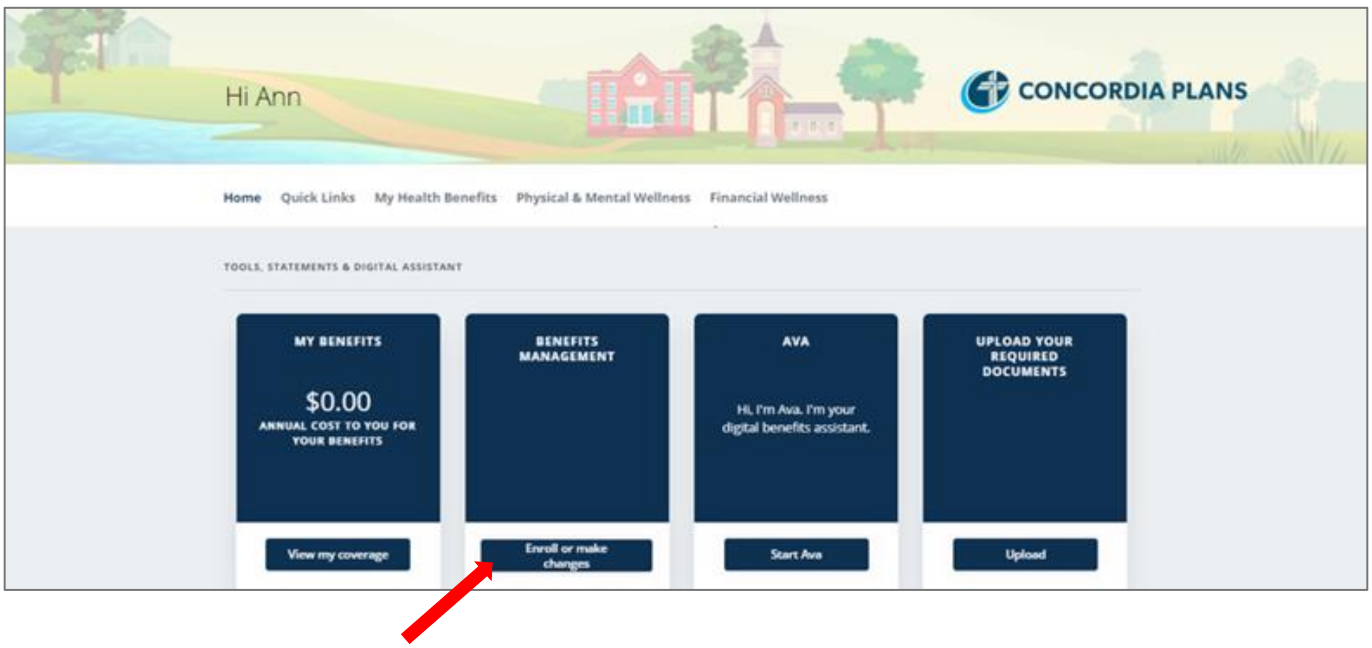
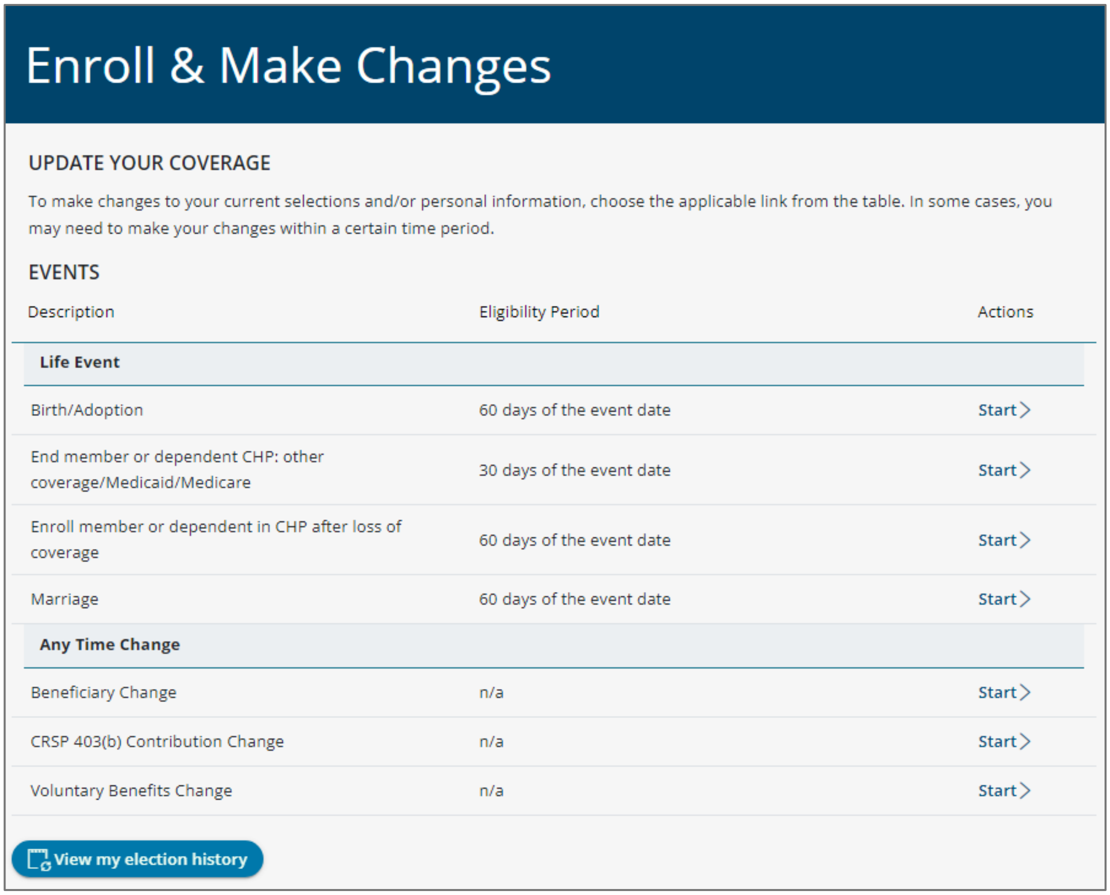
Beneficiary Designation

