Adding or Updating Contacts

It is essential to keep your personal and dependent information up to date in the UKG Pro system. Accurate contact details ensure HR can coordinate effectively with benefit vendors and maintain the necessary emergency contacts on file.

This guide provides step-by-step instructions to help employees:

- Update personal demographic information in the UKG Pro website
- Add or edit dependent contact details to ensure accuracy
- Maintain emergency contacts for HR and organizational needs
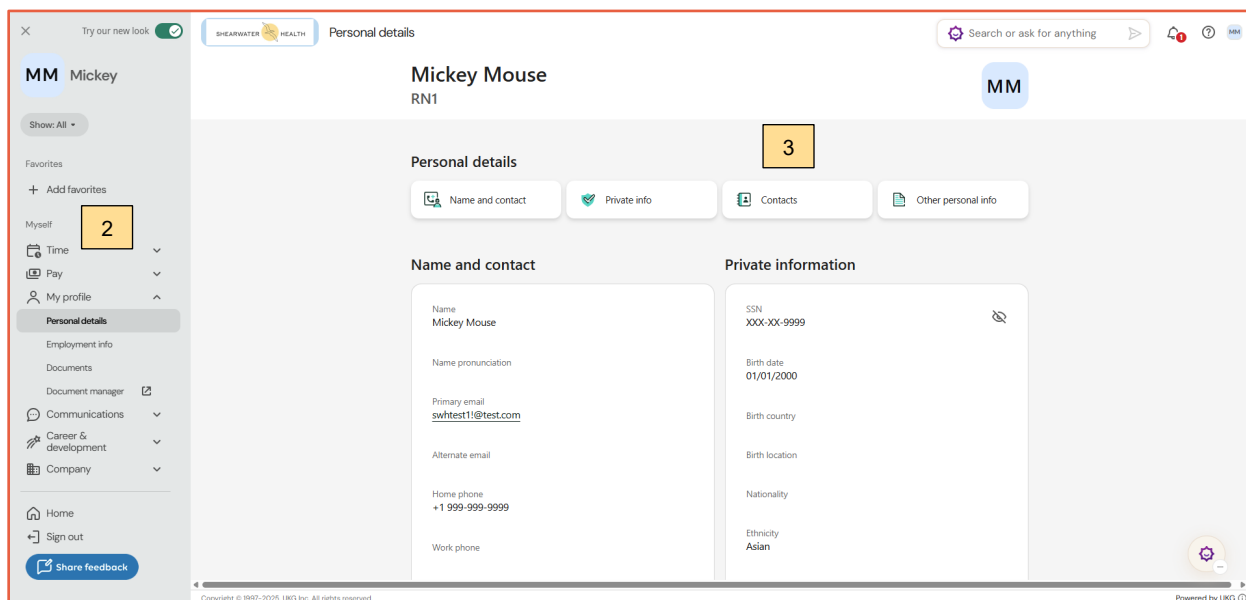- Support benefit coordination by keeping records current and reliable

By following these instructions, employees can successfully manage their contact information in UKG Pro, ensuring both personal and dependent records remain accurate and complete.

Instructions:

Navigate to Contacts

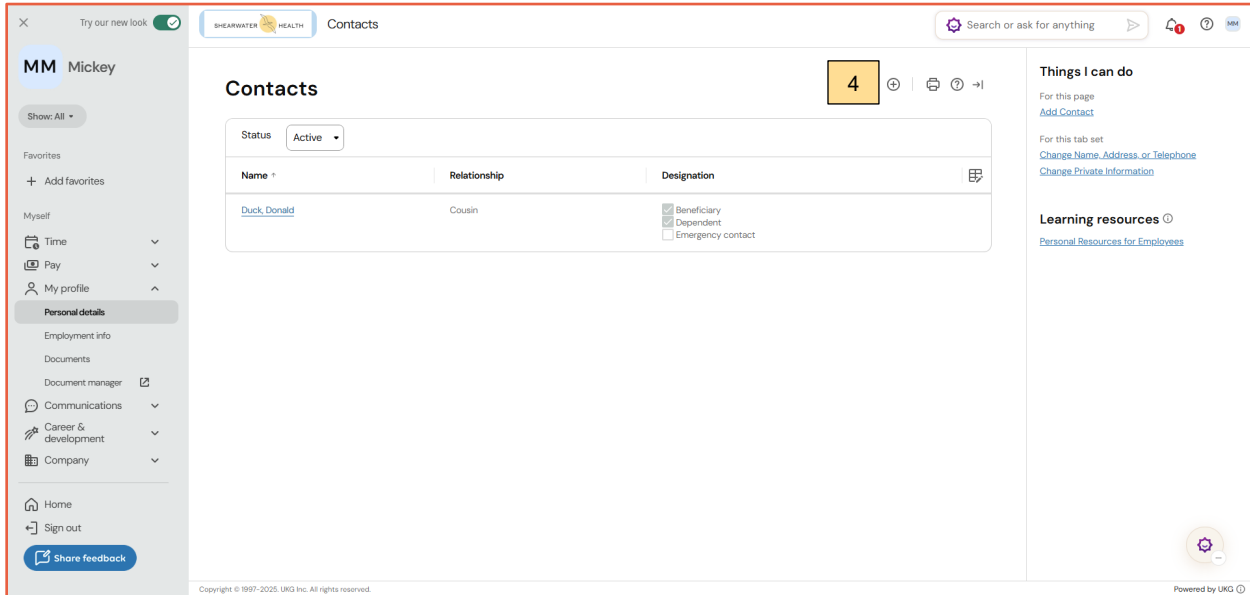Upon logging in to UKG Pro, the UKG Dashboard will appear.

