

Welcome to Workday Self Service. Within Workday, you can manage your beneficiaries by adding, editing, and changing beneficiary allocation and information. This guide covers general information on how to add beneficiary information. If you have any questions please contact your Benefits Team.



Note: You will need social security numbers, date of birth, and addresses to make add or make modifications to your beneficiaries.

MANAGE BENEFICIARIES

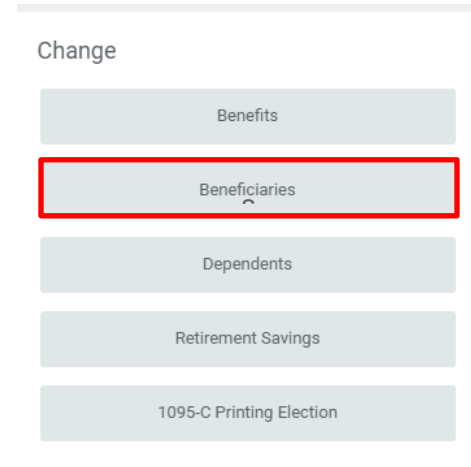
A beneficiary is a designated individual who would receive your Life Insurance Benefit. You can change, edit, and add beneficiaries from the Benefits application.



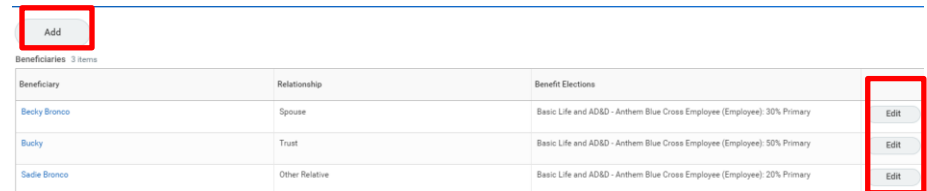
Note: If you are your assigning existing dependents or emergency contacts as beneficiaries, please go to Assigning Beneficiaries section on page 3

From the Benefits application:

1. Click the **Beneficiaries** button under **Change**.



2. View existing beneficiaries for enrollment in benefit plans or modify the existing information by clicking **Edit**. OR
3. Click **Add** to add a new beneficiary. The Add Beneficiary page displays.



5. Select **Existing Dependent or Emergency Contact, New Person as Beneficiary**, or **New Trust as Beneficiary**.

Add My Beneficiary

Existing Dependent or Emergency Contact

Create a New Beneficiary

Create a New Trust as Beneficiary

6. Click **OK**.

OK

Cancel

7. Enter all required information, denoted by an asterisk.

Beneficiary Personal Information

Legal Name

Legal Name *

Bronx Bronco

Relationship

Relationship *

Friend

Date of Birth

Date of Birth

Gender

Gender

8. Click **Submit**.

Submit

Save for Later

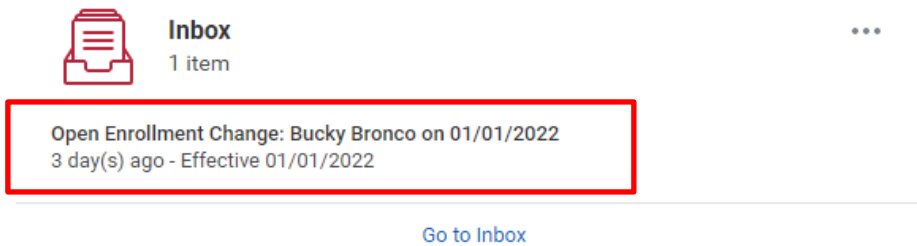
Cancel

ASSIGNING BENEFICIARIES

Employees can view and update beneficiary assignment to Life Insurance(s).

