

Benefits (ESS): Add or Update a Beneficiary During Open Enrollment Using BearTrax

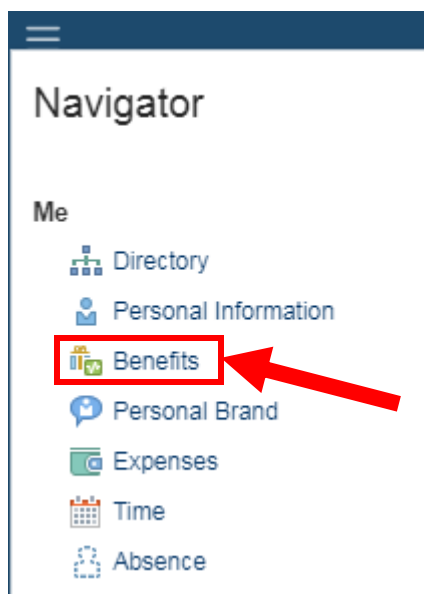
Introduction

Purpose: To add or update a beneficiary in Bear Trax during Open Enrollment.

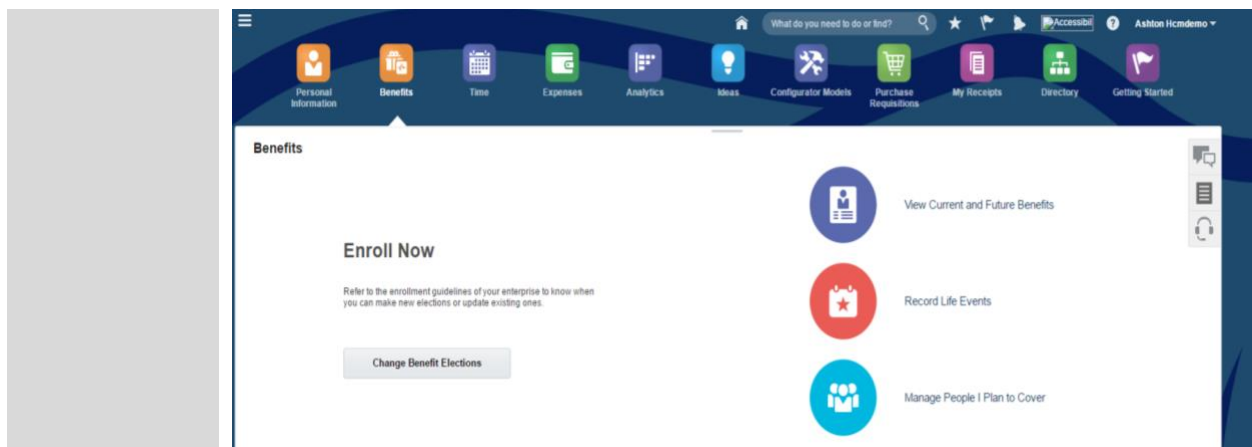
How to Access: Go to the [Home Screen](#) by clicking the  icon.

Click the  icon.

Under “Me,” click “Benefits.” This will take you to the Benefits screen.



From this screen, you can view, change, and update your beneficiaries while in the open enrollment period



Helpful Hints:

Be sure to keep in mind that...

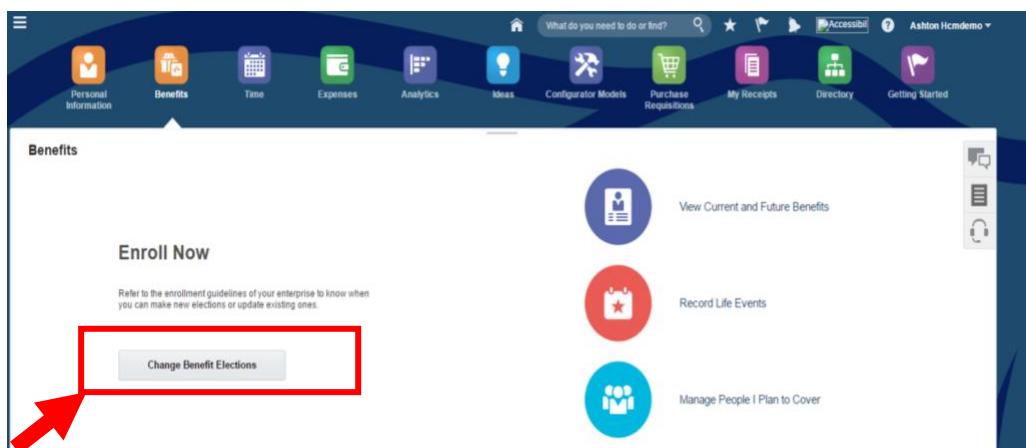
- Be sure to add family members and other beneficiaries as contacts in order to designate them as a beneficiary.
- In your Benefits pages, the term “Contacts” references your dependents and beneficiaries to be covered.

