# **BOSS**: How to Update / Change Beneficiary Information

[*Life Insurance only*]

**IMPORTANT!** Beneficiary information listed in BOSS are designated for ***life insurance only;*** you must designate your 401 (k), 457 and other retirement accounts through the Prudential website. In addition, you must designate your Utah Retirement Systems (URS) beneficiaries through the URS website and your Health Savings Account (HSA ) through the Health Equity website!

- Log in to BOSS www.utahcounty.bswift.com
- Click on the "My Profile" link on the top of the page
- Click on the Beneficiaries link listed under Personal Information
- Complete the information to identify both primary and secondary beneficiaries on ***all*** life insurances you may have through Utah County.
- Review
- Save
- Print

It's wise to periodically review and keep information up-to-date!

The My Profile page will allow you to update and make changes to your Family, Demographic, and Emergency Contact information, as well as your address, phone number and email address.

**BOSS LOG IN AND PASSWORD**

- Your BOSS log in is originally set up as your first and last name, lower case and no spaces
- Your BOSS password is originally set up using the last 4 digits of your SS. No.
- BOSS login and password's can be re-set by contacting the Personnel Office at 801-851-8158

# PRUDENTIAL: How to Update / Change Beneficiary Information

[*Prudential Retirement Accounts only*]

Once you have *set up and registered your account with Prudential Retirement (*see page 3*), you should go on-line to update your marital status and designate your beneficiaries.

Here's how:

1. Once you have logged in, click on "Profile Information" next to your name in the upper right-hand corner of the page
2. Then click on "VIEW PERSONAL INFO" next to the plan name in the upper left-hand corner of the page
3. Under the Beneficiary Information section on the right-hand side of the page, click on "Change"
4. First click on the correct radio button to select your Marital Status
5. Then select from the dropdown menu under "ADD BENEFICIARY" how many beneficiaries you want to add, and click on "ADD BENEFICIARY"
6. Complete all of the information for your Primary and any Secondary beneficiaries you wish to elect.
7. Finally, click on "APPLY CHANGES" in the bottom right-hand corner of the page to save your beneficiary information.

Do not be concerned that under the "Personal Details" section of the "Personal Information" page your marital status continues to show as "Unknown." Your marital status is stored with your beneficiary information.

# PRUDENTIAL RETIREMENT

## HOW TO SET UP AND REGISTER YOUR ONLINE ACCOUNT

You can either go on-line or register your account through the Prudential Retirement website at www.prudential.com/online/retirement or you can call Prudential Retirement at (877) 778-2100 and request their help to set up your account.

Either way, you will need the following information to register your account:

- Social Security number
- Date of birth
- Home zip code

Once your account is set up and registered, log in to your online account and click on the GET STARTED NOW button at the bottom of the box on the left-hand side. This will walk you through a notification of the automatic enrollment process and identify the changes you can make to your account set-up.

Once your account is set up and register,  you can log in at any time (using the username and password you create) to review your balance and investment performance, make changes to your investments, increase or decrease your contribution into you 401(k), 457 and/or ROTH 401 (k).  You will also be able to access some great tools to assist you in your retirement planning.

By the way, if you *do not register* your account, your funds will still be in the account under your name with Prudential Retirement.

# <u>URS</u>: How to Update / Change Beneficiary Information

*[Utah State Retirement Systems (URS) only]*

### *How Do I Log In To The URS Website?*
Log in www.URS.org
Click on Members
Click on Access Your Account
Click on Sign up for ***myURS***

Your Utah Retirement Systems (URS) quarterly statement contains your URS account number. You will need this number to set up you individual ***myURS*** account. **Example: URS Account Number:** **W12345678**

### What is *myURS*?

***myURS*** provides personal account access over the internet to your pension and *savings plans (401(k), 457, IRAs) information. Here you'll be able to view information such as: years of service credit, beneficiaries, and savings plan balances. You will also have the ability to make changes to some of your personal information and savings plan options. **NOTE*: *Savings Plan options are not available for Utah County Government Tier 1 employees. The 401(k) is available to Utah County Government Tier 2 employees; however, the 457 and IRAs are not available options.*

### How can I use *myURS*?

- First, you must be a URS member with either a savings or retirement plan.
- Next, you need to set up a PIN if you have not already done so.
- Finally, log on to ***myURS*** with your URS ID and PIN.

### What is *myURS* ID and URS PIN?

URS ID - **Your URS ID is either your social security number or your member account number (they can be used interchangeably).**
URS PIN - **Your PIN is a 4 to 12 digit number you have set up via *myURS*.**

**Where can I find my account number?** **You can find your account number on your quarterly statement.**

**How do I set up a PIN?** **You'll need to be prepared to provide your social security number, birth date, and account number.**

### *How to set up your PIN through myURS:*

1. Click on the "Create account" link or "Forgot your PIN."
2. Enter your social security number, account number, date of birth, and your desired numerical PIN.
3. Once you have successfully entered your information, you will be able to log into ***myURS*** using your URS ID (your ID is either your SSN or account number) and PIN.
4. A confirmation stating that your PIN has been setup will be mailed to you.

You may change your PIN at any time within ***myURS***. At your request, your PIN can be frozen so that your account cannot be accessed. If you have questions or encounter difficulties with this process, please call the URS customer service department at (801) 366-7720 or (800) 688-4015 (press "0" to speak to a representative).

# HEALTH EQUITY How to Update / Change Beneficiary Information

*[Health Savings Account / HSA – only]*

You can set up, add and/or change your Health Savings account (HSA) beneficiaries online, by phone or by completing and submitting a hard copy Beneficiary Designation Form directly to Health Equity.

- **By Phone**: Health Equity Member Services phone number: (866)-346-5800
- **Online**: Log in to the Health Equity website: www.healthequity.com

Once you are logged in to the Health Equity website, click on the **My Profile** Link.

You will need the following information when setting up and /or updating your beneficiary information:

- First and Last Names
- Social Security Number
- Relationship
- Date of Birth
- City, State and Zip Code

This page will allow you to update and manager your personal information, account information, and beneficiary information. You can also manage your payments, email settings, electronic records and log in settings from this page.

- **Hard Copy Beneficiary Designation Form**: Log in to the Health Equity website at www.healthequity.com. Click on the "Resources" tab and then click on the "Resource Documents" link. A variety of forms are available, including the Beneficiary Designation form. Print and complete the form. Mail or fax the completed form to Health Equity.

**HealthEquity**
Attn: Members Services
15 W. Scenic Pointe Drive, Ste 100
Draper, Utah 84020
Fax no.: 801-727-1005

**Health Equity is available 24 hours a day, 7 days a week!**