

Purpose: Add or Update Contact Info for a **Dependent or Beneficiary**

Audience: All Teammates



Use this job aid to **add or update** contact information for a **dependent or beneficiary**. The term “contact” will be used in this job aid. Please ensure a contact is listed **only once**.

The relationship chosen for your contact will determine how and where they can be covered on a benefits plan.

Examples:

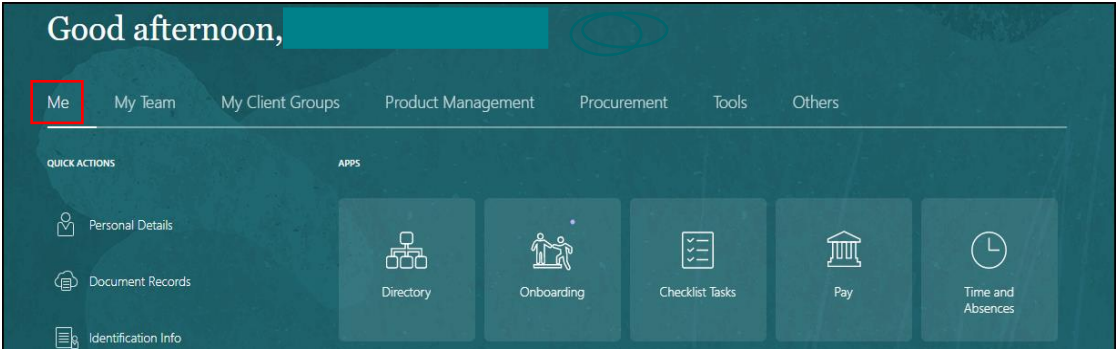
- A **dependent** can be a covered person on a benefits plan, a beneficiary, *and* an emergency contact.
- A **parent** or **friend** *cannot* be a dependent but can be a beneficiary or emergency contact.

To **add coverage** for a dependent, including cases of marriage, birth/adoption, or loss of coverage elsewhere; or to **remove coverage** including cases of divorce/separation, death, or gain in coverage elsewhere; you must *report a qualifying life event*:

- [Use the Create a Life Event and Enroll in or Update Benefits](#) Job Aid for either of these situations.

