

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.

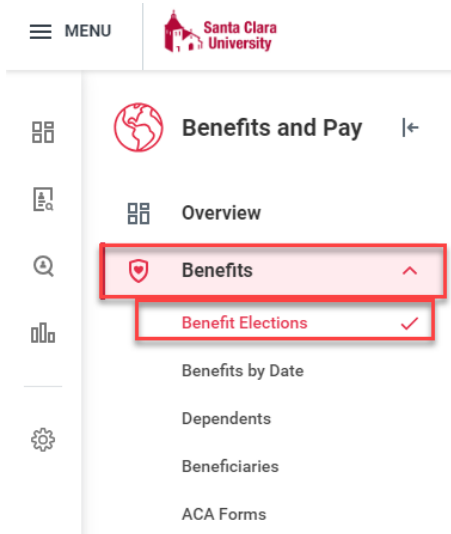


Note: You will need social security numbers, date of birth, and addresses to make add or make modifications to your beneficiaries.

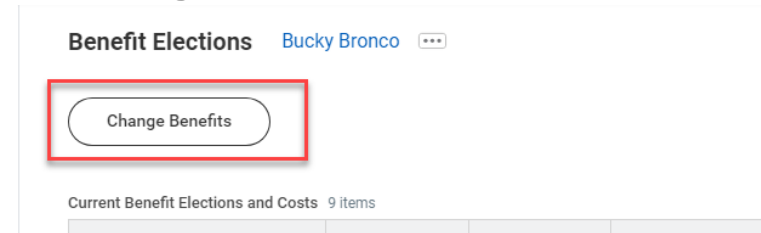
A beneficiary is a designated individual who would receive your Life Insurance Benefit. You can change, edit, and add beneficiaries from the Benefits application.

From the **Benefits and Pay** application:

1. From the Navigator Pane expand **Benefits** and select **Benefit Elections**.



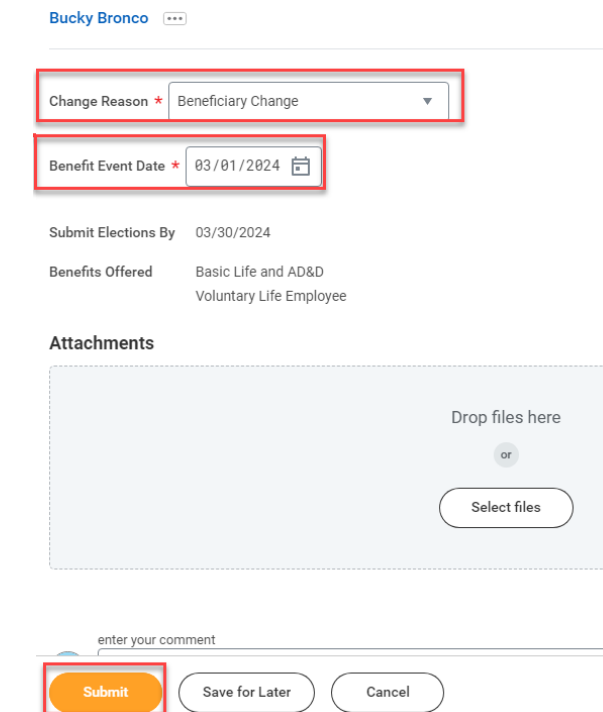
2. Click **Change: Benefits**



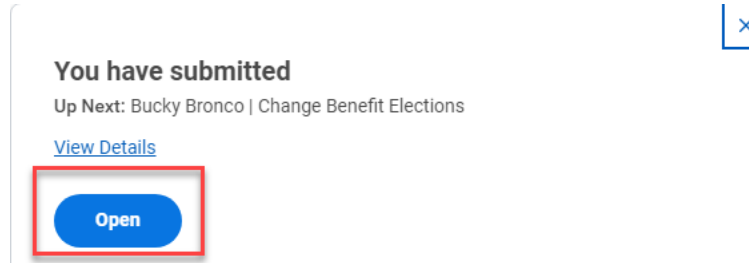
3. Select Change Reason: **Beneficiary Change** and add the effective date.