Log in to your Member Portal, and follow these steps to add or update your beneficiary information.

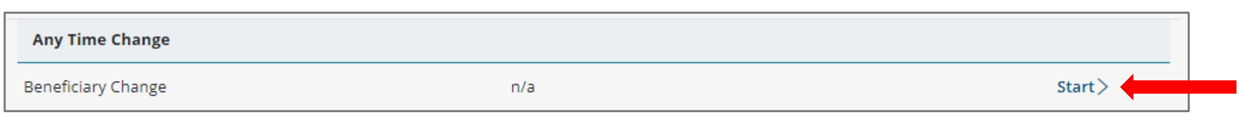


1. In the Benefits Management tool, click the **Enroll or Make Changes** button.

The Enroll and Make Changes screen displays.

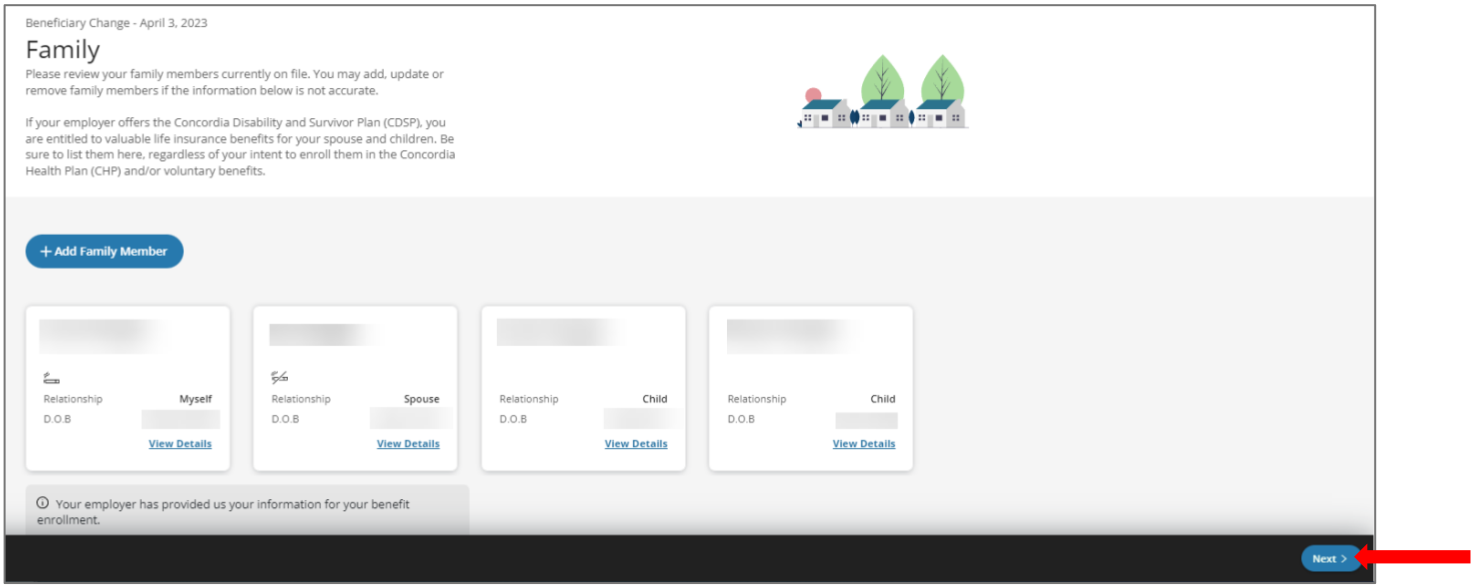