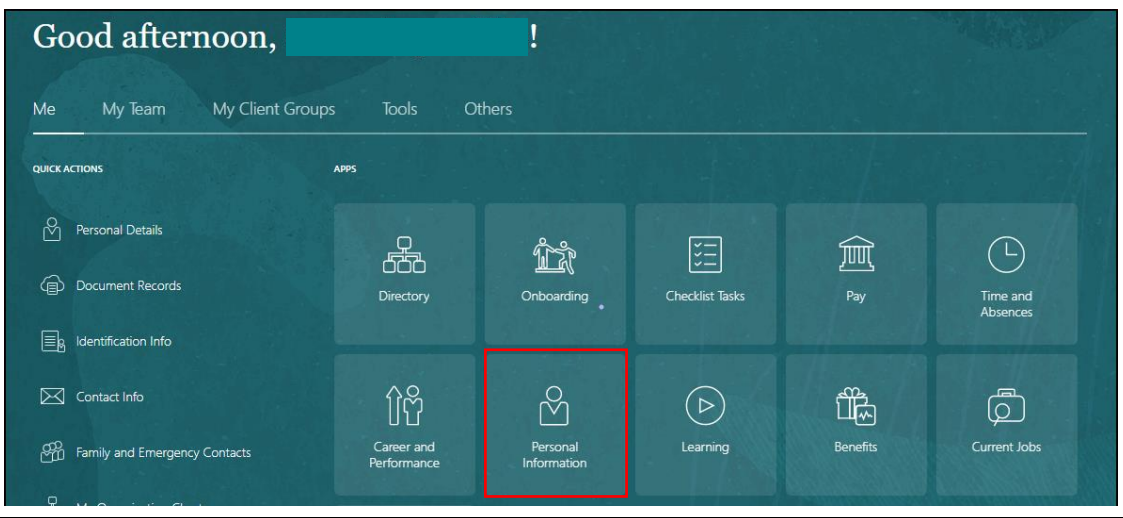
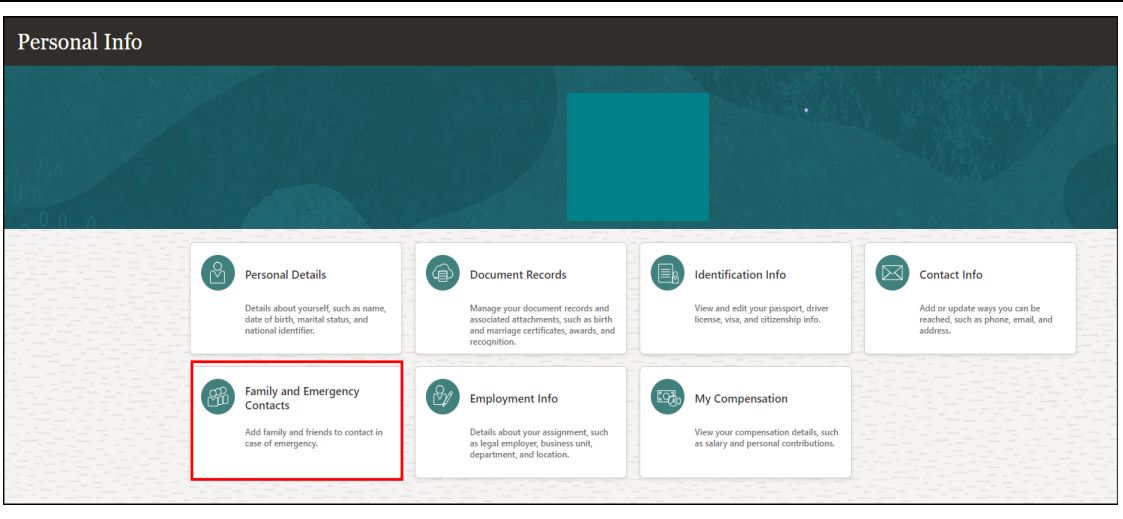
To designate a beneficiary:

- Use the [Designate or Update a Beneficiary](#) Job Aid.

NAVIGATION	ME → PERSONAL INFORMATION → FAMILY AND EMERGENCY CONTACTS
<p>Step 1: Click on the Me tab.</p>	


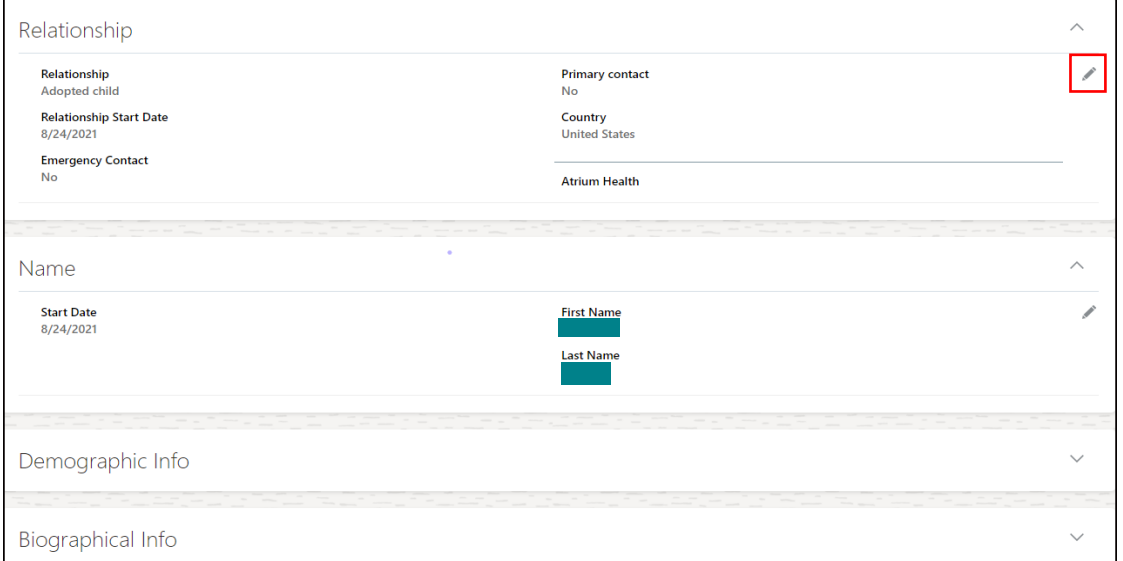
Purpose: Add or Update Contact Info for a Dependent or Beneficiary