4. Click the **Calendar** icon to enter the Benefit Event Date.

Click **Submit**



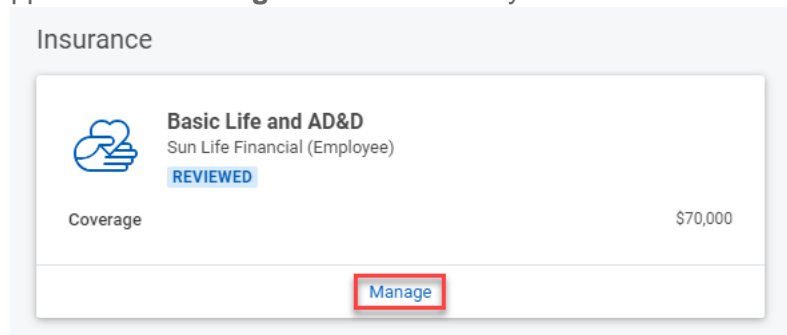
5. Open the **Change Benefit Election** event.



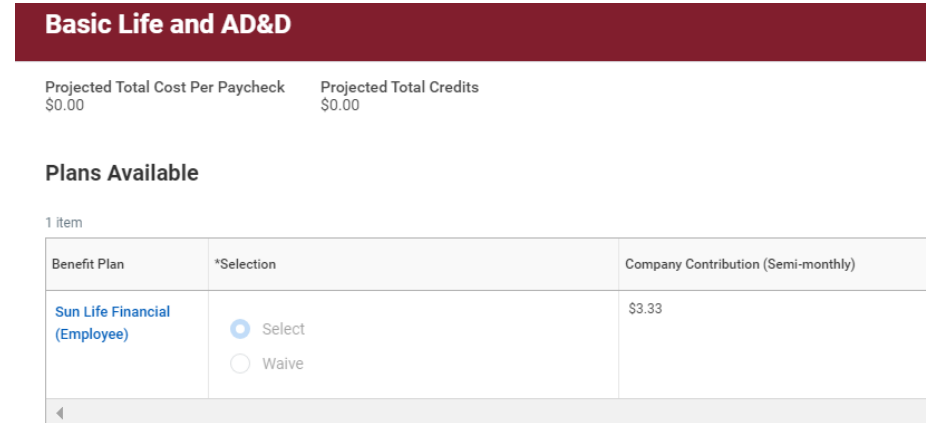
6. Click **Let's Get Started**



7. All Life Insurance Plans that you are enrolled in/can enroll in will appear. Click **Manage** to add beneficiary.



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



9. Click **Add Icon** In Beneficiary column to add beneficiary.
10. Click the **Prompt Icon** and select **Add New Beneficiary or Trust**
11. In the pop up window select if you are adding a **New Beneficiary** or **New Trust**.
12. Enter all required information, denoted by an asterisk.

Add New Beneficiary or Trust Bucky Bronco

Relationship *

Use as Beneficiary ☒

Date of Birth

Age 66 years, 7 months, 15 days

Legal Sex

Allow Duplicate Name ☐

Legal Name Contact Information National IDs Additional Government IDs

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

Legal Name **Contact Information** National IDs Additional Government IDs

Phone

Address

Use Existing Address

Country *

Address Line 1 *

Address Line 2

City *

State *

Postal Code *

County

Usage

Type *

Legal Name Contact Information **National IDs** Additional Government IDs

National IDs 1 item

	*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date	Issued By
	United States of America	Social Security Number (SSN)	000-00-0000		MM/DD/YYYY	MM/DD/YYYY	


OK Cancel

- Click **OK** when done.
- Make sure to add percentage that you are designating for this beneficiary/trust.
- 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%.
- Click **Save** when done.
- When all changes complete you will be brought to the main page with a confirmation message about actions taken. Either update other plans or if done click **Review and Submit**.

Beneficiary Change

Projected Total Cost Per Paycheck \$0.00 Projected Total Credits \$0.00

Insurance




Basic Life and AD&D
Sun Life Financial (Employee)

REVIEWED

Coverage \$70,000

Manage



Voluntary Life Employee
Waived

Enroll

Review and Sign Save for Later

- Review your benefit elections and beneficiaries. Check off the **I Agree** box 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 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 SCU'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

- Click **Submit**