


## Benefits (ESS): Add or Update People to Cover Using BearTrax

### Introduction

**Purpose:**

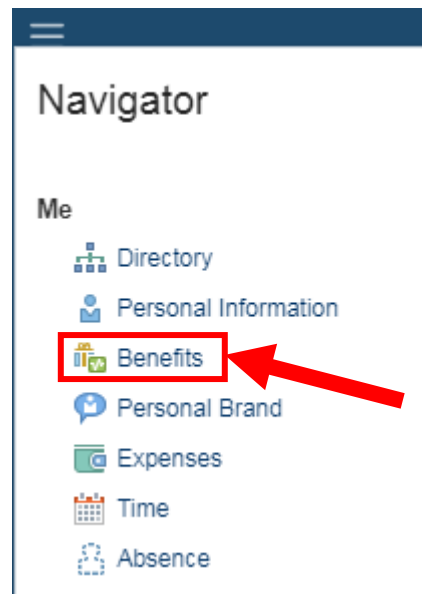
To add or update People to Cover (contacts) in Bear Trax.

**How to Access:**

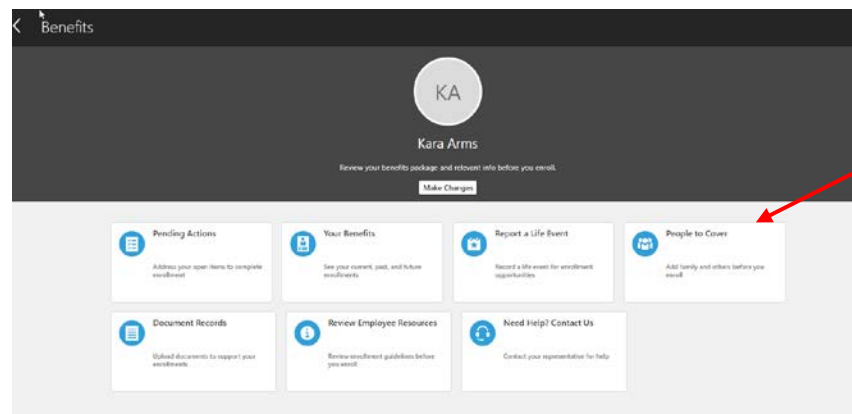
Go to the [Home Screen](#) by clicking the  icon.

Click the  icon.

Under “Me,” click “Benefits.” This will take you to the Benefits screen.



From this screen, you can view, change, and update your beneficiaries while in the open enrollment period



**Helpful Hints:**

Be sure to keep in mind that...

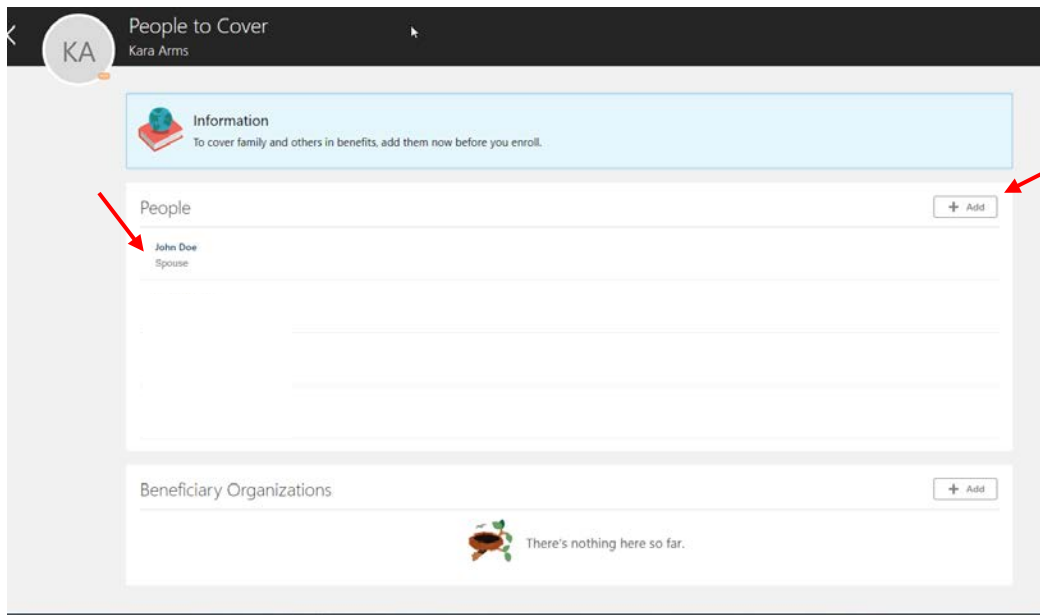
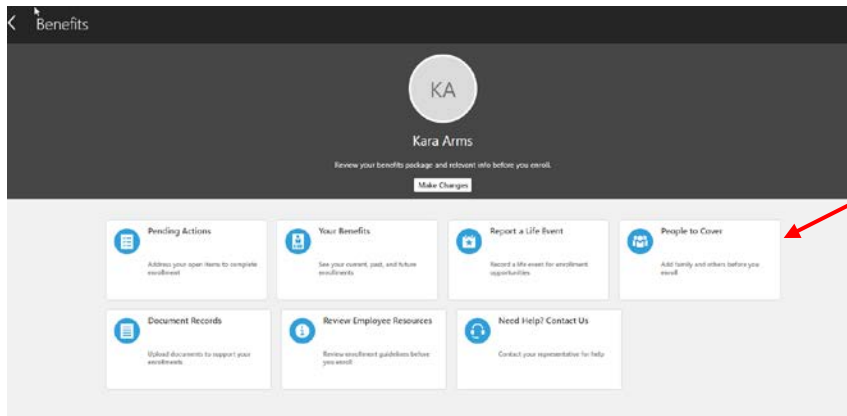
- Be sure to add family members and other beneficiaries as contacts in order to designate them as a beneficiary.
- In your Benefits pages, the term “Contacts” references your dependents and beneficiaries to be covered.