Audience: All Teammates

<p>Step 2: Click on Personal Information.</p>	 <p>The screenshot shows a user dashboard with a teal background. At the top, it says "Good afternoon, [redacted]!". Below this are navigation tabs: "Me", "My Team", "My Client Groups", "Tools", and "Others". There are two columns of app tiles. The left column is labeled "QUICK ACTIONS" and includes "Personal Details", "Document Records", "Identification Info", "Contact Info", and "Family and Emergency Contacts". The right column is labeled "APPS" and includes "Directory", "Onboarding", "Checklist Tasks", "Pay", "Time and Absences", "Career and Performance", "Personal Information" (highlighted with a red box), "Learning", "Benefits", and "Current Jobs".</p>
<p>Step 3: Click on Family and Emergency Contacts</p>	 <p>The screenshot shows the "Personal Info" page. At the top, it says "Personal Info". Below this is a large teal header image. The main content area contains several white tiles with icons and text. The tiles are: "Personal Details" (Details about yourself, such as name, date of birth, marital status, and national identities), "Document Records" (Manage your document records and associated attachments, such as birth and marriage certificates, awards, and recognition), "Identification Info" (View and edit your passport, driver license, visa, and citizenship info), "Contact Info" (Add or update ways you can be reached, such as phone, email, and address), "Family and Emergency Contacts" (Add family and friends to contact in case of emergency) (highlighted with a red box), "Employment Info" (Details about your assignment, such as legal employer, business unit, department, and location), and "My Compensation" (View your compensation details, such as salary and personal contributions).</p>
<p>Note:</p> <ul style="list-style-type: none">• Complete Steps 4a-e to update an existing contact information.• Bypass Steps 4a-e and complete Step 5 to add a new contact information.	

