

Change in Beneficiary Life Event

Beneficiaries can be updated at any time throughout the year. To make these changes you will log into your Ultipro account (n14.ultipro.com) – if you do not know your username and/or password you can contact HR at 801.583.2787 x2182.

Step One: Updating Contacts

- Check your contacts (Menu > Myself > Contacts) – your contact list is the list of people you have the choice to choose from. You will want to make sure that the person you want to be your new beneficiary is on this list and their designation beneficiary box has a check mark

Designation

Beneficiary

- If you need to edit your contacts please click on their name that is linked blue > click the edit button in the top right corner and you will be able to edit and update their contact information and check the correct designation box. Click save.
*keep in mind that checking this box does **not** mean they are assigned as a beneficiary
- We cannot remove anyone from this list who is currently attached to a benefit or has a percent assigned to them as a beneficiary. If you are wanting to remove anyone. You will have to wait until you have assigned a new beneficiary in Step Two.
- All changes will pend for an approval. Once they are approved (usually 24 hrs) you can move on to the next step.

Step Two: Changing your beneficiaries

- In Ultipro you will go to “Life Events” (Menu > Myself > Life Events)
- Click on the life event that says “I would like to change my beneficiaries” (if you have multiple click on the one with a “not started” or “in progress” status.
- You will put in the date and click the drop-down box and select “change in beneficiary”
- Click the next circle in the top right
- Here you will **verify** that your new beneficiary is listed. (Changes cannot be made here; you must do this in the contacts section)
- Click the next circle in the top right
- Check the amount you are insured in the upper right-hand corner (voluntary life and accident only)
- Remember you can only change your beneficiaries in this module – not the amount you are insured in.

- Click the circle next to the plan and enter the exact amount that is listed in the upper right corner into the box in the center of the screen (only on voluntary life and accident)
- Next you will reassign your beneficiary
 - check mark the box next to the person you would like to be your new beneficiary
 - click the primary or secondary box (secondary means: who gets the funds if the primary is not able to receive funds)
 - assign them a percentage amount – this amount will need to equal 100% in each column

Basic Term Life Insurance 50000

\$0.00 Biweekly*

Coverage start date*: 10/14/2020

**Estimated values*

 **Enroll Beneficiaries**

Name	Primary	Secondary
<input checked="" type="checkbox"/> Test Family	<input checked="" type="radio"/> 100 100.00 %	<input type="radio"/> <input type="text"/> 0.00 %

You will continue selecting a beneficiary for each benefit (Basic Term Life, Voluntary Life, AD&D) until you get to the 'Confirm Your Elections or Changes' page.

Click on the green submit button to complete.