Add/Edit Beneficiary Information in HR Connect

Before you start make sure you have the following details available –

- Adding a person as beneficiary you **MUST** have their First and Last Name and Date of Birth
  - more details such as SSN and phone number are helpful, but not required
- Adding a charity or trust as the beneficiary you **MUST** have the name of the charity organization or trust
  - more details such as tax ID, address, phone number, etc. is helpful, but not required

Let's get started!

Begin by logging into HR Connect

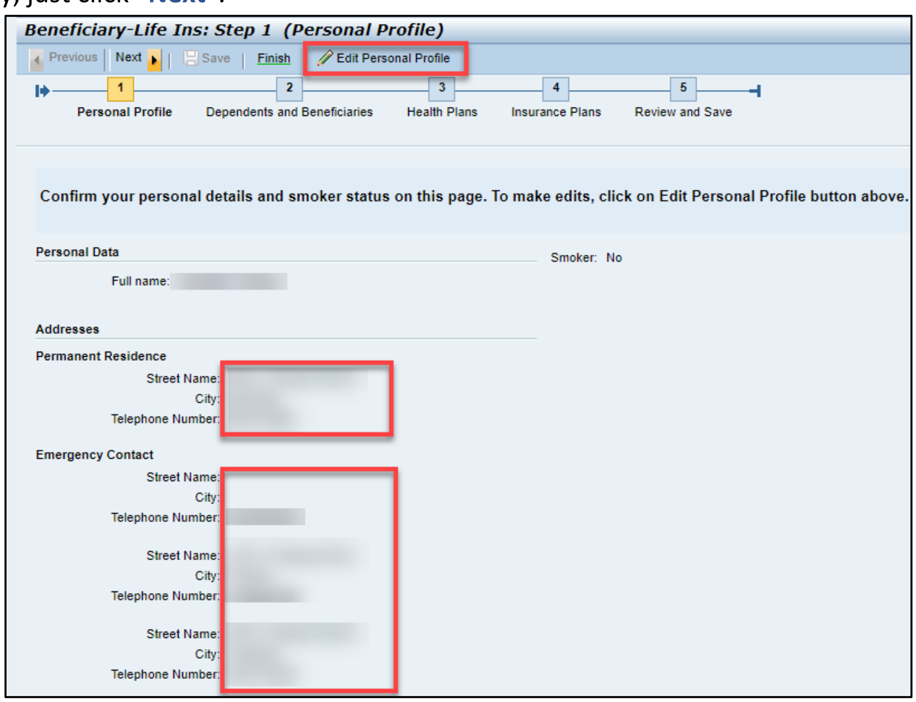
Do you need help logging in? Forgot your password?

- Store/DC hourly associates – Follow the OKTA instruction attachment.
- PHO/DC exempt associates – Contact the Service Desk at 800-406-2155 or 623-587-2155.

Select "**Benefits**" and then select "**Add Beneficiary for Life Insurance**" on the right side of screen.

Step 1: Verify your personal details and emergency contacts. Optional, but highly recommended. Click the "**Edit Personal Profile**" at the top of the page to edit personal details or emergency contacts.

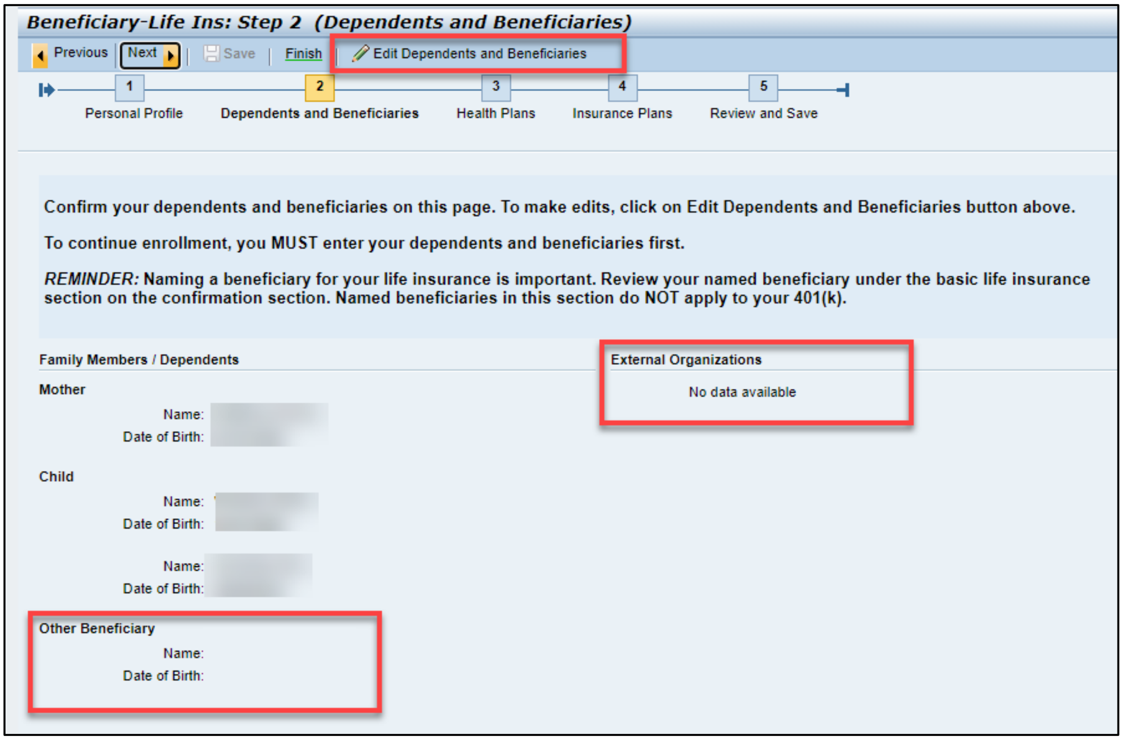
No changes necessary, just click "**Next**".