Procedure:

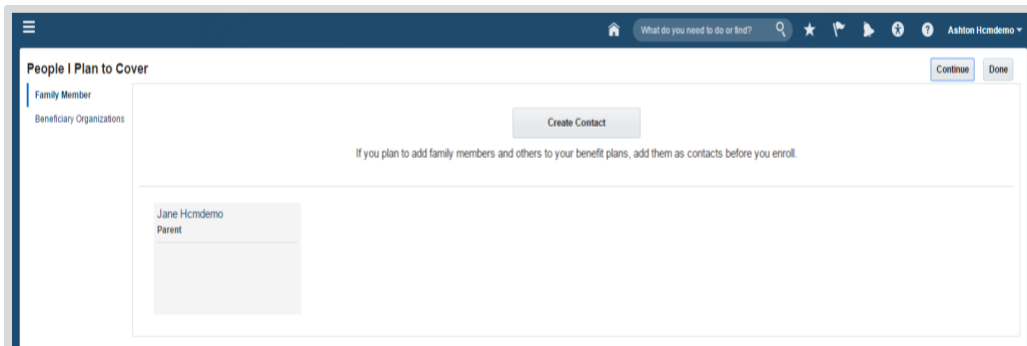
Complete the following steps to add or update a beneficiary.

Follow these instructions to add or update your beneficiaries.

1. Click “Change Benefit Elections.”



2. Edit your current contacts (dependents/beneficiaries) or add new contacts from here.

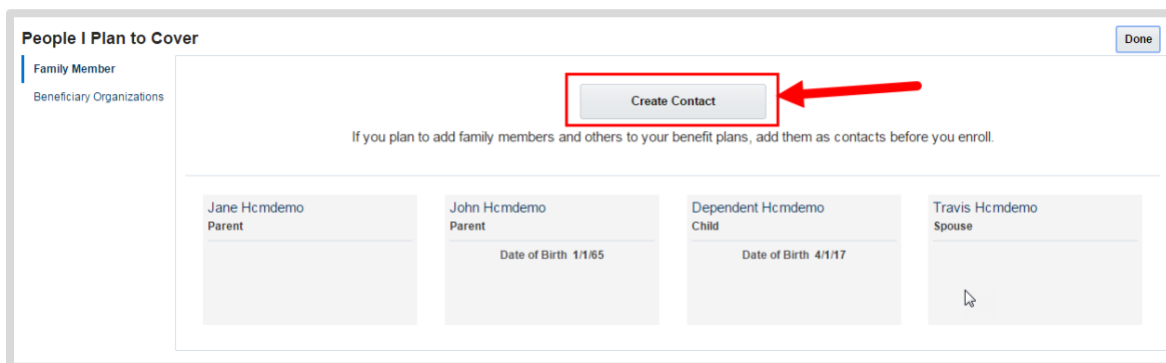


Create or Edit Contacts to add as a beneficiary

Follow these instructions to create or edit your contact for benefits coverage:

To create a contact:

1. Click "Create Contact" to add a family member as a dependent or beneficiary.



2. Enter all required information to create the contact if they do not already exist in your contacts.
 - a. Gender, Date of Birth, and National ID are required information for all Dependents.
 - b. Disability Status is required for Dependents 26 and older.
3. Complete all required fields below marked by *.

Create Contact

* Effective Start Date

Name Style

Global-Name Language

* Last Name

First Name

Title

Prefix

Suffix

Middle Name

Honors

Preferred Name

Previous Last Name

Marital Status

Gender

Date of Birth

Country

* Relationship

Emergency Contact

Address

Copy my home address

Enter a New Address

Primary E-Mail

Primary Phone

National ID

Student Status

Covered in Another Plan

Plan

Disability Type

Tobacco Use

Disability Status

4. Click "Save" at the top right corner.

5. **To update** contact information, click on the contact's name.

