

## Adding or Updating Contacts

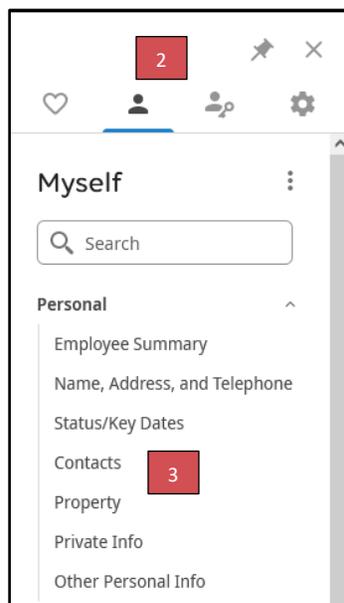
It is essential to keep your personal information up to date in our UKG Pro system. In addition to updating your own demographic information, it is equally important to provide and maintain accurate contact details for your dependents. This information enables HR to coordinate effectively with our various benefit vendors and ensures we have the necessary emergency contacts on file for you. This document provides comprehensive instructions on how to add or update contact information using the UKG Pro website.

### Instructions

Navigate to Contacts

Upon logging in to UKG Pro, the UKG Dashboard will appear.

1. Navigate to **Menu** on the left – side of the UKG dashboard.
2. From the menu, select **Myself**.
3. Select Personal > **Contacts**.



Adding a Contact

1. Select **Add**.
2. Check the Contact is **Active** box.
  - a. The contact is active, and if eligible, appears when enrolling in benefit plans via Life Events or Enrollment. This is the default setting.
3. Enter the contact's personal information such as **legal name, SSN (if applicable), gender, and birth date**.
4. Select the contact's **relationship** to the employee.
5. Designate the contact as a **dependent, beneficiary, or emergency contact**. More than one option can be selected.
6. Select **Save**.



# Adding or Updating Contacts

**Contacts**

**Add/Change Contact**

Contact is active

**Personal**

First  SSN

Middle  Date of birth

Last  Gender

Former last  Date of marriage

Suffix  Date of divorce

Deceased

Employer

Occupation

**Designation**

Select at least one designation for this contact. **Note:** Identifying this record as a **Dependent** or **Beneficiary** only makes them eligible for consideration, it does not automatically add them to any benefit plans.

Relationship  Designation  Dependent

Beneficiary

Emergency contact

## Updating an Existing Contact

1. Select the existing contact.
2. Click on the **Edit** icon.
3. Make any necessary updates or inactive contact.
  - a. The contact is inactive and does not appear as eligible during enrollment sessions. An example of when to inactivate someone is when a divorce occurs.
4. Select **Save**.

**Contacts**

Status

Name ↑	Relationship	Designation
<a href="#">Duck, Donald</a>	Cousin	<input checked="" type="checkbox"/> Beneficiary <input checked="" type="checkbox"/> Dependent <input type="checkbox"/> Emergency contact

**Duck, Donald**

**Add/Change Contact**

**Information**

This contact cannot be deleted because of associations with existing benefit plans.

Contact is active

**Personal**

First  SSN

Middle  Date of birth

Last  Gender

Former last  Date of marriage

Suffix  Date of divorce

Deceased

Employer

Occupation

**Designation**

Select at least one designation for this contact. **Note:** Identifying this record as a **Dependent** or **Beneficiary** only makes them eligible for consideration, it does not automatically add them to any benefit plans.

Relationship  Designation  Dependent

Beneficiary

Emergency contact

**Address** **Telephone**

Need help? Email Payroll at [payroll@swhealth.com](mailto:payroll@swhealth.com)