Beneficiary Change is listed in the **Any Time Change** section.

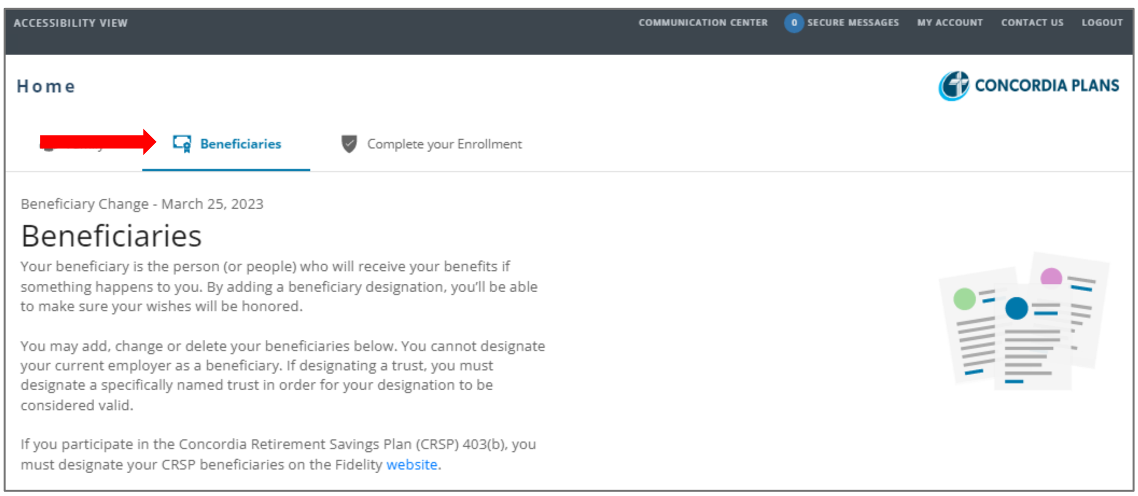


2. Click **Start** at the far right of **Beneficiary Change**.

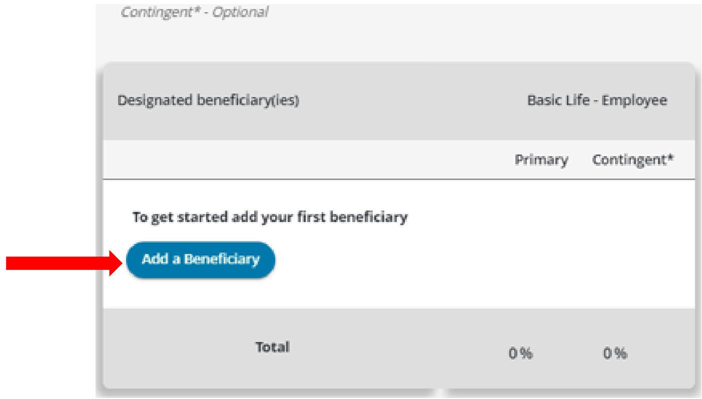
3. The next screen you'll see is the **Family** page. Click Next at the bottom right corner to skip through this page.