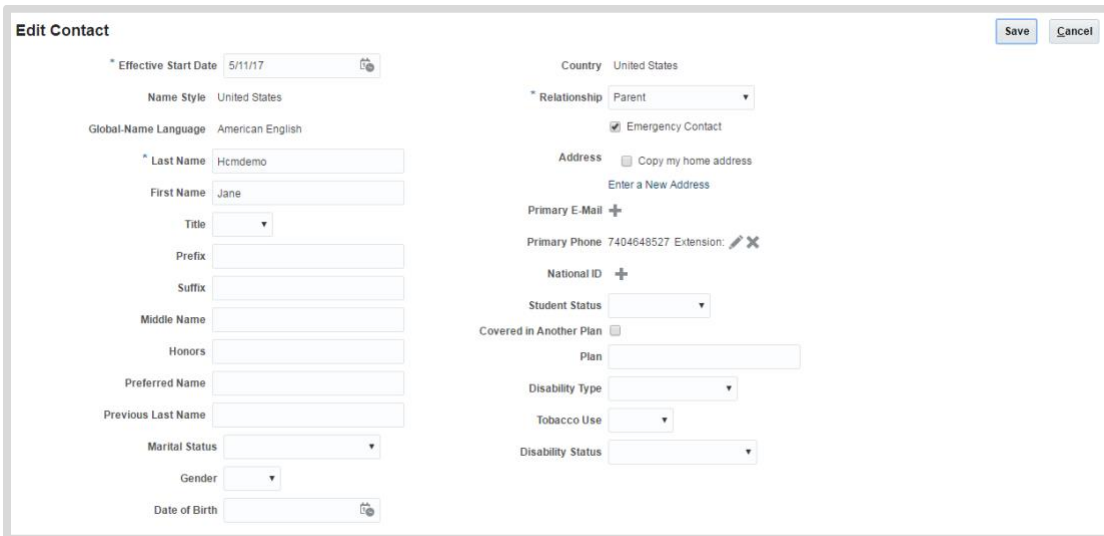
If you plan to add family members and others to your benefit plans, add them as contacts before you enroll.

<div style="border: 2px solid red; padding: 5px;"> <p>Jane Hcmdemo Parent</p> </div>	<p>John Hcmdemo Parent</p> <p style="font-size: x-small;">Date of Birth 1/1/65</p>	<p>Dependent Hcmdemo Child</p> <p style="font-size: x-small;">Date of Birth 4/1/17</p>	<p>Travis Hcmdemo Spouse</p>
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1. Fill out the required fields, as marked by an *.

a. If *current* data is incorrect, contact Human Resources to update.

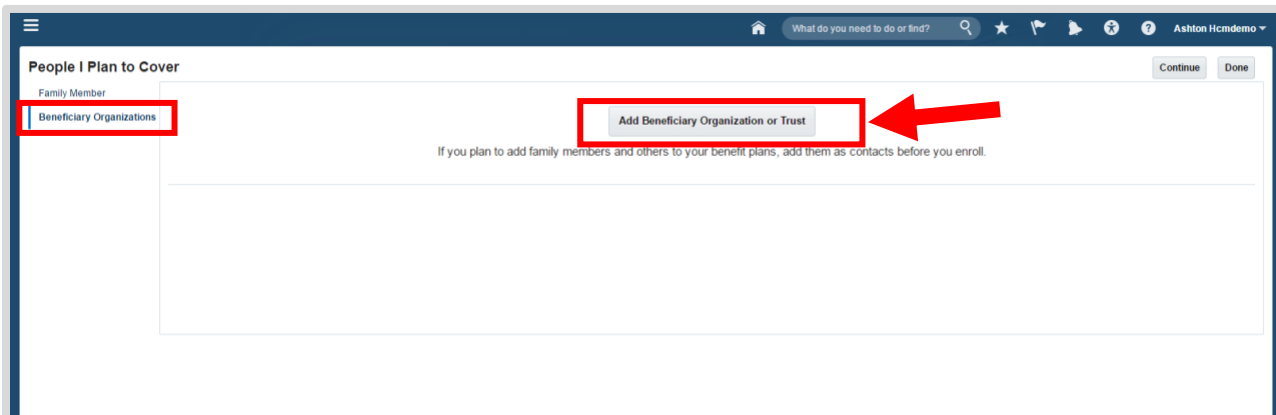
b. Any changes made to information for contacts will be effective from the date submitted.