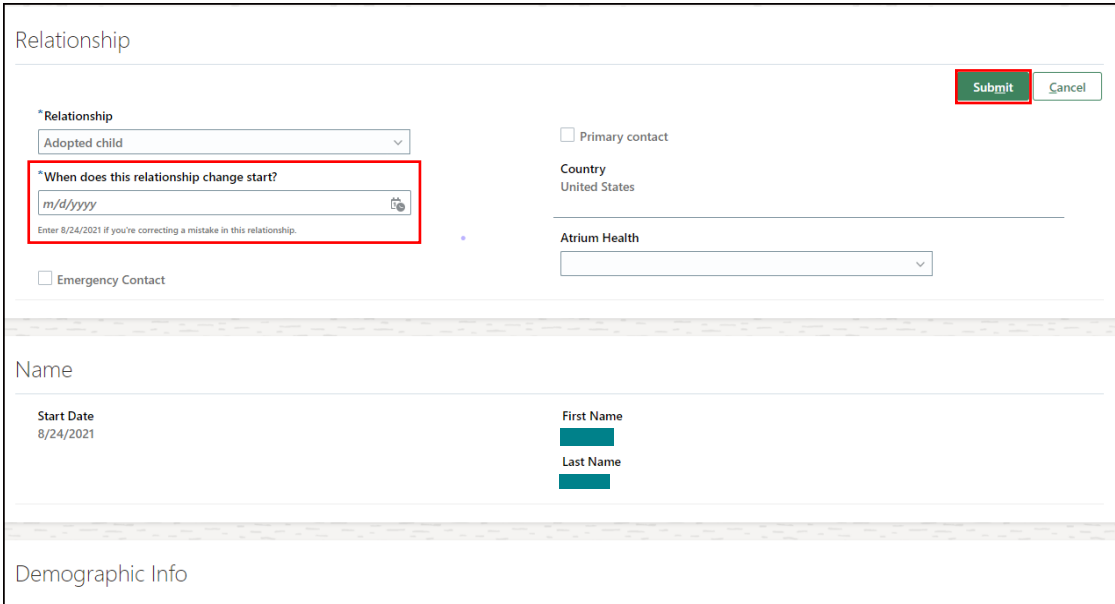
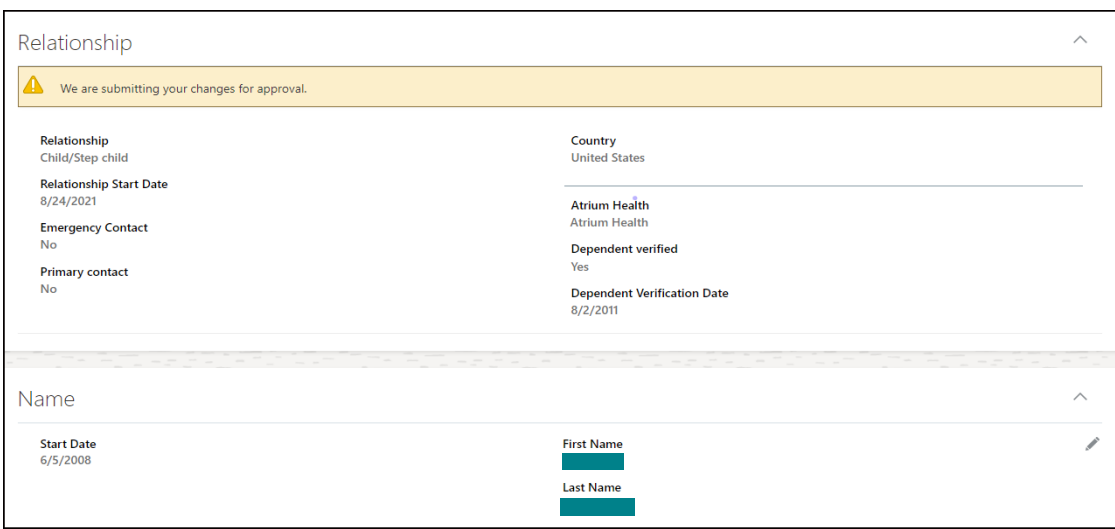

Purpose: Add or Update Contact Info for a Dependent or Beneficiary

Audience: All Teammates

<p>Step 4a: To update an existing contact, click on name in My Contacts list.</p> <p>Please ensure a contact is listed only once.</p>	 <p>The screenshot shows a 'My Contacts' interface with a '+ Add' button in the top right. A red arrow points to a contact name in the list, which is partially obscured by a teal rectangle. Another teal rectangle is visible below the list.</p>
<p>Step 4b: Click pencil edit icon in each category requiring edits.</p>	 <p>The screenshot shows a contact details form with several sections: 'Relationship', 'Name', 'Demographic Info', and 'Biographical Info'. The 'Relationship' section includes fields for 'Relationship' (Adopted child), 'Relationship Start Date' (8/24/2021), 'Emergency Contact' (No), 'Primary contact' (No), 'Country' (United States), and 'Atrium Health'. The 'Name' section includes 'Start Date' (8/24/2021), 'First Name', and 'Last Name'. Pencil edit icons are highlighted with red boxes in the top right of the 'Relationship' section and next to the 'First Name' field.</p>