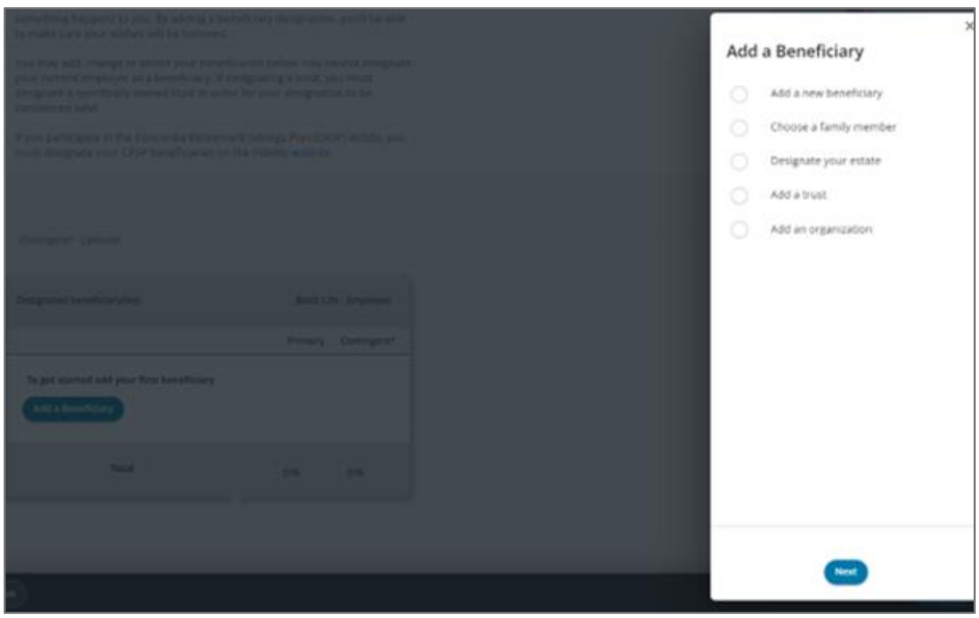


The Beneficiaries screen now displays.

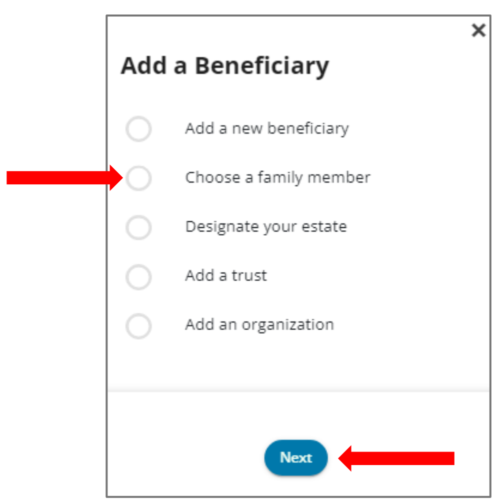


4. Scroll down to the **Designated beneficiary(ies)** section.
5. Click the **Add a Beneficiary** button.
   The Add a Beneficiary panel opens at the right side of the screen.

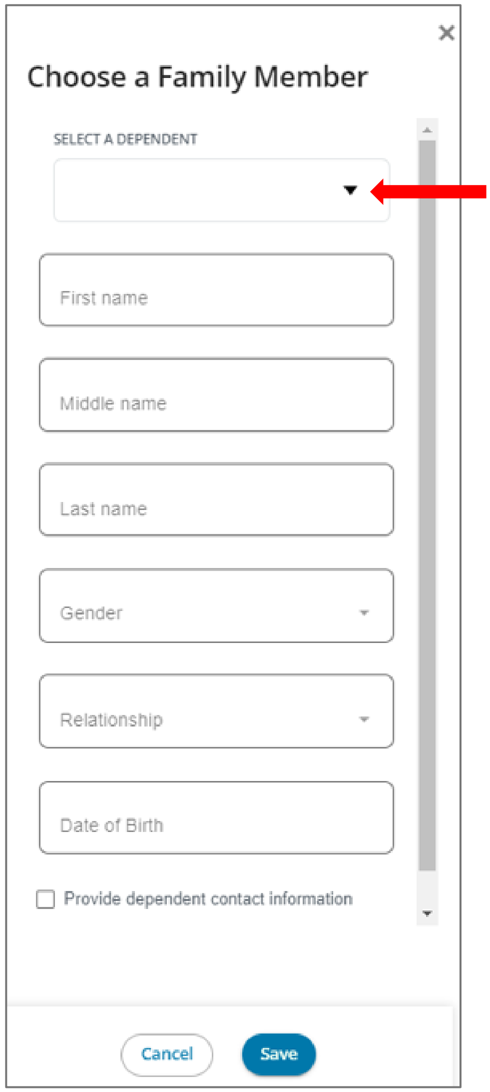




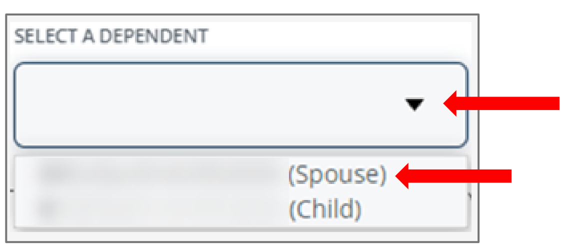
Note the options for beneficiaries. You may add a new beneficiary, choose a family member (from the dependents listed in the Family page), designate your estate, add a trust or add an organization. Select the checkbox next to the appropriate option and click Next.