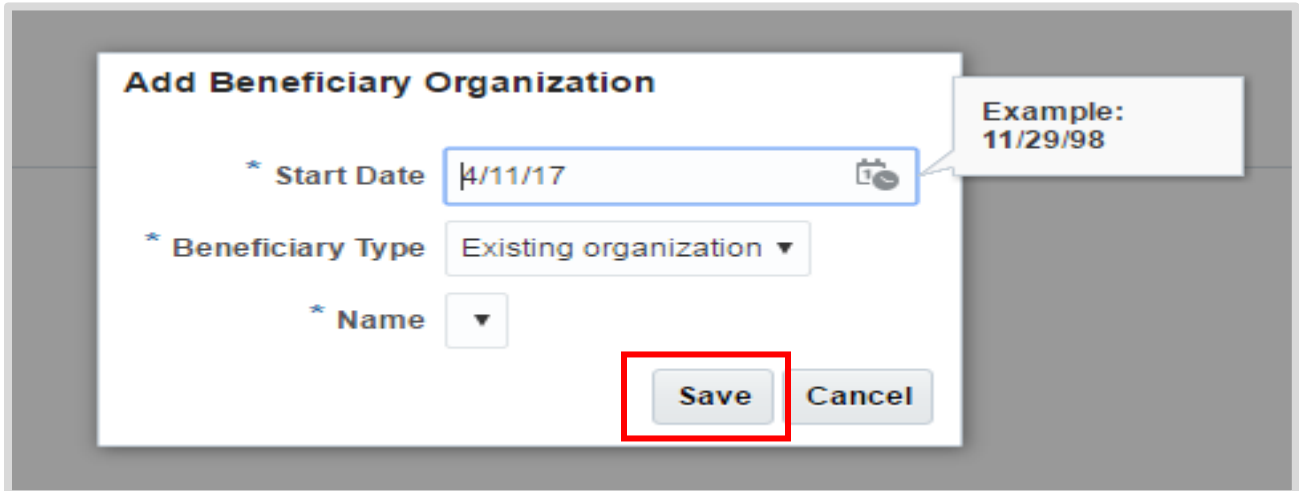
2. Click "Save."
3. If you wish to add a Trust/Estate as a beneficiary, click the Beneficiary Organization link on the left side of the screen.

Edit Beneficiary Organizations


1. Click "Beneficiary Organizations" on the left side of the screen.
2. Click "Add Trust/Estate" to begin the steps to add a new Beneficiary.



3. Enter the Start Date in the appropriate format.



Add Beneficiary Organization


* Start Date  Example: 11/29/98

* Beneficiary Type ▼

* Name ▼

- a. Select the Beneficiary Type.
 - i. If you are entering an Existing Organization:
 1. Choose the Name from the drop-down menu displayed.
 2. Click “Save.”
- b. If you are entering a Trust/Estate:

