

## SABS Online Beneficiary Designation Form Instructions:

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### Treasurers Only

1. Click on this SABS link: [Beneficiary Designation Form](#)
2. Login with your NetID Single Sign-On
3. Click **New** in the top right corner of the page
4. In the **Organization** section, select your organization from the drop-down:
5. Type in the Treasurer's name under the **Treasurer** box
6. Type in the President's name under the **President** box
7. Fill in the **Beneficiary Information** section as instructed on the request. We recommend the following:
  - The chosen beneficiary is a charity or an entity/organization that has demonstrated commitment and stability
  - The chosen beneficiary be voted on by the organization's membership and included in the minutes of that meeting
8. Once you have completed the **Beneficiary Information** section, Click **Sign this Form** to sign under **Treasurer's Signature**
9. Click **Submit** under the **Actions** tab on the right-hand side of the request
10. The Approver on the form (which must be the president of the organization) will receive an email from Quali Notifications:
  - a. The subject line will say: "**Approval: SABS Bank Account Beneficiary Designation –Approval Needed**"
11. President must open the form, review the data, sign, and approve or deny the form as submitted
12. SABS will process the form when approval is complete (you will be notified)
13. Email [SABS@uconn.edu](mailto:SABS@uconn.edu) with any questions or problems you encounter

**Presidents Only**

1. Open the email from Quali Notifications with the subject line **“Approval: SABS Bank Account Beneficiary Designation – Approval Needed”**
2. Click the Begin Review box in the email to open the form
3. Review the Beneficiary information
4. If you agree with the information:
  - Click on the “Sign this form” box under **President’s Signature**
  - Type your name in the box to E-sign the form
  - Click Save
  - Click the Approve box in the top right corner of the form (under Actions)
  - Comments are optional, then click Approve
5. If you do not agree with the information in the request:
  - Click the Send Back box in the top right corner of the form (under Actions)
  - Enter reason in the “Add Comments” box and click “Send Back”
6. If you do not want this request to exist or be an Approver for this request:
  - Click the Deny box in the top right corner of the form (under Actions)
  - Enter reason in the “Add Comments” box and click “Deny”