**Procedure:**

Complete the following steps to add or update a people to cover.

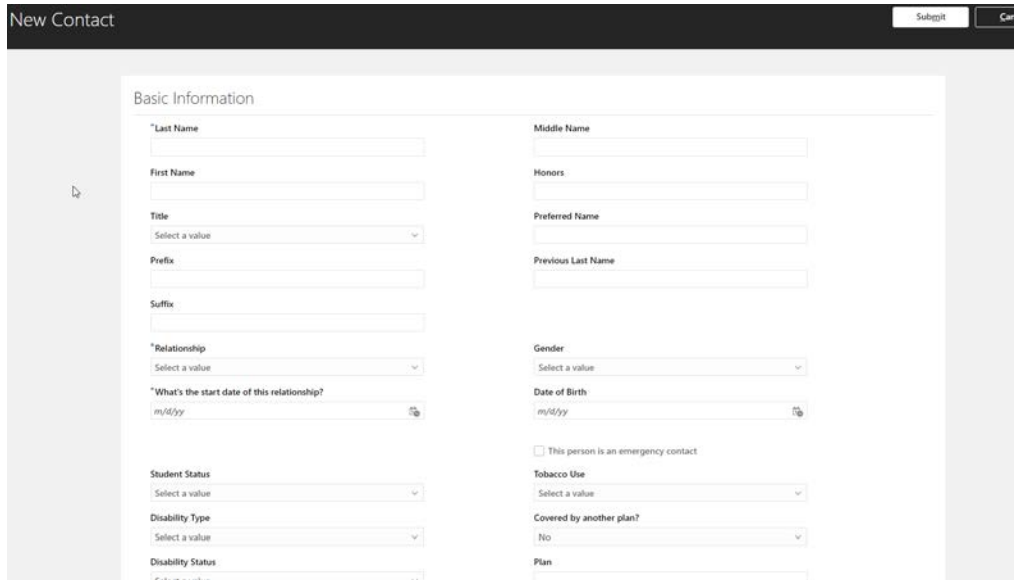
Follow these instructions to add or update your contacts/people to cover.

1. Click “People to Cover.”



## To create a contact:

1. Click “+Add” located in the top right hand corner.
2. Enter all required information to create the contact if they do not already exist in your contacts.
  - a. Gender, Date of Birth, and National ID are required information for all Dependents.
  - b. Disability Status is required for Dependents 26 and older.
3. Complete all required fields below marked by \*.
4. Click “Submit” at the top right corner.