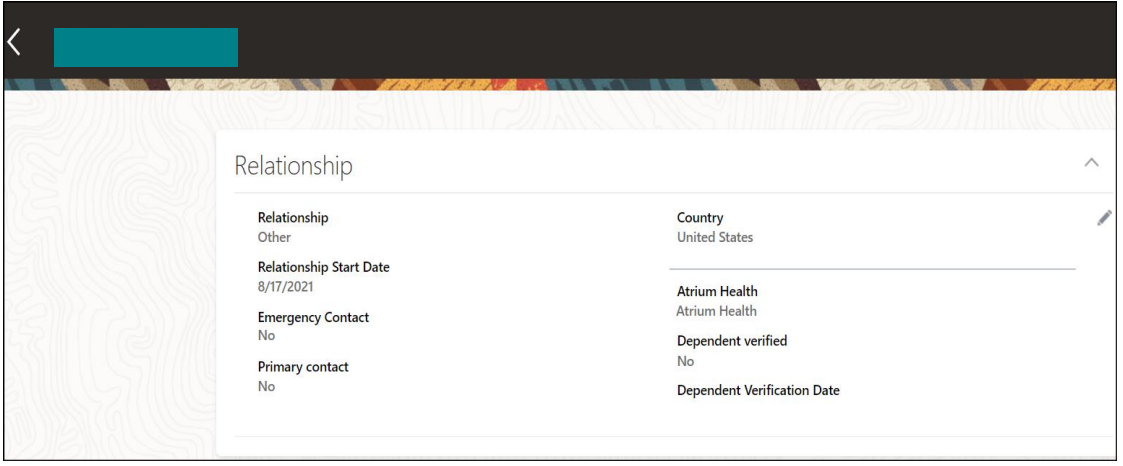
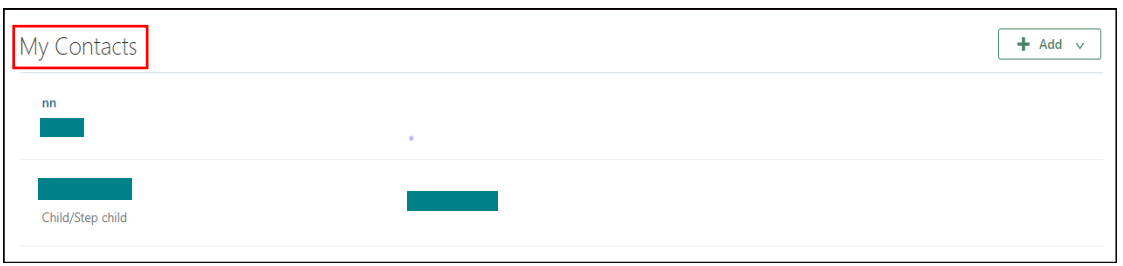
Purpose: Add or Update Contact Info for a Dependent or Beneficiary

Audience: All Teammates

<p>Step 4c: Edit each category as needed, then click Submit.</p> <p>Note: Enter date on or after today's date in the When does this relationship change start category.</p>	 <p>Relationship</p> <p><input type="button" value="Submit"/> <input type="button" value="Cancel"/></p> <p>*Relationship Adopted child</p> <p>*When does this relationship change start? m/d/yyyy</p> <p>Enter 8/24/2021 if you're correcting a mistake in this relationship.</p> <p><input type="checkbox"/> Primary contact</p> <p>Country United States</p> <p>Atrium Health</p> <p><input type="checkbox"/> Emergency Contact</p> <p>Name</p> <p>Start Date 8/24/2021</p> <p>First Name</p> <p>Last Name</p> <p>Demographic Info</p>
<p>Step 4d: You will receive a notification stating that your changes have been submitted for approval.</p>	 <p>Relationship</p> <p> We are submitting your changes for approval.</p> <p>Relationship Child/Step child</p> <p>Relationship Start Date 8/24/2021</p> <p>Emergency Contact No</p> <p>Primary contact No</p> <p>Country United States</p> <p>Atrium Health Atrium Health</p> <p>Dependent verified Yes</p> <p>Dependent Verification Date 8/2/2011</p> <p>Name</p> <p>Start Date 6/5/2008</p> <p>First Name</p> <p>Last Name</p>

