




Beneficiaries

Once the employee has enrolled in their benefits, it's time to add their beneficiaries. To add beneficiaries, employees will follow a two-step process:

1. Manage the Beneficiaries
2. Designate the Beneficiaries

Step 1: Manage Beneficiaries

To learn more about the process of managing beneficiaries, click each of the hotspot icons () on the image below. *You can also use the button in the top right corner of the image to open it in fullscreen. Press the Escape key on your keyboard to exit fullscreen.*

City:

State:

Postal Code:

Phone:

Gender:

Date of Birth:

Social Security No:

nine digits - no dashes or spaces

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Step 2: Beneficiary Designations

Once beneficiaries are added and the employee signs and moves onto the next page, they are able to complete the second step. Here, employees make their beneficiary designations. Depending on your company, they can designate beneficiaries for all products or one product at a time.

Designating Beneficiaries for All Products:

When designating beneficiaries once for *all products*:

- Employees will see the primary and contingent beneficiaries change for each product as they are typed in
- Points should appear under the benefit that will be utilized when distributing amounts
- Points will be marked green when all qualifications are met, as shown below

Beneficiary Name	Primary % 	Contingent % 
HUBster, Taylor [Spouse]	<input type="text" value="100"/>	<input type="text" value="0"/>
HUBster, Brandi [Child]	<input type="text" value="0"/>	<input type="text" value="0"/>
HUBster, Trent [Child]	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	100 %	0 %

- Primary % total must equal 0 or 100
- Contingent % total must equal 0 or 100 (must be 0 if Primary % is 0)
- Each entry must be between 0 and 100
- A beneficiary is not both Primary and Contingent for the same benefit

Designating Beneficiaries for One Product at a Time:

When designating beneficiaries for *one product at a time*:

- Employees may see that some carriers may not allow certain types of beneficiaries
 - In this case, employees will be unable to see that beneficiary as an option

To learn more about limited beneficiaries, click on the hotspot icons () on the image below.

You can also use the button in the top right corner of the image to open it in fullscreen. Press the Escape key on your keyboard to exit fullscreen.



Employee Life [optional] View Limited Beneficiary Types



Beneficiary Name

HUBster, Taylor [Spouse]

HUBster, Brandi [Child]

HUBster, Trent [Child]

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- **Primary % total must equal 0 or 100**
- **Contingent % total must equal 0 or 100 (must be 0 if Primary % is 0)**
- **Each entry must be between 0 and 100**
- **A beneficiary is not both Primary and Contingent for the same benefit**

Once employees enter all the information, they can then save the page by clicking 'Finished'. At this point, a copy of the beneficiary information will be saved for historical purposes.