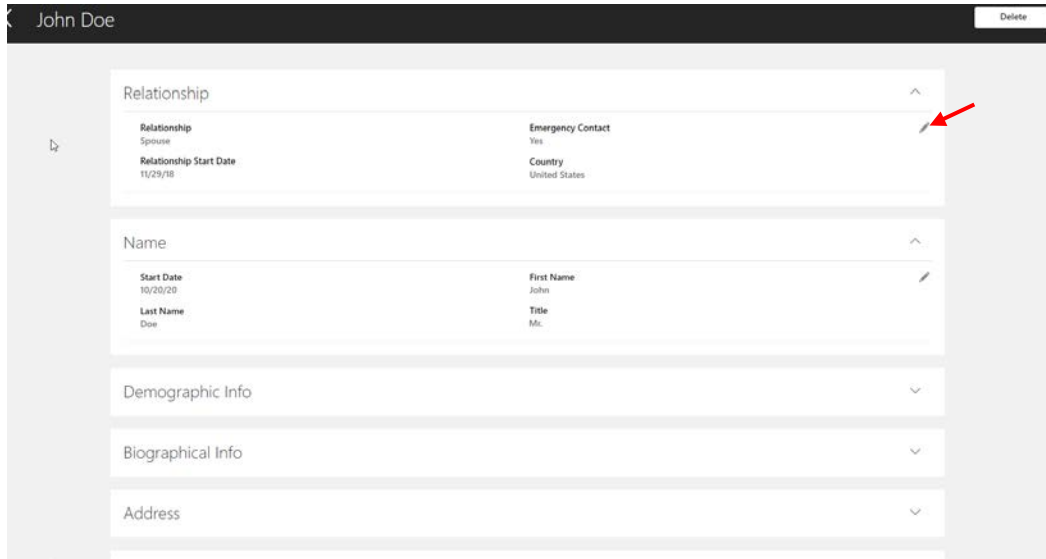


**New Contact** Submit Cancel

**Basic Information**

*Last Name	Middle Name
First Name	Honors
Title	Preferred Name
Prefix	Previous Last Name
Suffix	
*Relationship	Gender
*What's the start date of this relationship?	Date of Birth
Student Status	<input type="checkbox"/> This person is an emergency contact
Disability Type	Tobacco Use
Disability Status	Covered by another plan?
	Plan

5. **To update** contact information, click on the contact’s name.
  1. Click the Pencil on the right side to edit. Fill out the required fields, as marked by an \*.
    - a. If *current* data is incorrect, contact Human Resources to update.
    - b. Any changes made to information for contacts will be effective from the date submitted.



John Doe Delete

Relationship ^

Relationship	Emergency Contact
Spouse	Yes
Relationship Start Date	Country
11/29/18	United States

Name ^

Start Date	First Name
10/20/20	John
Last Name	Title
Doe	Mr.

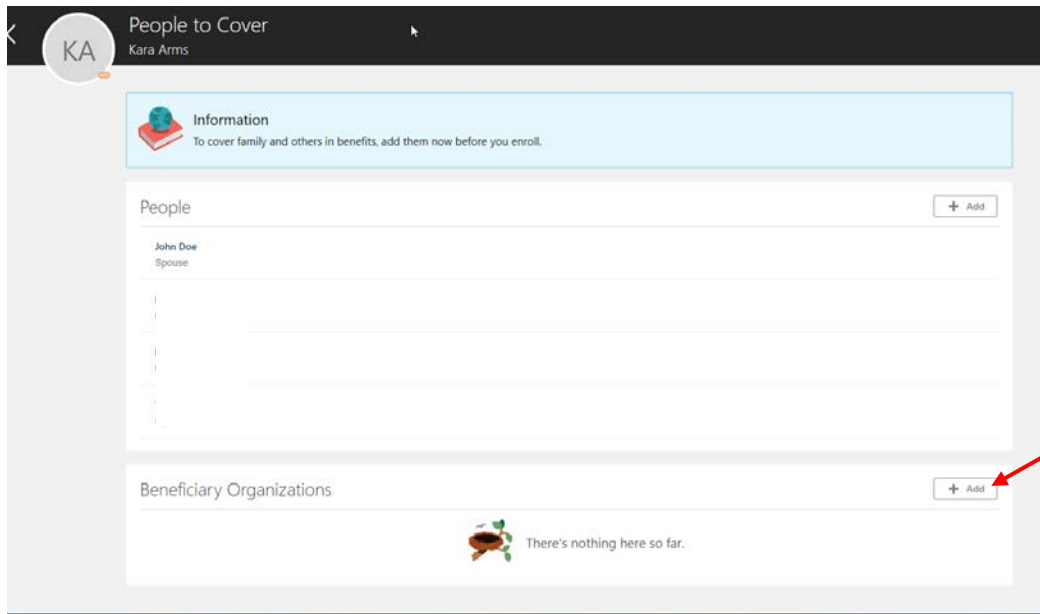
Demographic Info ^

Biographical Info ^

Address ^

## Edit Beneficiary Organizations

1. Click “Beneficiary Organizations” on the bottom of the main “People to Cover” screen.



KA People to Cover Kara Arms

Information  
To cover family and others in benefits, add them now before you enroll.