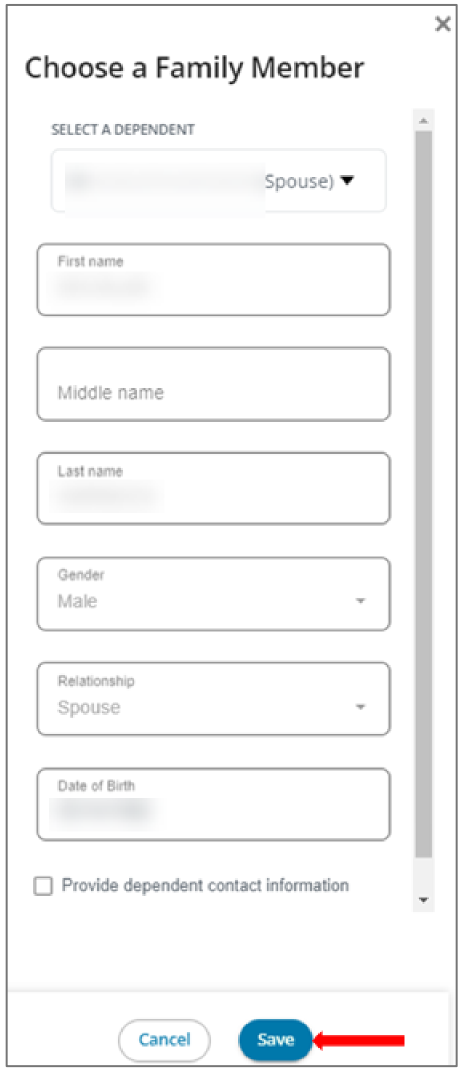
6. If you selected **Choose a family member**, the Choose a Family Member panel displays, giving you the option to select a dependent.



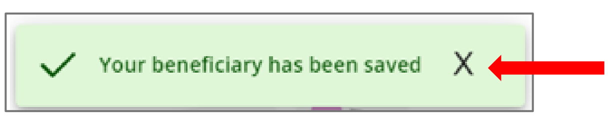
7. Click the drop-down arrow in the **Select a Dependent** field, and select the appropriate family member.



The dependent's demographic information fills in the remaining fields.

