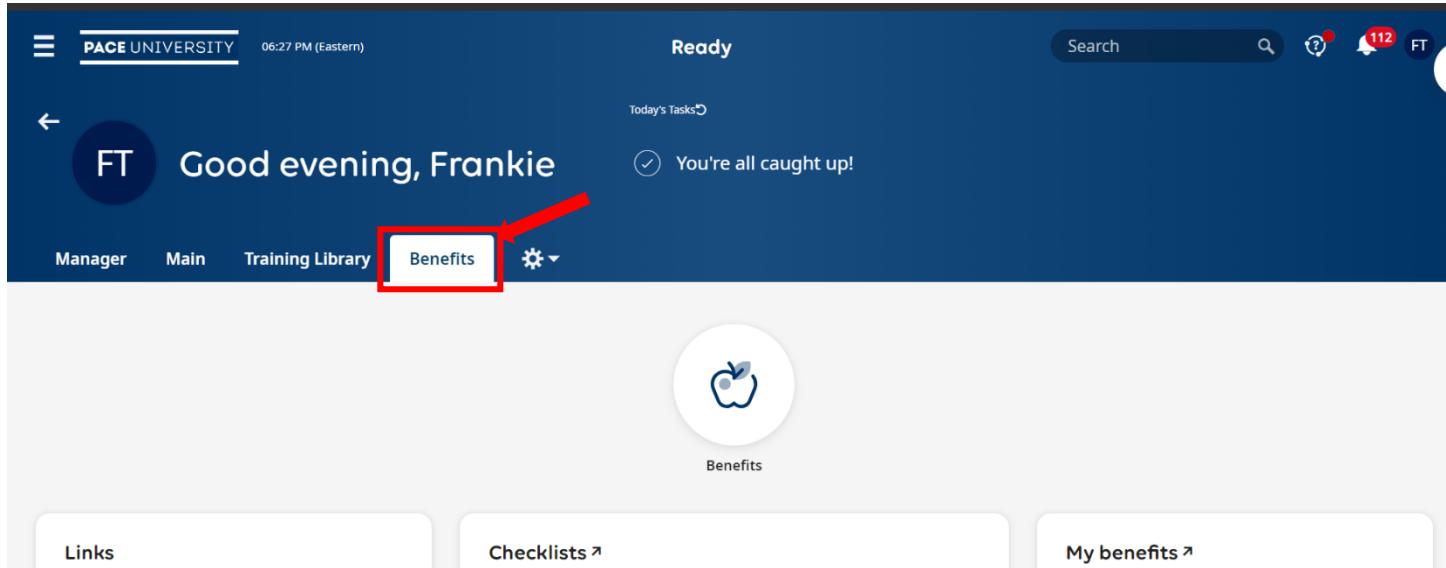


Updating Beneficiaries:

This training document is intended to provide instruction on how to add or update your Benefit plan beneficiaries.

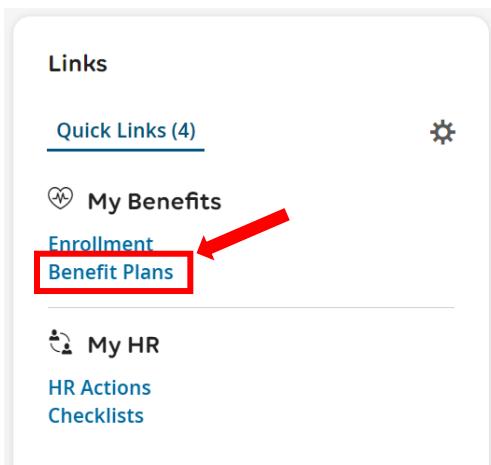
Login into Pace Portal and click on the blue UKG Ready Dashboard button located on the home page. Login with your Pace Portal credentials to access the system.

From your homepage, click on the **Benefits** tab:



The screenshot shows the UKG Ready Dashboard. At the top, there is a header with the PACE UNIVERSITY logo, the time (06:27 PM (Eastern)), and a search bar. Below the header, a message says "Good evening, Frankie" and "You're all caught up!". The navigation bar includes links for Manager, Main, Training Library, Benefits (which is highlighted with a red box and a red arrow pointing to it), and a gear icon. Below the navigation bar is a circular icon with a blue apple logo and the word "Benefits". At the bottom, there are three tabs: "Links", "Checklists", and "My benefits" (which is highlighted with a red box and a red arrow pointing to it).

