



ADDING OR EDITING A BENEFICIARY

To add or edit/delete an employee's beneficiary:

- 1. Select **Employee Home Page** under the employee's Reviews section

Herman Munster [Add a note](#)

Employee Management Profile Update Benefits Benefits Summary Documents Timeline Integrations

Herman Munster 1
Bus Drivers (Staff)

Status

- ✓ HRIS required fields complete
- ✗ Benefits required fields complete
- ✓ EE-entered fields for enrollment complete

Manage Enrollments

- New Hire Enrollment: HR has 5 days left to complete or make changes to new hire enrollment. You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.
- Modify Current Enrollments
- Open Enrollment: The employee has 0 days available to complete open enrollment. Employee's last day to enroll: 04/07/2023. Unlock Open Enrollment to extend the window.
- Newly Eligible Enrollment: Employee is not eligible for any newly eligible benefits.

Notes

Tasks

- Incomplete: 0
- Complete: 0
- HR Pending: 0

Actions 1

- Terminate Employment
- Manage COBRA
- Unlock Open Enrollment
- Unlock New Hire Enrollment
- Set New Hire Complete

Reviews 1

- Employee Home Page**
- Employee Data Sheet
- Total Compensation Statement
- Employee Change Request History
- Change History

- 2. Click **Benefits** at the top of the page

DEMO Clark Company ← Herman Munster Home Profile **Benefits** Required Tasks Resources

Hello, Herman!
It's time to enroll.
You have 5 days left to complete your elections.

New Hire Enrollment Incomplete [Start](#)

[View Profile](#) [Document Library](#)



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3. Click **Beneficiaries** on the left navigation

The screenshot shows the 'Beneficiaries' page. On the left, a navigation menu is open with 'Beneficiaries' highlighted. The main content area is titled 'Beneficiaries' and contains a 'View Beneficiaries' section with a dropdown menu set to 'Current beneficiaries' and an 'Edit Beneficiary' link. Below this is a table with the following data:

Benefit	Classification	Percentage	Name	Relationship	Sex	DOB	Phone
Voluntary Life	Primary	100.00%	Lily Munster	Spouse	F		

4. Click **Edit Beneficiary** and select the benefit to be updated

The screenshot shows the 'Beneficiaries' page with the 'Edit Beneficiary' button highlighted in yellow. A dropdown menu is open, showing 'Voluntary Life Beneficiary' as the selected option. The table below remains the same as in the previous screenshot:

Benefit	Classification	Percentage	Name	Relationship	Sex	DOB	Phone
Voluntary Life	Primary	100.00%	Lily Munster	Spouse	F		



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5. Use the highlighted selections to edit/remove or add a primary/contingent beneficiary

Primary Beneficiaries

[Add a beneficiary +](#)

	Name	DOB	Sex	Relationship	Allocation %	
Edit	Lily Munster		F	Spouse	100.00	remove

[Edit Percentages](#)

Contingent Beneficiaries

[Add a beneficiary +](#)