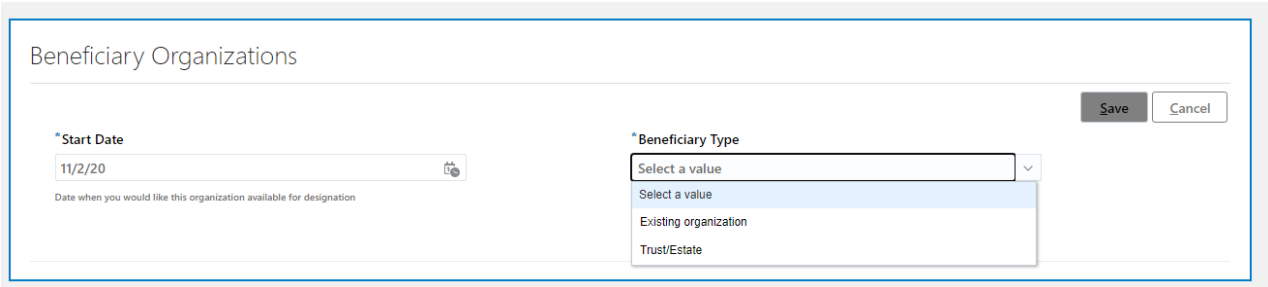
People + Add

John Doe  
Spouse

Beneficiary Organizations + Add

There's nothing here so far.

2. Click “+Add” to begin the steps to add a new Beneficiary.



The screenshot shows a web form titled "Beneficiary Organizations". It has a "Save" button and a "Cancel" button in the top right corner. On the left, there is a field for "\*Start Date" with the value "11/2/20" and a calendar icon. Below it is the text "Date when you would like this organization available for designation". On the right, there is a field for "\*Beneficiary Type" with a dropdown menu. The dropdown menu is open, showing three options: "Select a value", "Existing organization", and "Trust/Estate".

3. Enter the Start Date in the appropriate format.

a. Select the Beneficiary Type.

i. If you are entering an Existing Organization:

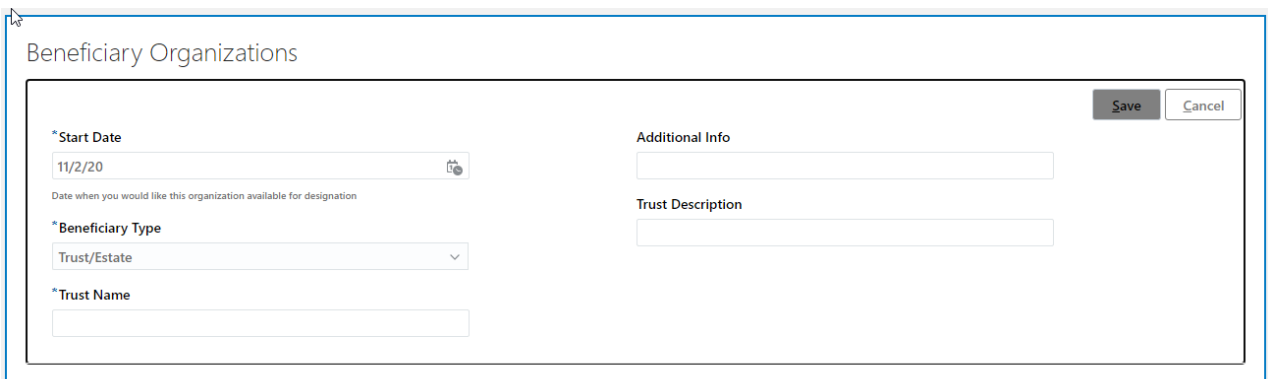
1. Choose the Name from the drop-down menu displayed.

2. Click "Save."

b. If you are entering a Trust/Estate:

1. Enter information into the required fields.

2. Click "Save."



The screenshot shows the same "Beneficiary Organizations" form. The "\*Start Date" field still has "11/2/20". The "\*Beneficiary Type" dropdown menu is now set to "Trust/Estate". Below it is a field for "\*Trust Name" which is currently empty. To the right of the "Trust Name" field, there are two more fields: "Additional Info" and "Trust Description", both of which are also empty. The "Save" and "Cancel" buttons are still present in the top right corner.

**Note:** If you wish to designate a contact as a beneficiary of your benefit elections, you must go through the Change Benefit Elections process to designate them as a beneficiary. *This can only occur during annual enrollment periods or when you report a life event.*