In the My Links section of the Benefits tab, click on the **Benefit Plans** link:

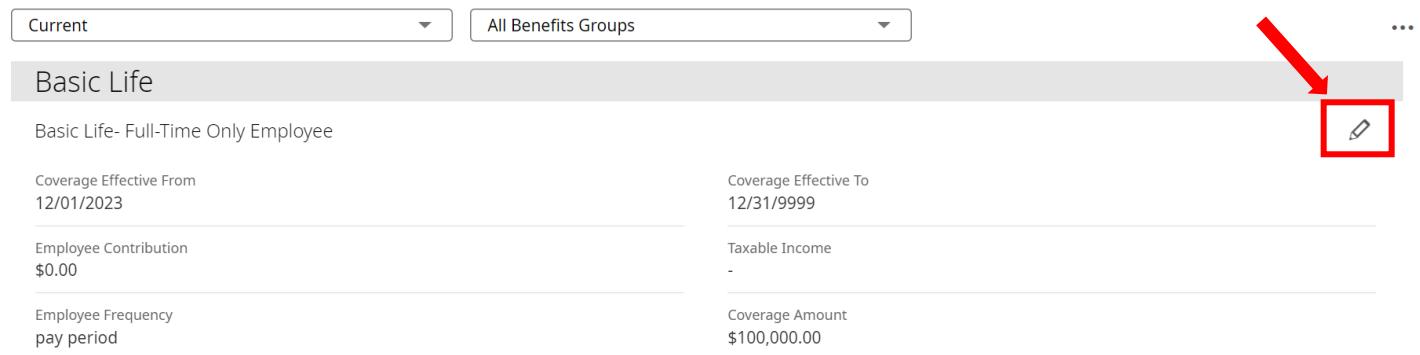


The screenshot shows the "Links" section of the Benefits tab. It includes a "Quick Links (4)" section with a gear icon. Below it are three categories: "My Benefits" (with a heart icon), "Enrollment" (with a person icon), and "Benefit Plans" (which is highlighted with a red box and a red arrow pointing to it). At the bottom, there are links for "My HR", "HR Actions", and "Checklists".

Scroll down to the plan you would like to add the Beneficiary too (PLEASE NOTE: this can only be added to Life Insurance and AD&D coverage). Click on the **Pencil icon** to the far right of the plan:

← Benefit Plans

If you have questions regarding, please contact the University Benefits office via telephone at 914-923-2828 or e-mail at benefits@pace.edu.

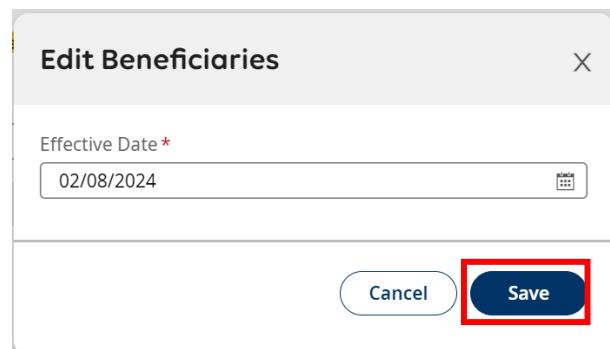


Basic Life

Basic Life- Full-Time Only Employee

Coverage Effective From 12/01/2023	Coverage Effective To 12/31/9999
Employee Contribution \$0.00	Taxable Income -
Employee Frequency pay period	Coverage Amount \$100,000.00

Enter the **Effective Date** and then click **Save**.



Edit Beneficiaries

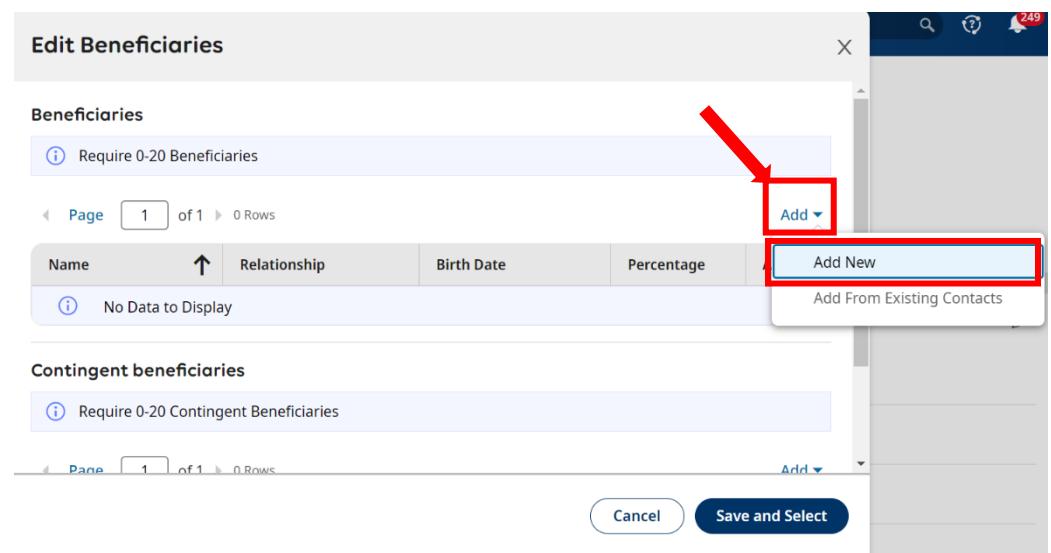
Effective Date *

02/08/2024

Cancel **Save**

The popup box will allow you to add **Beneficiaries** and **Contingent Beneficiaries**. To add, click on the **Add** button to the far right.

