Getting Started: Editing Beneficiary Allocations

**Editing Beneficiary Allocations**

1. Access the Benefits Worklet.

2. Under the **Change** column, click on the **Benefits Button**.

   ![Benefits Button](image)

3. Use the **Dropdown** to select the **Benefit Event Type**. To update beneficiary allocations, select **Change Life Insurance Election**.

   Use the **Calendar Icon** to select the **Benefit Event Date**.

   ![Change Benefits](image)

4. Click on the **Submit Button**.

5. You have submitted the request to change your benefits. Click the **Open Button** to open the task to change your benefits.

6. Scroll to the bottom of Step 1 of 3 and click the **Continue Button**.

   ![Continue Button](image)

   If you are making changes to your life insurance elections (electing, waiving, or changing the amounts) make your elections on this screen before you click the **Continue Button**.

7. Update the **Primary** or **Contingent** percentage or allocation directly in the box.

   ![Primary Contingent](image)

8. Use the **Plus** or **Minus Icons** to add or remove beneficiaries.
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9. Use the **Prompt Icon** to select a beneficiary. You can also create a new beneficiary during this process.

10. Click the **Continue Button**.

11. Review your information and click the **Submit Button** to submit your changes.

💡 Review <insert name of job aid> for the steps to change **Beneficiary Contact** information.