4) On the "Dependent/Beneficiary Personal Information" page that opens, enter the necessary information for your dependent/beneficiary in the personal information section. First Name, Last Name, Gender, and Birthdate are required fields.

[Home](#) > [HR Self Service](#) > [eBenefits](#) > [Dependents](#) > **Dependent/Beneficiary Data**

### Dependent/Beneficiary Personal Information



Click Save once you have added your Dependent/Beneficiary's personal information.

**Personal Information**

**Prefix:**

**First Name:**

**Last Name:**

**\*Gender:**

**SSN:**  (Social Security Number)

**\*Relationship to Employee:**

**Middle Name:**

**Suffix:**

**Birthdate:**

**Address and Telephone**

**Address:**

**City:**

**State:**

**Country:**  UNITED STATES

**Postal:**

**County:**

**Phone:**

Same Address/Phone as Employee

\*Required Field

[Return](#)

- 5) Tab to the Address and Telephone section,
- If the dependent/beneficiary has the same address as you, click on the box next to Same Address/Phone as employee. This will automatically fill in the address and phone number information.
  - If the dependent/beneficiary does not have the same address as you, fill in the address and telephone information.



# The University of Utah

PeopleSoft HCM

## Beneficiary Designation Instruction Sheet

---

6) Click the Save button and you will see the message, "The save was successful." Click the OK button.

7) If you did not enter a birth date for the dependent, then you will see this message:



8) Click the OK button and you will see the message, "The save was successful." Click the OK button and this displays the information you just entered.

9) Click the [Return](#) hyperlink, which will take you back to the page where you started to add a new beneficiary. You will see the beneficiary you added in the list of beneficiaries. (If you would like to enter more Beneficiaries click on "Add a New Beneficiary" and begin from Step 4.)

**Please note:** If you misspelled a beneficiary's name or any information, you will not be able to go back and fix it. Please email the Benefits Department with sufficient information to correct the data.



[Home](#) > [HR Self Service](#) > [eBenefits](#) > [Insurances](#) > **Change Beneficiary Allocations**

## Change Current Beneficiaries and Allocations

JASON SMITH



**This page lists all the beneficiaries set up in the system.**

To change your allocations for your current beneficiaries, enter a percent in the new allocation column. An individual cannot be both a primary and a secondary beneficiary and the percent allocation should add up to 100. Click Add a New Beneficiary to add a new beneficiary.

**All changes are effective the same day.**

Name	Relationship	New Primary Allocation	New Secondary Allocation
JULIA SMITH	Spouse	<input type="text" value="100"/>	<input type="text"/>
NANCY SMITH	Daughter	<input type="text"/>	<input type="text" value="50"/>
ANNA SMITH	Daughter	<input type="text"/>	<input type="text" value="25"/>
NOAH SMITH	Son	<input type="text"/>	<input type="text" value="25"/>
<b>Total:</b>		100	100

[Click here for instructions on how to add a new beneficiary](#)

[Add a New Beneficiary](#)

### Sign and Submit

By clicking the Submit button, I understand that I am using my login user ID and password as electronic signature to consent to the beneficiary designations I just entered.

[Return](#)

10) Now that you have entered your Beneficiary's information you can choose the percentage of allocation. Enter the percentage (in whole numbers only) for Primary Beneficiaries in the "New Primary Allocation" box, or enter the percentage for Contingent Beneficiaries in the "New Secondary Allocation" box. All allocations for primary beneficiaries must equal 100%, and all allocations for contingent beneficiaries must equal 100%. For example, if you have only one Primary Beneficiary, you would enter "100" in the New Primary Allocation box. If you have three contingent (secondary) beneficiaries you will need to enter unequal amounts to reach 100 percent. For example, you will enter "33" for two contingent beneficiaries and "34" for the third contingent beneficiary;  $33 + 33 + 34 = 100$ . This will be the case for all odd numbers of beneficiaries.

11) After you have entered **all** the allocations click the Submit button at the bottom of the page. **(Every time you add a new beneficiary or make a percent allocation change, you need to reenter the allocations for all beneficiaries before you click on submit.)** You will get the message, "The Save was successful." Click "OK" and you're done!