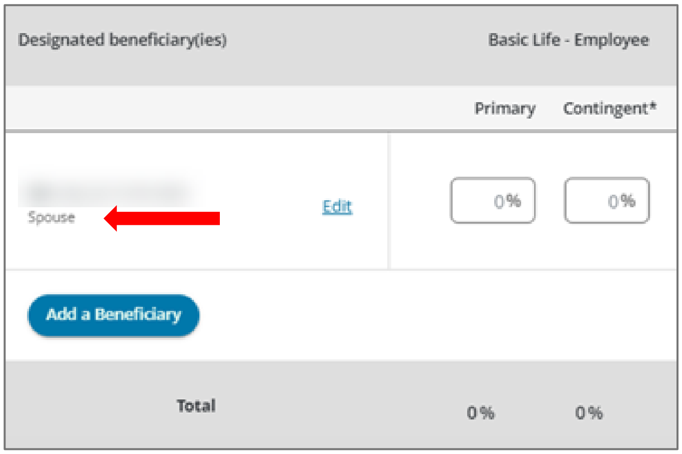


8. Click the **Save** button.
   A confirmation message displays.

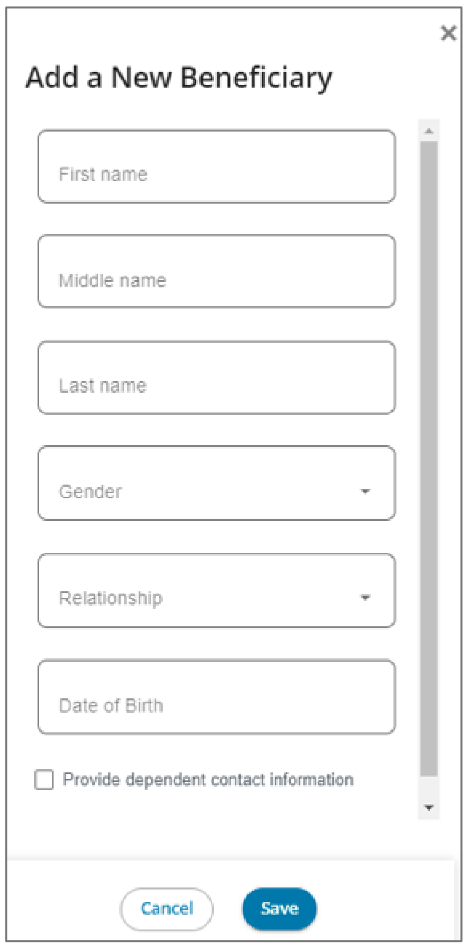


9. Click the **X** to close the confirmation message.

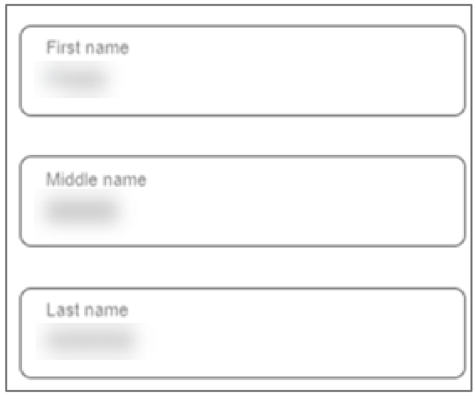
The newly added dependent now displays in the Designated Beneficiary(ies) section.



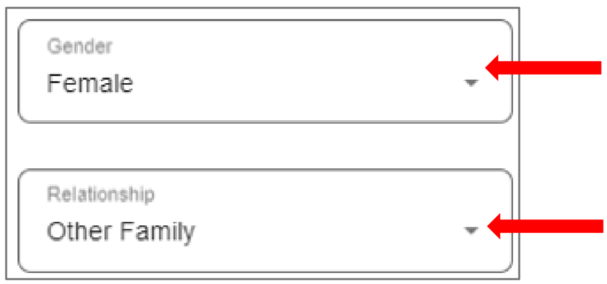
10. If you selected **Add a new beneficiary,** the Add a New Beneficiary panel displays.



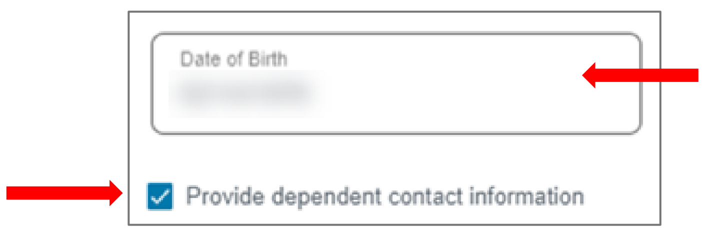
11. Enter the first name, middle name, and last name into the appropriate fields.



12. Click the drop-down arrow in the **Gender** field, and make your selection.
13. Click the drop-down arrow in the **Relationship** field, and make your selection.



14. Enter the beneficiary's birth date in the **Date of Birth** field, and click the **Provide dependent contact information** checkbox.

