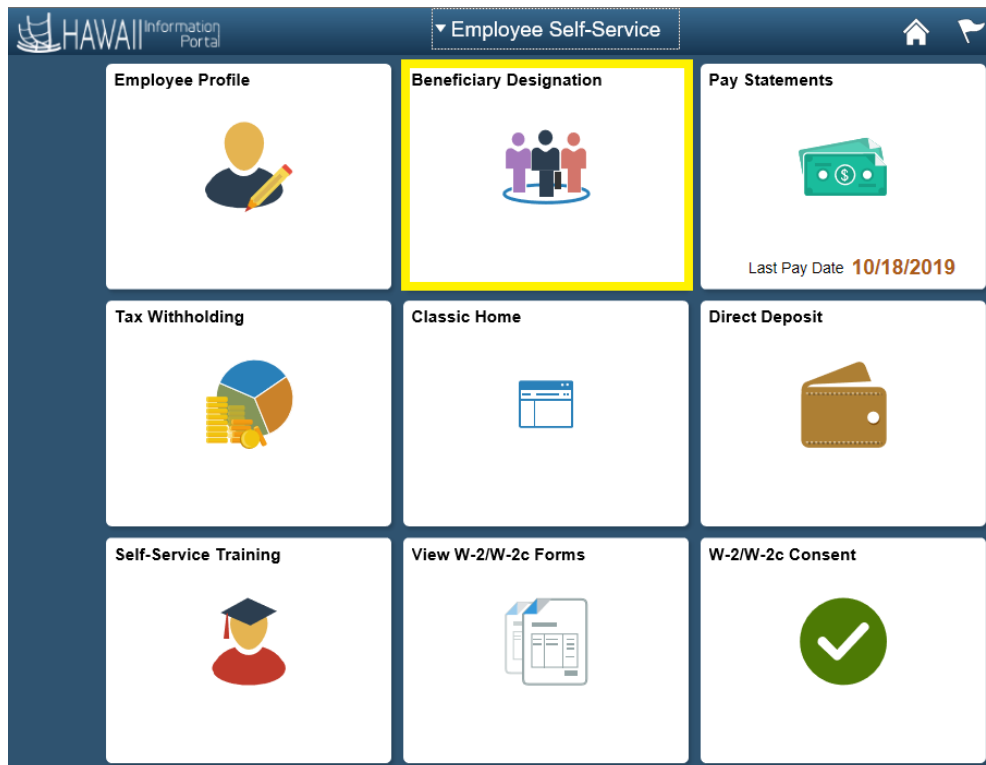


How to View/Update your Payroll Beneficiary Designation

1. You will need to collect your beneficiary information in order to complete your designation, such as their Name, Social Security Number or Tax ID, Address and Phone Number. Once you have this information, you will be ready to proceed.
2. After logging into the Hawaii Information Portal (HIP) system, the Employee Self Service Home Page with various tiles will be displayed.
3. Locate and click on the **Beneficiary Designation** tile to view or update your payroll beneficiary information.



4. **Beneficiary SSN/Tax ID:** First you will need to enter the Social Security Number or Tax ID number in the ***SSN/Tax ID** field of your first beneficiary.

Beneficiary Designation

John Smith Person ID

Primary Benefit Total 100 % Contingent Benefit Total 0 %

Beneficiaries First 1 of 1 Last

*SSN / Tax ID	Edit Name	*Primary % of Pay 100 %	Contingent: <input type="checkbox"/>
Same Address as Employee: <input type="checkbox"/>		Phone Number <input style="width: 100%;" type="text"/>	
Country <input type="text" value="USA"/> United States		Edit Address	
Address HI			

5. Beneficiary Name: Click on the “Edit Name” field to enter the name of your first beneficiary.

Beneficiary Designation

John Smith Person ID 00103812

Primary Benefit Total 100 % Contingent Benefit Total 0 %

Beneficiaries First 1 of 1 Last

*SSN / Tax ID 123456789 **Edit Name** *Primary % of Pay 100 %

Same Address as Employee: Phone Number

Country USA United States Contingent:

Address HI **Edit Address**

Please note that if this beneficiary is an organization, please enter a period “.” in the first name field and the name of the organization in the last name field.

<p>Name</p> <p>English Name Format</p> <p>Example 1: Name of an individual</p> <p>Name Prefix</p> <p>First Name Jane</p> <p>Middle Name</p> <p>Last Name Smith</p> <p>Name Suffix</p> <p>Display Name</p> <p>Formal Name</p> <p>Name</p> <p>OK Cancel Refresh Name</p>	<p>Name</p> <p>English Name Format</p> <p>Example 2: Name of an Organization</p> <p>Name Prefix</p> <p>First Name</p> <p>Middle Name</p> <p>Last Name Name of Trust</p> <p>Name Suffix</p> <p>Display Name</p> <p>Formal Name</p> <p>Name</p> <p>OK Cancel Refresh Name</p>
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Select “OK” when the name entry has been completed.

6. Beneficiary Address: If the beneficiary has the same address as you, check the box “Same Address as Employee”. Your address will then display.

Same Address as Employee: Address Type HOME

Country USA United States

Address 100 Main St
Honolulu, HI 96812

Please note that you may select the magnifying glass next to the “Address Type” to change it to your mailing address instead of your “HOME” Payroll address if needed.

- Beneficiary Address:** If the beneficiary address is not the same as your address, click on the “Edit Address” button to enter the address information.

Beneficiaries First 1 of 1 Last

*SSN / Tax ID Jane Smith *Primary % of Pay %

Same Address as Employee: Phone Number Contingent:

Country United States

Address HI

Edit Address

Country

Address 1

Address 2

Address 3

City State Hawaii

Postal

County

Select “OK” when you have entered the full address.

