SABS Online Beneficiary Designation Form Instructions:

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**Treasurers**

1. Log into UConntact.

2. Open the SABS Online Beneficiary Designation Form using the following link: https://uconntact.uconn.edu/submitter/form/start/457826.

3. Click on NEW SUBMISSION box.

4. Choose your organization from the drop down list:
   a. If a new organization, choose NEW from the list and then enter the name of your organization.
   b. Enter your organization name exactly as it appears on UConntact.

5. Click NEXT.

6. Enter information about the designated beneficiary of your organization who will receive the funds in the SABS bank account, should the organization disband:
   a. The beneficiary cannot be a person.
   b. The beneficiary contact does not have to be a specific person, but should be the best way to contact the beneficiary for receiving payments.

7. Check the box indicating your approval of the terms and conditions.

8. Click NEXT.

9. **Copy Page 2 of these instructions into an email.**

10. **Send the email to the President you listed on the Banking Contract.**
    a. NOTE - In UConntact members on the banking contract are referred to as Reviewers.

11. On the form – enter the **UConn email** of the President you listed on the Banking Contract:
    a. **CRITICAL** - this is the only way the President can see and approve the beneficiary.

12. Click NEXT.

13. You may use the links in the Submission section to go back and edit/review any information.

14. Click SUBMIT to finalize the form.

15. The President will receive an email to review the form from UConntact. They must open the form, review the data, and approve or deny the information.

16. SABS will approve the form when the information provided is acceptable and the President has given the form a thumbs up. You will be notified of this approval.

17. Email dsabusinessservices@uconn.edu if you have not received an approval notification and would like a status update.
1. Open the email from UConntact with the subject line “Review Form Submission: SABS Online Beneficiary Designation Form.”

2. Click the blue Review Submission box in the email to open the form.

3. Click Expand All and review the contract information.

4. If you agree with the beneficiary information:
   a. Click the thumbs up symbol next to your name.
   b. Scroll to bottom of the screen.
   c. Type “Approved” in the Discussion section.
   d. Click Post.
   e. Exit the form.

5. If you do not agree with the beneficiary information:
   a. Click the thumbs down symbol next to your name.
   b. Scroll to bottom of the screen.
   c. Type your reason for not agreeing in the Discussion section.
   d. Click Post.
   e. Exit the form.