Benefits: Manage Your Beneficiaries

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 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.

4. Select Existing Dependent or Emergency Contact, New Person as Beneficiary, or New Trust as Beneficiary.
Benefits: Manage Your Beneficiaries

Add My Beneficiary

- Existing Dependent or Emergency Contact
- New Person as Beneficiary
- New Trust as Beneficiary

6. Click OK.

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

8. Click **Submit**.

Your screens and processes may vary from this document. Confidential ©2019 Workday, Inc.
ASSIGNING BENEFICIARIES

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

From the Benefits application:

1. Click the **Benefits** button under Change.
2. Select **Beneficiary Change** for the **Benefit Event Type**.
3. Click the **Calendar** icon to enter the Benefit Event Date.

4. Click **Submit**.
5. Open the **Change Benefit Election** event.

6. Click **Continue** to **Beneficiary Designations** page.

7. Click **Add Icon** in Beneficiary column to add beneficiary.
8. Click the **Prompt Icon** and select **Beneficiary Persons** or **Trust** to see the list of Beneficiaries available.
9. Click the name of the person you want to assign and enter the Primary or Contingent Percentage for the beneficiary.
10. 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%.
11. Review your benefit election and beneficiaries. Check the I **Agree** checkbox to provide an electronic signature, confirming your changes.

**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 verifying that:

1. You understand that your benefit elections are final and binding, i.e., any changes will only be allowed upon specific conditions.

2. You understand that any changes to your beneficiary designations are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

By checking the "I AGREE" box, you are acknowledging that you have reviewed the plan documents and understand the benefits and are accepting the terms and conditions of your plan.

12. Click **Submit**.