Add Beneficiary Organization

* Start Date 

* Beneficiary Type ▼

* Trust Name

Trust Registration

Trust Executor

Trust Additional Details

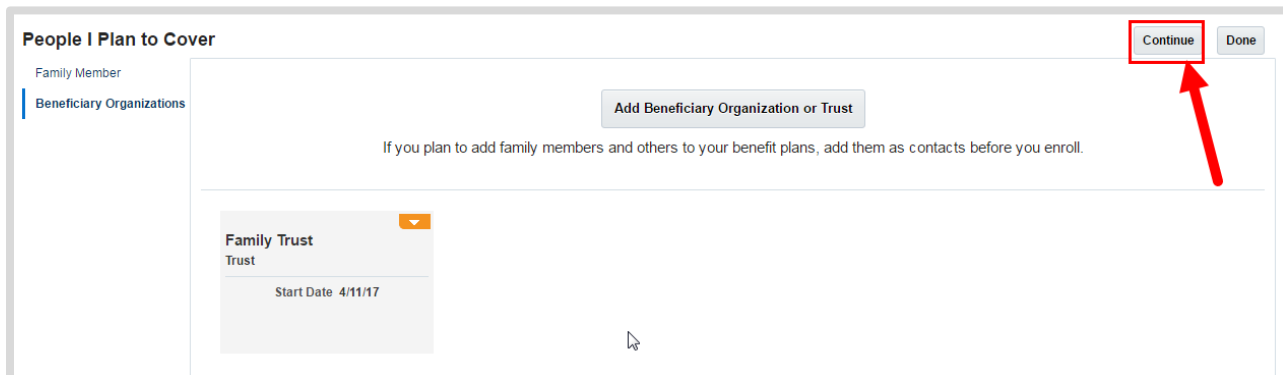
Trust Description

1. Enter information into the required fields.
2. Click "Save."

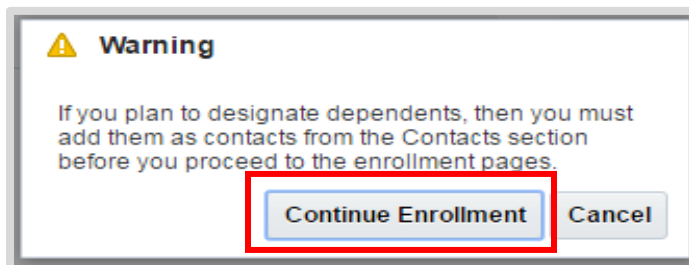
Note: If you wish to designate a contact as a beneficiary of your benefit elections, you must go through the Change Benefit Elections process to designate them as a beneficiary. *This can only occur during annual enrollment periods or when you report a life event.*

Designate Beneficiary

1. Click “Continue” to proceed through the Change Benefit Election process to designate your beneficiary.



2. Click “Continue Enrollment” in the warning box if you have already entered your dependents in the contacts section.

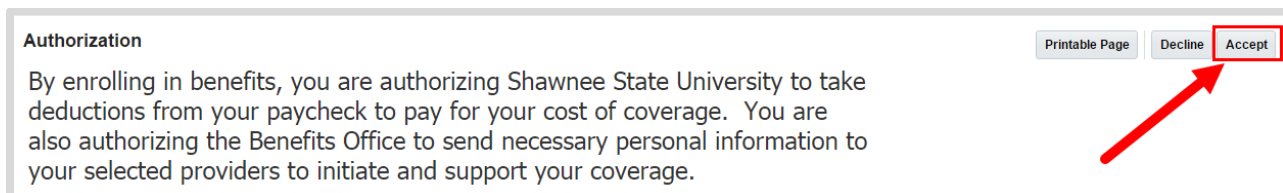


3. Note: The authorization statement notifies all employees that:

By enrolling in benefits, you are authorizing Shawnee State University to take deductions from your paycheck to pay for your cost of coverage. You are also authorizing the Benefits Office to send necessary personal information to your selected providers to initiate and support your coverage.

If you disagree with this statement, you cannot proceed to designate your beneficiary.

4. Click “Accept” to continue.




- Click "Next" through the Medical, HSA, FSA, Employer Paid, Voluntary Life and ADD, and Disability screen until you reach the "Designations" screen.

ADD

Edit Benefits: Medical Back **Next** Submit Cancel

Currency USD

Your Total Cost 364.64	PPO Plan Single	54.75 Employee Per Pay Perio...	Select
	PPO Plan Employee + Spouse	109.50 Employee Per Pay Perio...	Select
	PPO Plan Employee + Child	109.50 Employee Per Pay Perio...	Select



- Enter the primary and contingent percentages in the boxes provided.

Beneficiaries

Name	Relationship	Primary Beneficiaries (%)	Contingent Percentage (%)
▲ Basic Life and AD&D			
Corey Johnson	Spouse	<input type="text"/>	<input type="text"/>
▲ Voluntary Life and AD&D - Employee			
Corey Johnson	Spouse	<input type="text"/>	<input type="text"/>

- Click "Next" to proceed to the Review page.

- Review your beneficiary designations and click “Submit.”

Dependents				
Name	Relationship	Coverage Start Date		
No dependents designated.				
Beneficiaries				
Name	Relationship	Coverage Start Date	Primary Beneficiaries (%)	Contingent Percentage (%)
No beneficiaries designated.				
<p>▲ Authorization</p> <p>By enrolling in benefits, you are authorizing Shawnee State University to take deductions from your paycheck to pay for your cost of coverage. You are also authorizing the Benefits Office to send necessary personal information to your selected providers to initiate and support your coverage.</p>				

Note: To add additional beneficiaries, you must go back through the Change Benefit process.

Final Notes

By following these steps, you have successfully added or updated a beneficiary in BearTrax.