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

Adding a Contact

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

9. The address will auto populate based on employee's address. There is a box to check for you if the address is different.
10. Select **Save**.

Updating an Existing Contact

11. Select the existing contact.
12. Click **Edit**.
13. 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.
14. Select **Save**.

SHEARWATER HEALTH

Contacts

Contacts

Search or ask for anything

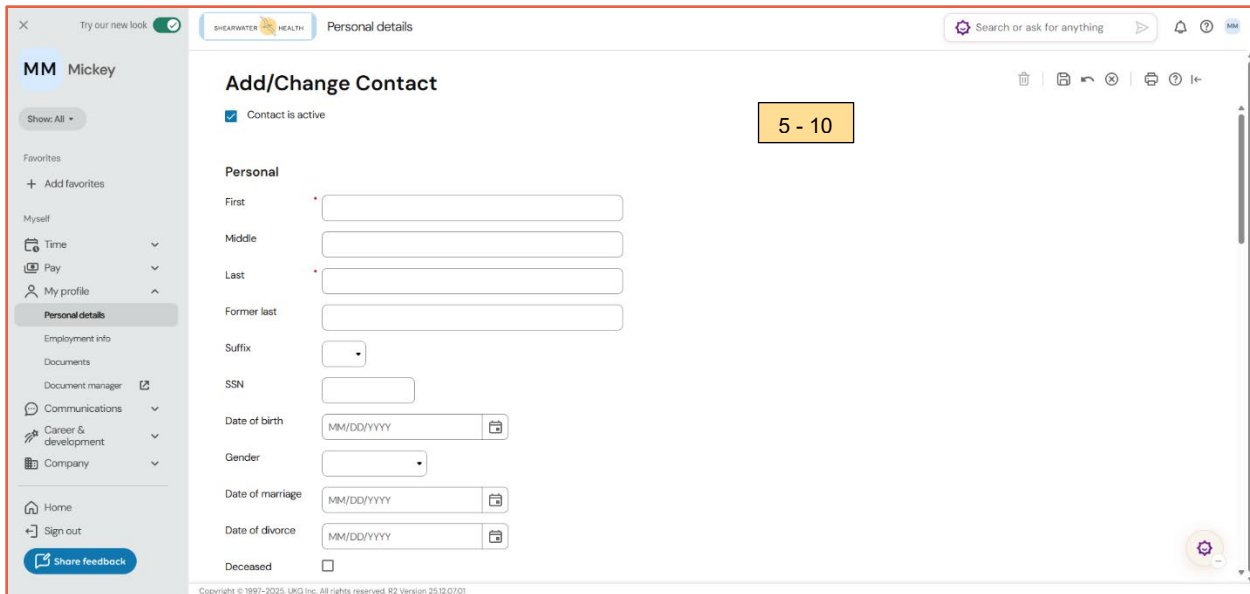**Things I can do**

For this page
Add Contact

For this tab set
Change Name, Address, or Telephone
Change Private Information

Learning resources
Personal Resources for Employees

MM Mickey

Show: All

Favorites
+ Add favorites

Myself
- Time
- Pay
- My profile
  - Personal details
  - Employment info
  - Documents
  - Document manager
- Communications
- Career & development
- Company

Home
Sign out
Share feedback

Status: Active

Name ↑	Relationship	Designation	
Duck, Donald	Cousin	☑ Beneficiary ☑ Dependent ☐ Emergency contact	

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Personal details

MM Mickey

Show: All

Favorites
+ Add favorites

Myself
- Time
- Pay
- My profile
  - Personal details
  - Employment info
  - Documents
  - Document manager
- Communications
- Career & development
- Company

Home
Sign out
Share feedback

Duck, Donald

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Personal

SSN	111-11-1111
Date of birth	02/13/1986
Gender	Male
Date of marriage	
Date of divorce	
Employer	
Occupation	

Designation

Relationship	Cousin

☑ Dependent
☑ Beneficiary
☐ Emergency contact