Purpose: Add or Update Contact Info for a Dependent or Beneficiary

Audience: All Teammates

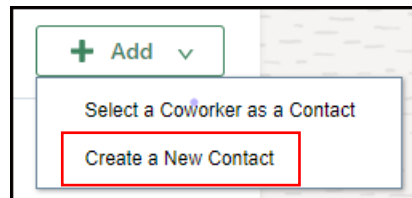
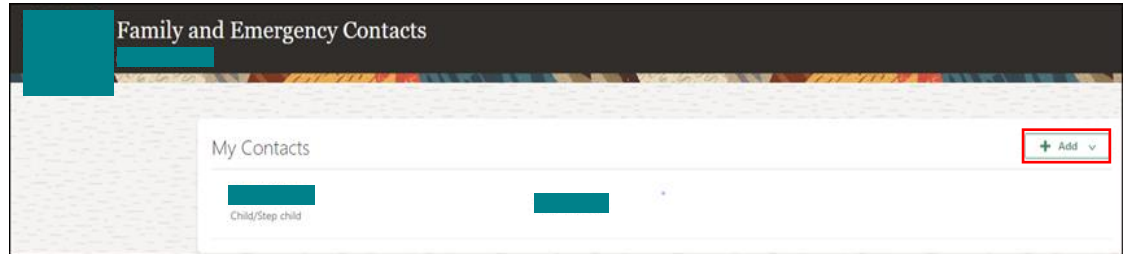
<p>Step 4e: Click back arrow next to person's name in upper left corner of page.</p>	 <p>The screenshot shows a mobile application interface for editing a relationship. At the top left, there is a back arrow icon next to a teal-colored name placeholder. A red arrow points to this back arrow. The main content area is titled 'Relationship' and contains several fields: 'Relationship' (Other), 'Relationship Start Date' (8/17/2021), 'Emergency Contact' (No), and 'Primary contact' (No). On the right side, there are fields for 'Country' (United States), 'Atrium Health' (Atrium Health), 'Dependent verified' (No), and 'Dependent Verification Date'.</p>
<p>Step 4f: This returns you to the My Contacts page. Complete Steps 4a-e for each additional contact to be updated.</p>	 <p>The screenshot shows the 'My Contacts' page in a mobile application. The title 'My Contacts' is highlighted with a red box. In the top right corner, there is a '+ Add' button with a dropdown arrow. Below the title, there is a list of contacts. The first contact is labeled 'nn' and has a teal-colored name placeholder. The second contact is labeled 'Child/Step child' and also has a teal-colored name placeholder.</p>

Purpose: Add or Update Contact Info for a Dependent or Beneficiary

Audience: All Teammates

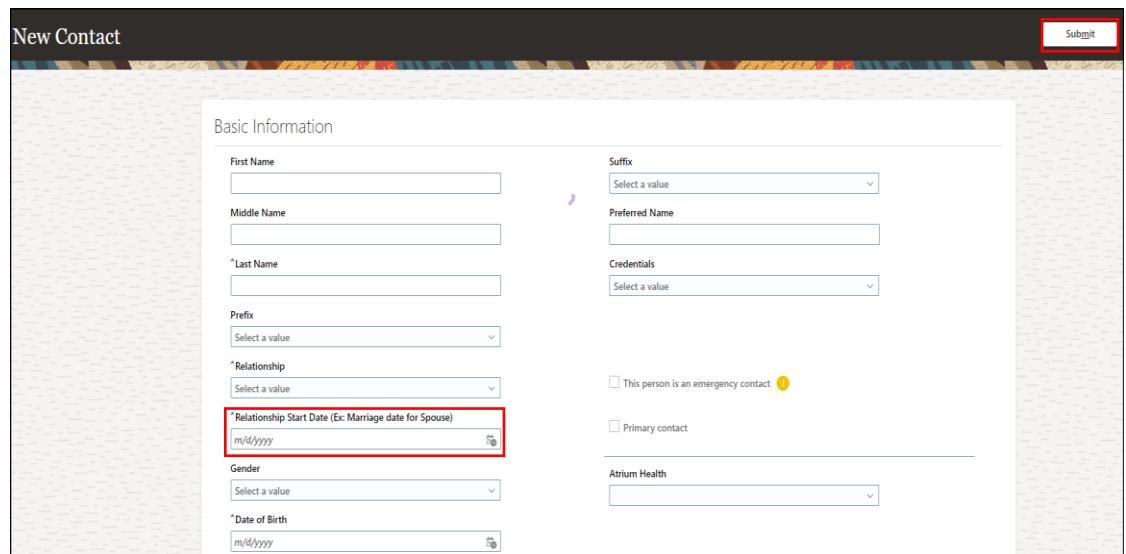
Note:
Complete **Steps 5a-b** to **add** new contact information.