- Beneficiary Phone Number:** The beneficiary phone number should be entered in the phone number field with the area code included.

Beneficiaries

*SSN / Tax ID Jane Smith

Same Address as Employee:

Country United States

Address HI

- 9. Beneficiary Primary or Contingent:** Your first beneficiary entry will automatically be entered as the “Primary” beneficiary at 100%. You have the option to list one or more persons to be the primary and/or contingent beneficiaries.

If you are designating multiple primary or contingent beneficiaries, indicate the whole percentage each should receive, ensuring the total of each adds up to 100%. Payments will only be made to the contingent beneficiaries if there are no surviving primary beneficiary(ies).

To indicate the beneficiary is a Primary Beneficiary, enter the percentage to be paid to them under the “*Primary % of Pay” field.

John Smith Person ID

Primary Benefit Total 100 % Contingent Benefit Total 0 %

Beneficiaries First 1 of 1 Last

*SSN / Tax ID	<input type="text" value="123456789"/>	<input type="button" value="Edit Name"/>	Jane Smith	<input type="text" value="100"/>	*Primary % of Pay	<input type="text" value="100"/>	<input type="button" value="+"/> <input type="button" value="-"/>
				Contingent: <input type="checkbox"/>			
Same Address as Employee:	<input checked="" type="checkbox"/>	Address Type	<input type="text" value="HOME"/> <input type="button" value="Q"/>	Phone Number	<input type="text" value="808/555-1234"/>		
		Country	USA United States				
		Address	100 Main St Honolulu, HI 96812				

To indicate the beneficiary is a Contingent Beneficiary, select the box next to “Contingent”, the percentage field will then update, and you may enter the percentage to be paid to them under the “*Contingent % of Pay”

John Smith Person ID

Primary Benefit Total 0 % Contingent Benefit Total 100 %

Beneficiaries First 1 of 1 Last

*SSN / Tax ID	<input type="text" value="123456789"/>	<input type="button" value="Edit Name"/>	Jane Smith	<input type="text" value="100"/>	*Contingent % of Pay	<input type="text" value="100"/>	<input type="button" value="+"/> <input type="button" value="-"/>
				Contingent: <input checked="" type="checkbox"/>			
Same Address as Employee:	<input checked="" type="checkbox"/>	Address Type	<input type="text" value="HOME"/> <input type="button" value="Q"/>	Phone Number	<input type="text" value="808/555-1234"/>		
		Country	USA United States				
		Address	100 Main St Honolulu, HI 96812				

10. Add/Remove Primary or Contingent Beneficiary: To add additional beneficiaries, select the “+” icon to insert an additional row. You will then need to restart the steps to enter the necessary information for the beneficiary that you are adding.

To delete a beneficiary after you have saved your information, select the “-“ icon to remove the entire row.

John Smith Person ID

Primary Benefit Total 100 % Contingent Benefit Total 0 %

First 1 of 1 Last

*SSN / Tax ID <input type="text" value="123456789"/>	<input type="button" value="Edit Name"/>	Jane Smith	*Primary % of Pay <input type="text" value="100"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Same Address as Employee: <input checked="" type="checkbox"/>		Address Type <input type="text" value="HOME"/>	Phone Number <input type="text" value="808/555-1234"/>	Contingent: <input type="checkbox"/>
		Country USA United States		
		Address 100 Main St Honolulu, HI 96812		

11. Total Beneficiary Election Percentages: Once you have completed your entries, check under your name at the top of the page to ensure that your Primary Benefit Total and your Contingent Benefit Total are correct and that they do not exceed 100%.

John Smith Person ID

Primary Benefit Total 100 % Contingent Benefit Total 0 %

First 1 of 1 Last

*SSN / Tax ID <input type="text" value="123456789"/>	<input type="button" value="Edit Name"/>	Jane Smith	*Primary % of Pay <input type="text" value="100"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Same Address as Employee: <input checked="" type="checkbox"/>		Address Type <input type="text" value="HOME"/>	Phone Number <input type="text" value="808/555-1234"/>	Contingent: <input type="checkbox"/>
		Country USA United States		
		Address 100 Main St Honolulu, HI 96812		

- Please note that if your totals do not equal 100% for your Primary and Contingent Benefit Totals, you may receive an error message when you try to save the information. You will need to click “OK” on the error message and check your percentages again to ensure that they total 100%

12. When you are done with your entry, select the button at the bottom of the page.

John Smith

Person ID

Primary Benefit Total 100 %

Contingent Benefit Total 0 %

Beneficiaries First 1 of 1 Last

*SSN / Tax ID	<input type="text" value="123456789"/>	<input type="button" value="Edit Name"/>	Jane Smith	*Primary % of Pay	<input type="text" value="100"/> %	<input type="button" value="+"/> <input type="button" value="-"/>
Same Address as Employee:	<input checked="" type="checkbox"/>	Address Type	<input type="text" value="HOME"/>	Phone Number	<input type="text" value="808/555-1234"/>	Contingent: <input type="checkbox"/>
		Country	USA United States			
		Address	100 Main St Honolulu, HI 96812			

Last Updated By	Last Updated 10/17/2019
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- The “Last Updated By” and “Last Updated” fields will update to show that your information was saved successfully.
13. You may view/update your payroll beneficiary information at any time by navigating within HIP to your Beneficiary Designation page.
 14. Once you are done updating your beneficiary information, you can navigate back to your login screen using the “Home” icon at the top right of your screen, or you can select the “Sign out” link if you are done in the HIP system.

