

Making Beneficiary Changes in Workday

On this Job Aid:

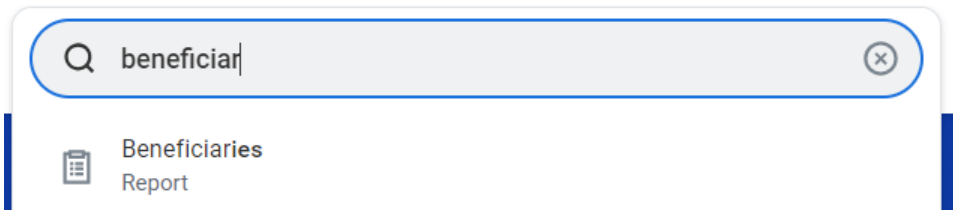
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Adding/Updating Beneficiary Information

Workday maintains beneficiary information for your Basic Life and AD&D and Voluntary Supplemental Life policies. You can change your beneficiaries any time by following the steps outlined below.

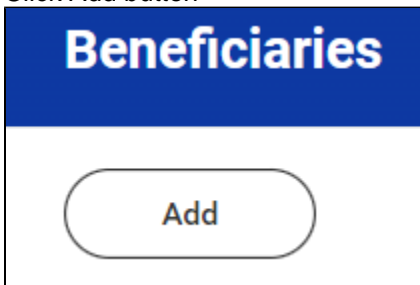
NOTE: Beneficiary information for Lynn's 403b retirement plan is maintained by TIAA. To change/update your beneficiary information for your retirement plan, you need to contact TIAA either online or by phone.

1. Log into Workday
2. Search and select Beneficiaries

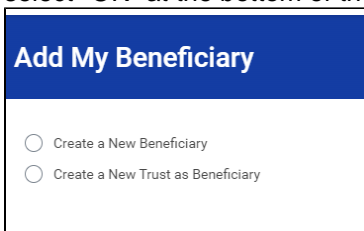


To Create a Beneficiary

1. Click Add button



2. Select the Add button and select "Create a New Beneficiary" or "Create a New Trust as Beneficiary" and select "OK" at the bottom of the page

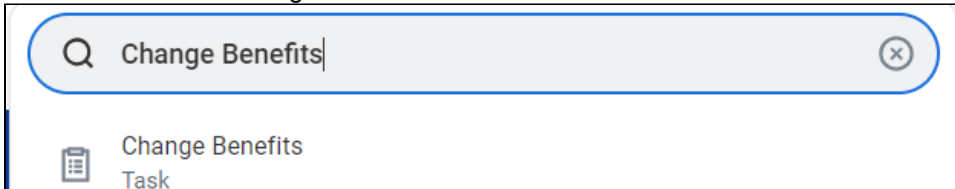


3. Enter the legal name, relationship, and address details of the beneficiary

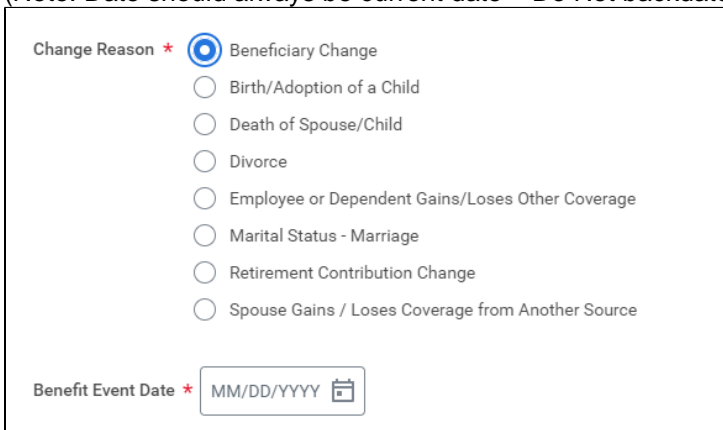
4. Click on Submit and then Done
5. Repeat the above process for each beneficiary
6. Once complete, go back to your benefits home page

Adding or Changing Your Beneficiary

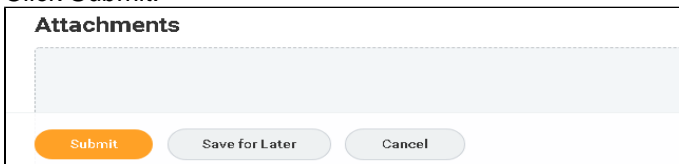
1. Search and select Change Benefits task