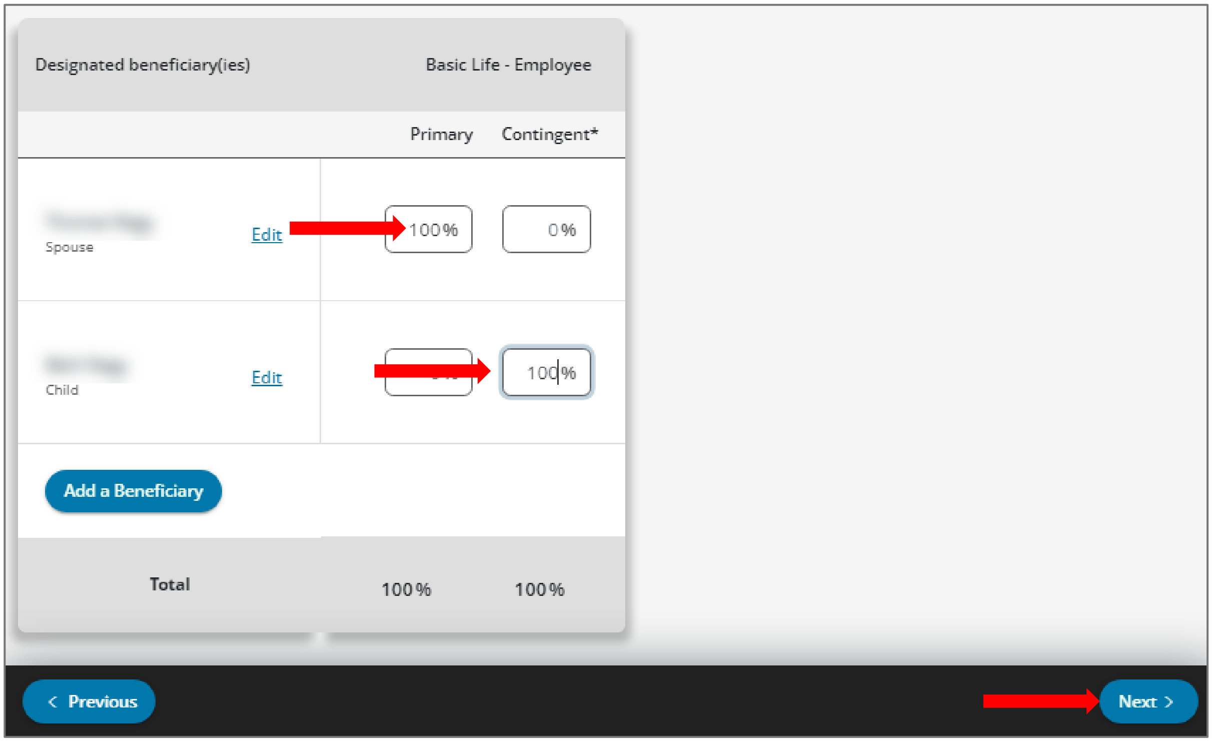


The Contact Information fields display below.

15. Enter the beneficiary’s full address, and click the **Save** button.
    A confirmation message displays.

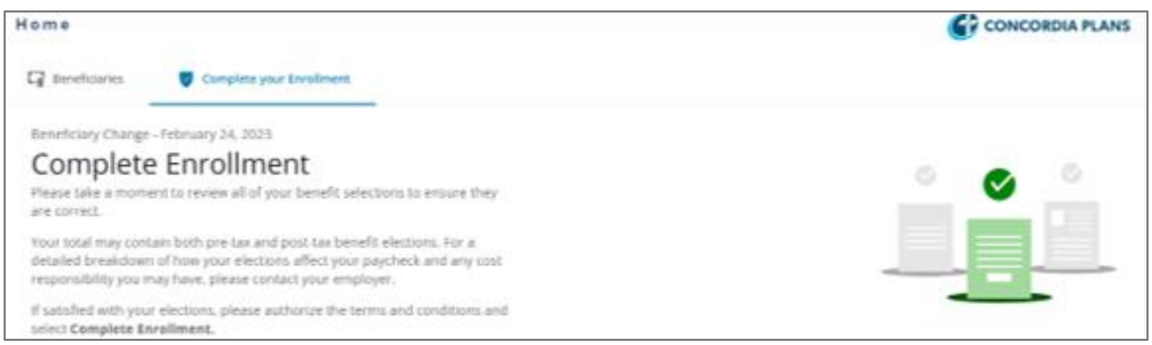
16. Click the **X** to close the confirmation message.

The steps to designate your estate, add a trust or add an organization are similar to the steps listed above. Select the appropriate action, click Next and follow the prompts on your screen. After adding your beneficiary(ies), designate the appropriate allotments for each beneficiary. The values in the Primary fields (and Contingent fields, if used) must add up to 100%.