You have the option to **Add New** or **Add From Existing Contacts** if this person is already setup as an emergency contact or dependent. Select an option to move forward.



Edit Beneficiaries

Beneficiaries

Require 0-20 Beneficiaries

Page 1 of 1 0 Rows

Name	Relationship	Birth Date	Percentage
No Data to Display			

Add **Add New**

Add From Existing Contacts

Contingent beneficiaries

Require 0-20 Contingent Beneficiaries

Page 1 of 1 0 Rows

Cancel **Save and Select**

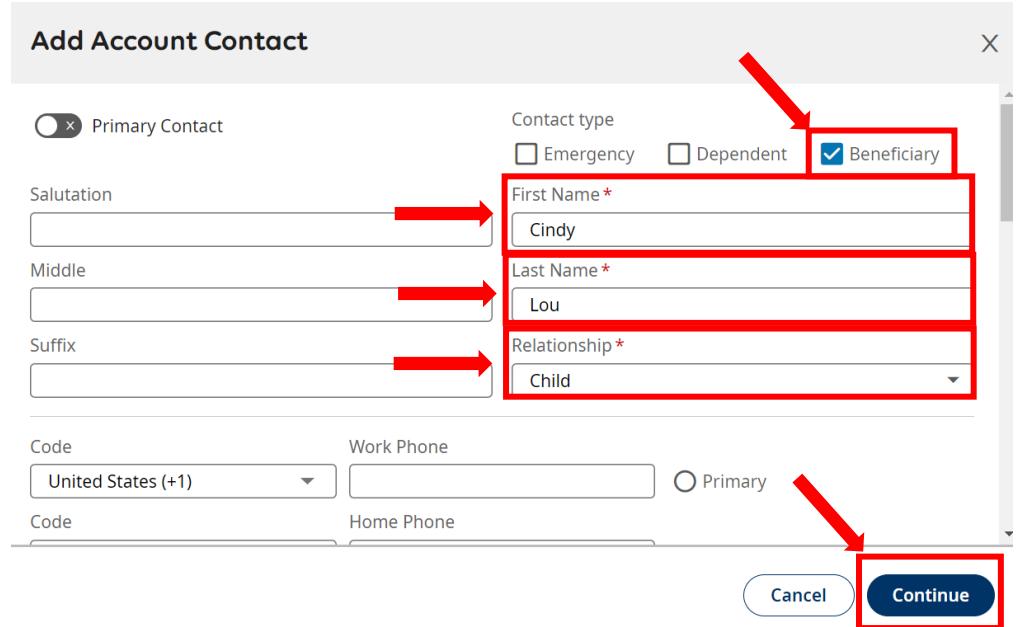
Select **Beneficiary** for the **Contact type**.

Enter the **First Name** and the **Last Name**.

Select the **Relationship**

Then click the **Continue** button.

Add Account Contact



Primary Contact

Contact type

Emergency Dependent Beneficiary

Salutation

Middle

Suffix

First Name * Cindy

Last Name * Lou

Relationship * Child

Code United States (+1)

Work Phone

Code

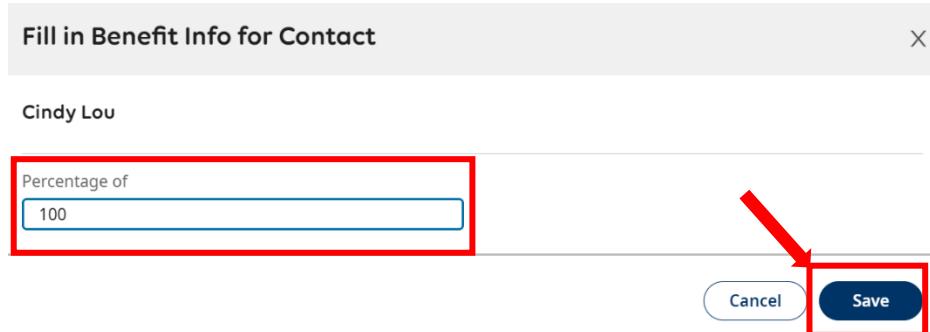
Home Phone

Primary

Cancel Continue

Enter the **Percentage** you would like to designate to this Beneficiary. Then click **Save**.

Fill in Benefit Info for Contact

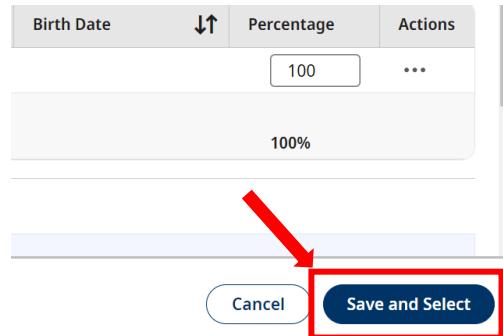


Cindy Lou

Percentage of 100

Cancel Save

Then click **Save and Select** to complete the process.



Birth Date	↓↑	Percentage	Actions
		100	...
		100%	
			Cancel Save and Select