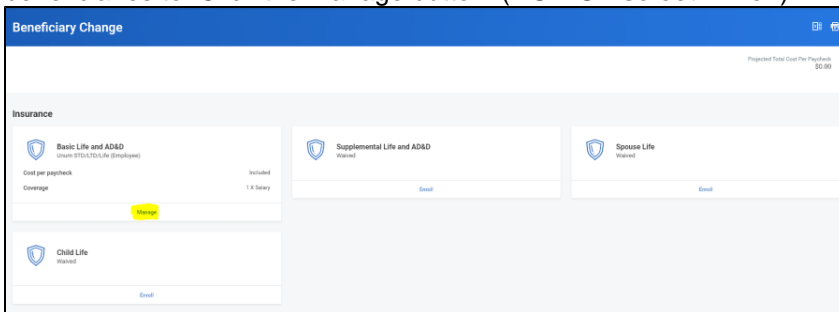
2. On the Change Benefits Screen, select Beneficiary Change for the change reason and enter today's date (Note: Date should always be current date – Do Not backdate)



3. Click Submit.



4. An OPEN button will appear on the next screen – Click it.
5. A LET'S GET STARTED button will appear on the next screen – Click it.
6. The Beneficiary Change screen lists Insurance benefits for which beneficiaries can be assigned. Any item that has a "Manage" button under it is a benefit that you personally are enrolled in and may assign beneficiaries to. Click the Manage button. (**DO NOT select Enroll**)



7. The next screen is titled with the specific plan you have chosen to manage. This screen is for informational purposes and does not allow you to edit. Click the Confirm and Continue button

Basic Life and AD&D

Planned Total Cost Per Paycheck: \$3.00

Plans Available

Selection	Benefit Plan	You Pay (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Unselect	Union STD/STD/Life (Employee)	Included	\$3.40

Confirm and Continue **Cancel**

8. Click on **+** button next to Beneficiary and click in the blank field that appears below. Choose "Existing Beneficiary Persons." Click on the beneficiaries you'd like to assign to that benefit.

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 Beneficiary **Existing Beneficiary Persons**

Beneficiary	Percentage
<input checked="" type="radio"/> john doe	0

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

9. To add more than one beneficiary to Primary or Secondary, click the **+** button next to Beneficiary to provide another empty field

! Assign a Percentage to each Beneficiary – Ensure percentages add up to 100% for Primary and 100% for Secondary (if applicable).

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 2 items

Beneficiary	Percentage
<input checked="" type="radio"/> Bob Smith	50
<input checked="" type="radio"/> Susan Smith	50

Secondary Beneficiaries 1 item

Beneficiary	Percentage
	0

Save **Cancel**

10. When you have finished adding beneficiaries, click Save.
11. You will be back to the Beneficiary Change screen. Continue adding beneficiaries to any other benefits that show "Manage" in their box, if finished, Click Review and Sign.

Insurance

Basic Life and AD&D
Unum STD/LTD/Life (Employee)

Cost per paycheck

Coverage

[Manage](#)

Child Life
Waived

[Enroll](#)

[Review and Sign](#) [Save for Later](#)

12. You will be taken to a View Summary screen. Review and Click "I Accept" box at the bottom of page. Then 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

- You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from you
- You understand and acknowledge that under the Internal Revenue Code regulations rules, you may not change your be
- You understand that you will not pay income tax or FICA tax on my medical, dental, vision, and Flexible Spending Acco
- Company-provided life insurance that exceeds \$50,000 may be subject to imputed income.
- Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you
- If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other m

REPRESENTATION. I have read or had read to me the completed application and understand that any misstatement or misrep recorded. **AUTHORIZATION TO OBTAIN AND DISCLOSE CERTAIN DATA (FOR LIFE AND CRITICAL ILLNESS).** I authorize any phy. my health including my prescription medication history to give to AHL, its subsidiaries or its reinsurers any information. I also that information, once disclosed, may no longer be protected by federal rules governing privacy and confidentiality. I acknowle This authorization is valid for 24 months from the date signed. I understand that I may revoke this authorization at any time b

FRAUD NOTICE: Any person who knowingly and with intent to injure, defraud or deceive any insurer, files a statement of claim

I Agree ☒

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

13. The next screen is the Submitted Screen. It should show "Success, You're Enrolled."

You may click on View and Print your Benefits Statement or Click DONE at the bottom of page.