From the Benefits application:

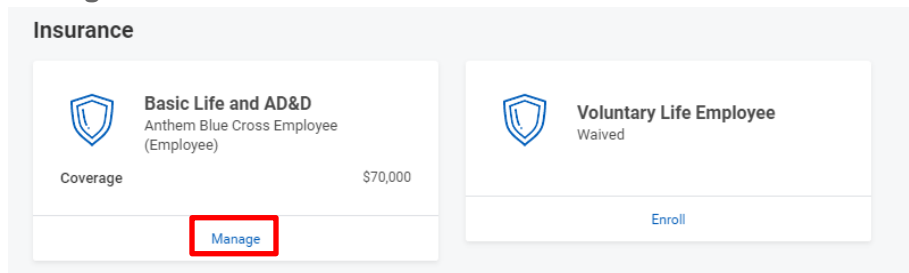
1. Open the **Open Enrollment Event**



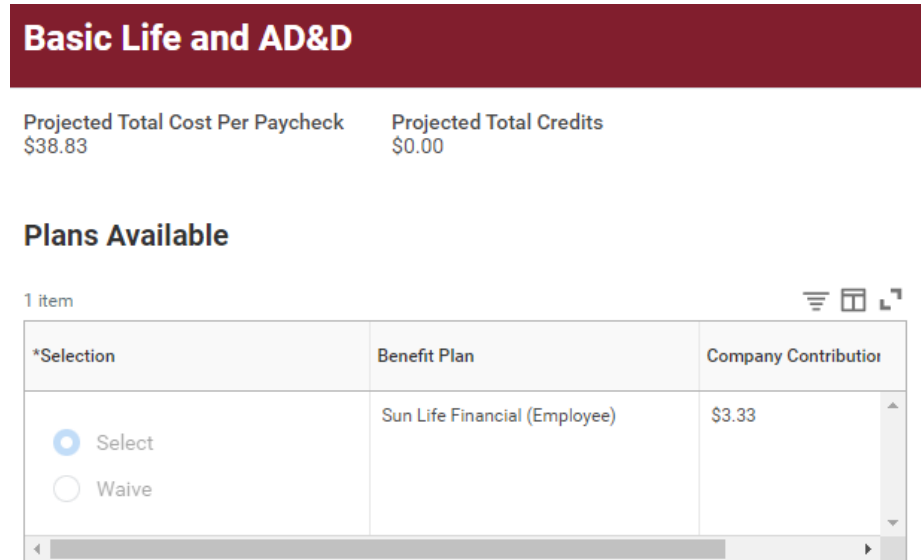
2. Click **Let's Get Started**



3. Scroll down to the Insurance section of the enrollment. Click **Manage** in the Basic Life and AD&D.



4. Review the plan information. Click **Confirm and Continue**



5. Click **Add Icon** In Beneficiary column to add beneficiary.
6. Click the **Prompt Icon** and select **Beneficiary Persons** or **Trust** to see the list of Beneficiaries available.
7. Click the name of the person you want to assign and enter the Primary or Contingent Percentage for the beneficiary.
8. If adding more than one beneficiary to a plan, click the **Add Icon** to repeat the process. . If you are adding more than one beneficiary, the total percentage must equal 100%.

Coverage

Coverage \$70,000

Calculated Coverage \$70,000.00

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 1 item

5	Beneficiary	Percentage
-	6 X Bucky Bronco ...	8 100

- Click **Save** when done.
- When all changes complete you will be brought to the main page, repeat steps 3-9 if you enrolled in Voluntary Life Employee.

Insurance

<p>Basic Life and AD&D Sun Life Financial (Employee)</p> <p>Coverage \$70,000</p> <p>Manage</p>	<p>Voluntary Life Employee Sun Life Financial (Employee)</p> <p>Cost per paycheck \$6.45</p> <p>Coverage \$30,000</p> <p>Manage</p>
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- Review your benefit elections and beneficiaries. Check off the **I Agree** box to provide an electronic signature confirming your changes.
- Click **Submit**

Electronic Signature

LEGAL NOTICE: Please Read

Your Name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I AGREE" checkbox, you are certifying that:

- You understand that your benefit elections are legal and binding transactions.
- You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

Kaiser Enrolled Employees
If you enrolled into SCI's Kaiser plan, this electronic signature acknowledges that you accept the rules and regulations of Kaiser California.

I Agree

[Submit](#) [Save for Later](#) [Go Back](#) [Cancel](#)