

Workday Instructions: Add and designate beneficiaries

This is a two-step process. The first step involves creating your list of available beneficiaries. The second step is to assign or designate the person.

IMPORTANT:

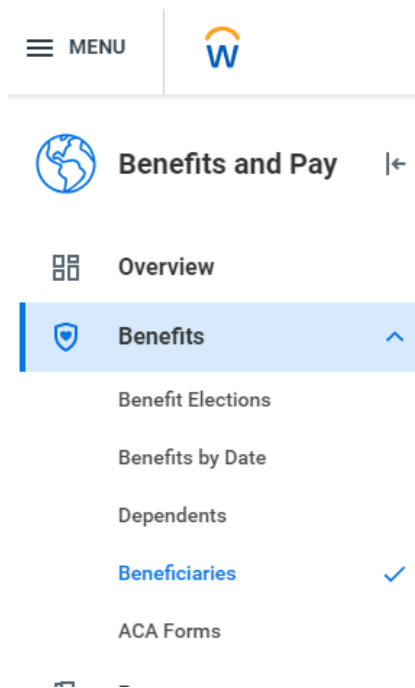
A family member's information can be updated at any time. It is important that you do not replace an existing family member's information with another person's information. For example, in the event of a divorce and new marriage, the former spouse's relationship should be modified to reflect the former spouse. The new spouse should be added as a new family member.

DO NOT change/edit the former spouse's information to reflect the new spouse's information. The same applies when reassigning beneficiaries.

DO NOT replace someone's information with another person's information. Add a new person.

Step 1 - TO ADD Beneficiary(s)

1. Click the **Menu** in the upper left corner of your Workday page
2. Click the **Benefits and Pay** application
3. Click the dropdown arrow next to the Benefits and then click **Beneficiaries**



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3. Click on **Add**

- If you have already entered the individual's information as an emergency contact or a dependent in Workday, you can add them as a beneficiary by choosing the first option on the new screen, otherwise click on **Create a New Beneficiary** for adding a new individual or **Create a New Trust as Beneficiary** if you have a Trust set up then click **OK**:

Add My Beneficiary

- Existing Dependent or Emergency Contact
- Create a New Beneficiary
- Create a New Trust as Beneficiary

4. On the **Add My Beneficiary** screen, enter your beneficiary's information. Be sure to complete all fields with a red star (*). The Contact Information section requires an address. Repeat for each beneficiary. Click **Submit** once finished. Once completed, you have created your list of available beneficiaries. Now you are ready to assign or designate your beneficiary(ies).

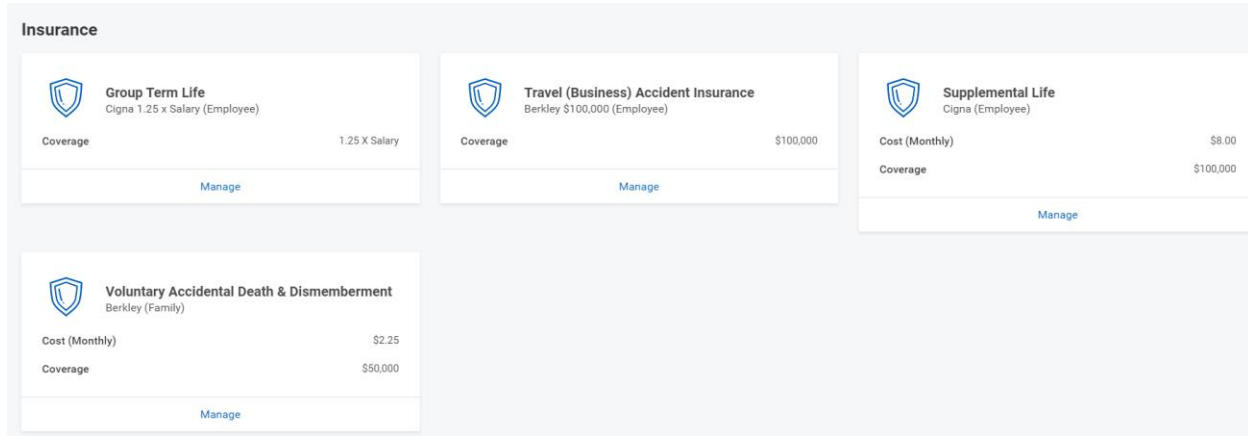
Step 2: Assigning your beneficiaries.

- Click the **Menu** in the upper left corner of your Workday page
- Click the Benefits and Pay application and then click the **Change Benefits** button
- Change Reason- Beneficiary Change
- Benefit Event Date- The date you are completing the event
- Click **Submit** and then **Open**
- Click Let's Get Started:

Let's Get Started

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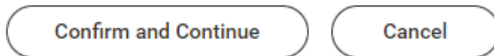
- Under the life insurance you would like to update beneficiary(ies) on click **Manage**:



Insurance

- Group Term Life** (Cigna 1.25 X Salary (Employee))
 - Coverage: 1.25 X Salary
 - Manage
- Travel (Business) Accident Insurance** (Berkley \$100,000 (Employee))
 - Coverage: \$100,000
 - Manage
- Supplemental Life** (Cigna (Employee))
 - Cost (Monthly): \$8.00
 - Coverage: \$100,000
 - Manage
- Voluntary Accidental Death & Dismemberment** (Berkley (Family))
 - Cost (Monthly): \$2.25
 - Coverage: \$50,000
 - Manage

- Review your life insurance and then click **Confirm and Continue** on the bottom of the page



- Select an existing or add a new beneficiary person (or trust) to the life insurance you elected.
 - Click on the + sign to create/open a line. You will need to click on the + sign to create/open a line for each primary and contingent beneficiary.
 - Click on the search prompt to select someone from your previously created list (beneficiary persons).
 - You can add an existing beneficiary or trust or create a new beneficiary or trust:

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

*Primary Beneficiaries 0 items

+	Beneficiary	Percentage
No Data		

Secondary Beneficiaries 0 items

+	Beneficiary	Percentage
No Data		

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

*Primary Beneficiaries

+	Beneficiary	Percentage
-	Existing Beneficiary Persons	
	Existing Trusts	
	Add New Beneficiary or Trust	
	Search	
		0

- Once you have designated the beneficiary/trust, you will need to assign a percentage of the life insurance. The primary beneficiaries must be equal to 100% as well as any contingent beneficiaries. Click **Save** once you are done
- Repeat for each life insurance you would like to make a change to beneficiary to
- Once you have finished, you can click on **Review and Sign**:

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Review and Sign

Save for Later

7. After reviewing your changes, scroll to the bottom of the page and click the **I Agree** button to agree with the Legal Notice and then click **Submit**:

I Accept

Submit

Save for Later

Cancel