Step 5a:
To **add** a contact, click **+ Add** on the **My Contacts** page. Click on drop-down and select **Create a New Contact**.



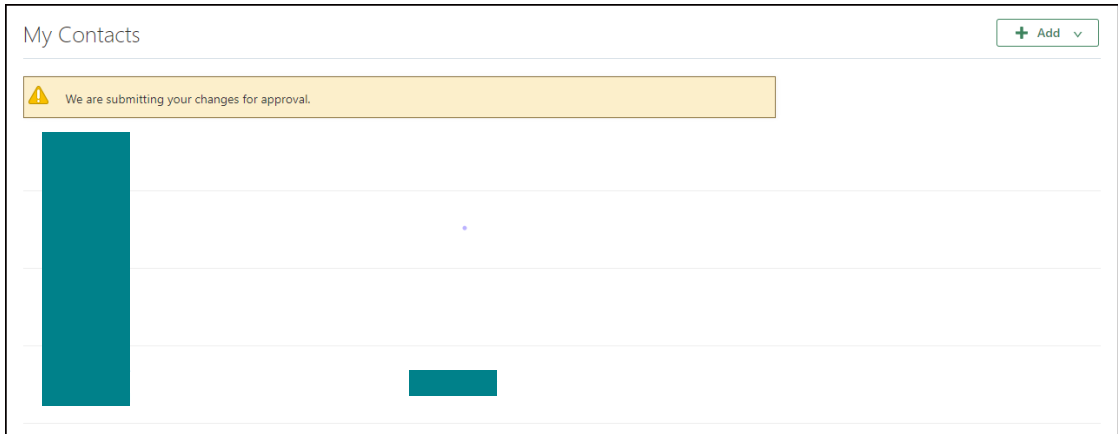
Step 5b:
Enter contact information. Scroll down page as needed. Click **Submit**.

Note: The date you enter in the **Relationship Start Date** category should align with the event (e.g., For a new child, enter date of birth; for a new spouse, enter date of marriage).

A screenshot of the 'New Contact' form. The form is titled 'New Contact' and has a 'Submit' button in the top right corner. The form is divided into two columns. The left column is titled 'Basic Information' and contains fields for: First Name, Middle Name, Last Name, Prefix, Relationship, Relationship Start Date (Ex: Marriage date for Spouse), Gender, and Date of Birth. The 'Relationship Start Date' field is highlighted with a red rectangular box. The right column contains fields for: Suffix, Preferred Name, Credentials, a checkbox for 'This person is an emergency contact', a checkbox for 'Primary contact', and Atrium Health.

Purpose: Add or Update Contact Info for a **Dependent** or **Beneficiary**

Audience: All Teammates

<p>Step 5c: This takes you back to the My Contacts page. Complete Steps 5a-b for any other contacts you need to add.</p>	
<p style="text-align: center;">Notes</p> <p>If you need assistance:</p> <ul style="list-style-type: none">• Greater Charlotte teammates, call the Atrium Health Benefits Service Center at 704-631-1500, Option 1.• Navicent teammates, call the Navicent Benefits Service Center 1-800-964-4780, select the option for Macon.• Floyd teammates, call the Floyd Benefits Service Center at 866-228-1674.	