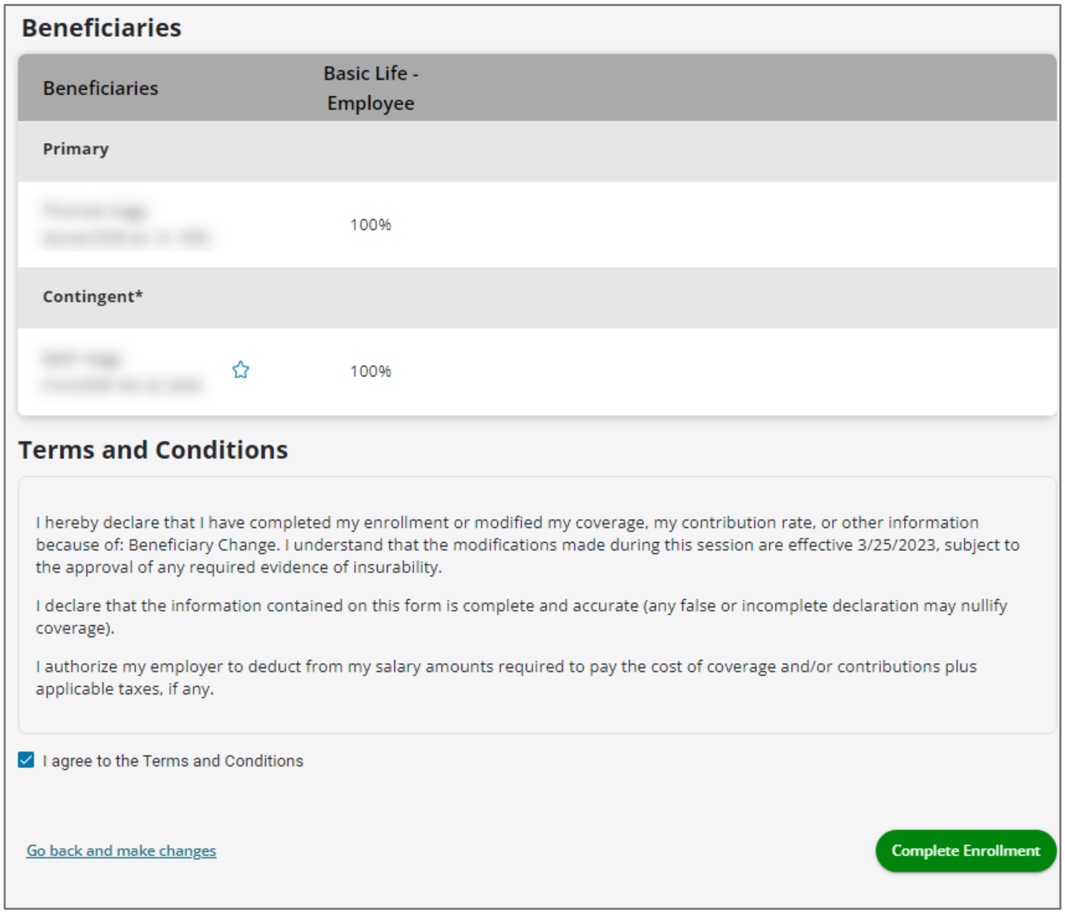


17. Enter the **Primary** and **Contingent** values as desired.
    In this example, a spouse and child are split as the Primary beneficiaries.

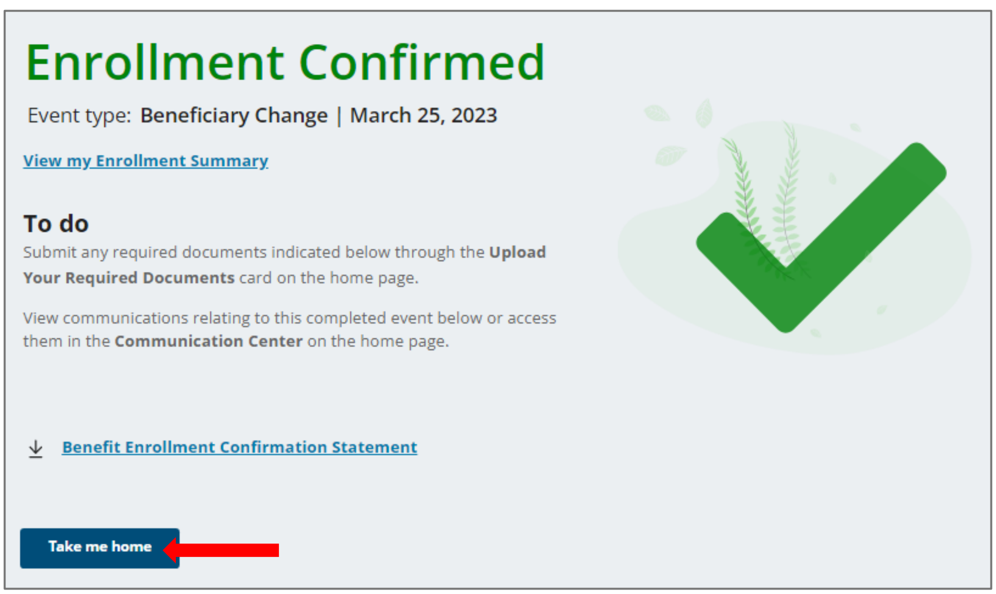
18. Click the **Next** button at the bottom of the screen.
    The Complete Enrollment screen displays.



19. Scroll down to the **Beneficiaries** section.



20. Read the Terms and Conditions, click the **I agree to the Terms and Conditions** checkbox to indicate your agreement, then click the **Complete Enrollment** button.
    The Enrollment Confirmed screen displays.



21. Click the **Take me home** button.

    A new document is available in the Communication Center.

22. Click the **Communication Center** option in the top right menu.
    The Confirmation Statement displays on the Documents screen.

23. Click the document link to open and review the document.