Step 2: Check your beneficiary details by looking under Other Beneficiary and/or External Organizations. To make edits or to add a beneficiary click on "**Edit Dependents and Beneficiaries**".

Click on "**Add**" to enter a person, trust or organization for your beneficiary. A beneficiary can be anyone the you choose—spouse, friend, parent, child, or charitable organization or trust.

Click the pencil icon to edit existing Beneficiary information.



Do **NOT** change your dependents during this process.

Adding a person select "Other Beneficiary" from the dropdown list and enter their First and Last Name and Birthday.

- More details such as SSN and phone number are helpful, but not required

Adding a charity or trust select the appropriate option from the dropdown list and enter the name of the charity organization or trust.

- More details such as tax ID, address, phone number, etc. is helpful, but not required

Click on "**Save and Back**" after changes are made. Save and Back

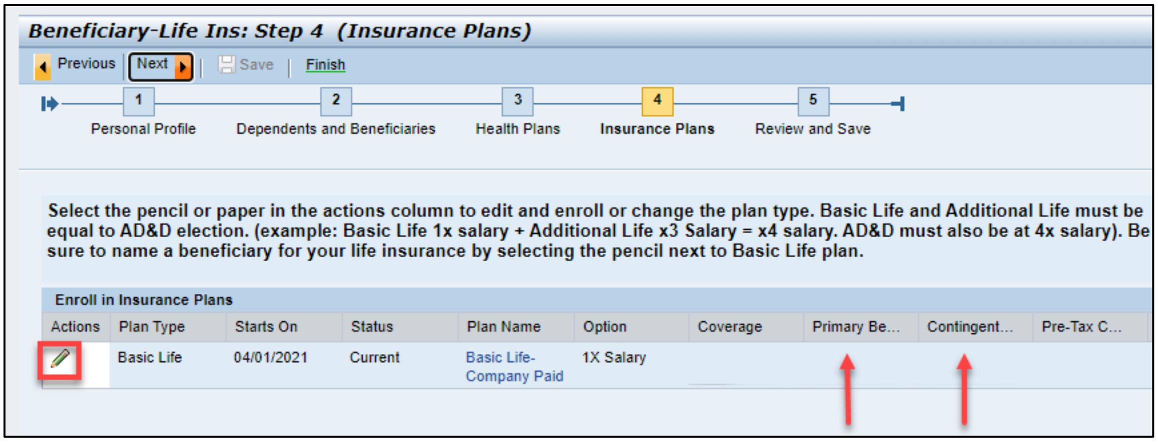
Click "**Next**"

Having a named beneficiary on this screen is <u>only one part of the process.</u> Keep going!

Step 3 – Medical Plans – SKIP this step – you cannot make changes to this section at this time.

Step 4: On this page you will add or edit the designation percentage for any beneficiaries you have designated. Current named beneficiaries will show under the Primary and Contingent columns.

Click the pencil icon to edit existing Beneficiary information.

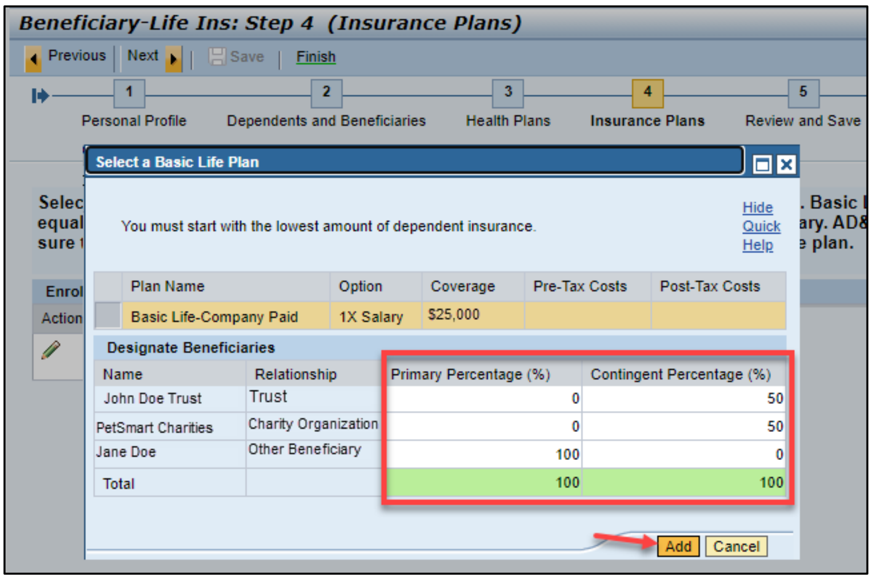


A new window will open and ask for your designation percentages for beneficiary listed.

Primary Beneficiary receives life insurance proceeds first. If the Primary has died, then Secondary Beneficiary receives proceeds.

When adding percentages each column must add up to 100 (in the green boxes).

Click “**Add**” after you’ve entered your percentages. The small window will close.



Click “**Next**”

Final step – click “**SAVE**”