

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.

Step 1 - TO ADD Beneficiary(s) (This example will show how to add someone to your list of available beneficiaries.)

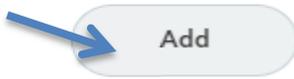
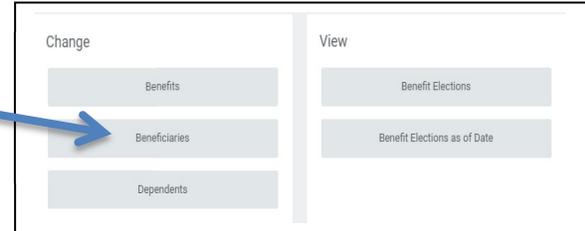
1. Go to your Workday Home page, click the Benefits application.

2. Under Change, select Beneficiaries

2. Click on **Add**



Benefits



Add My Beneficiary

Existing Dependent or Emergency Contact

New Person as Beneficiary

New Trust as Beneficiary

If you have already entered 1 or more existing contacts in Workday, click on this list icon. Information may already be prefilled.

If you need to add a new person or Trust, select the appropriate option. Note, beneficiaries need to be added one at a time.

Click **OK**.

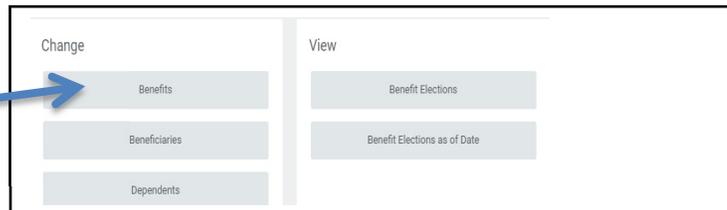
On the **Add My Beneficiary** screen, enter your beneficiary's information. Be sure to complete all fields with a **red ***. The **Contact Information** section requires an address. Repeat for each beneficiary. Be sure to click submit when finished. Once completed, you have created your list of available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

Step 2: Assigning your beneficiaries.

Go to your Workday home page.

Click on **Benefits** worklet.

Under **Change**, click on **Benefits**.



Benefit Event Type *

- Adoption
- Beneficiary Change
- Birth
- Divorce
- Gain of Other Coverage
- HSA - Amend Election
- Loss of Other Coverage
- Marriage
- Voluntary Life and ADD Insurance

Benefit Event Date *

Submit Elections By (empty)

Enrollment Offering Types (empty)

Select Beneficiary Change and Enter a Date.

As soon as you enter a date the two fields marked (empty) will populate with a 1) a deadline date to complete the event date and 2) your applicable benefits.

Click **Submit**.

The next screen will acknowledge that you have submitted a benefit event. To complete the event click on **OPEN**.

Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 5 Items

Benefit Plan	*Elect / Waive	Coverage Level
Group Term Life - Cigna 1.25 x Salary (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	1.25 X Salary
Travel Accident Insurance - Reliance Standard \$100,000 (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$100,000
Supplemental Life - Cigna (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$40,000
Voluntary Accidental Death & Dismemberment - Reliance	<input type="radio"/> Elect	

The first screen is a list of your insurance plans and your current benefit amount. Review and click **Continue**.

Note: 401(k), 457(b) and Retirement plan beneficiaries are completed on the Fidelity web site; www.netbenefits.com

A Beneficiary Designation(s) is required for each benefit plan listed.

- Click on the + sign to create/open a line. You will need to click on the + sign to create/open
- Click on the search prompt to select someone from your previously created list (beneficiary
- See Benefits Library, [Beneficiary Instructions](#) for assistance.
- Your Workday Beneficiary Designation(s) can be updated at any time.
- IMPORTANT:** Beneficiary designations for the 401(k), 457(b) and Employee's Retirement

Click on the plus sign to add a line. You will need to "add a line" for each person you will include as a beneficiary. After you have added your beneficiary(ies) you will then indicate the percent of proceeds and if they will be a primary or contingent beneficiary.

A contingent beneficiary is awarded the benefit if both you and your primary beneficiary(ies) is deceased.

You will repeat these steps under each benefit plan.

Beneficiary Designations 2 Items

Benefit Plan	Requires Beneficiary
Group Term Life - Cigna 1.75 x Salary (Employee)	<input checked="" type="checkbox"/> (+)
Travel (Business) Accident Insurance - Reliance Standard \$200,000 (Employee)	<input checked="" type="checkbox"/> (+)

Line created

A Beneficiary Designation(s) is required for each benefit plan listed.

- 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).
- See Benefits Library, [Beneficiary Instructions](#) for assistance.
- Your Workday Beneficiary Designation(s) can be updated at any time.
- IMPORTANT:** Beneficiary designations for the 401(k), 457(b) and Employee's Retirement Plan must be updated on your Fidelity account; www.netbenefits.com

Beneficiary Designations 3 Items

Benefit Plan	Requires Beneficiary	*Beneficiary	Beneficiaries	
			*Primary Percentage / Contingent Percentage	
Group Term Life - Cigna 1.25 x Salary (Employee)	<input checked="" type="checkbox"/>	(+)		
		(-)		
Supplemental Life - Cigna (Employee)	<input checked="" type="checkbox"/>	(+)		

Next, click on the search button

A Beneficiary Designation(s) is required for each benefit plan listed.

- Click on the + sign to create/open a line. You will need to click on the + sign to create/open
- Click on the search prompt to select someone from your previously created list (beneficiary
- See Benefits Library, [Beneficiary Instructions](#) for assistance.
- Your Workday Beneficiary Designation(s) can be updated at any time.
- IMPORTANT:** Beneficiary designations for the 401(k), 457(b) and Employee's Retirement

Beneficiary Designations 3 Items

Benefit Plan	Requires Beneficiary
Group Term Life - Cigna 1.25 x Salary (Employee)	<input checked="" type="checkbox"/> (+)
	<input type="checkbox"/> (-)

Beneficiary Persons

Trusts

Create

www.netbenefits.com

Beneficiaries

*Primary Percentage / Contingent Percentage

Primary Percentage

Contingent Percentage

Click **Beneficiary Persons** to access your list of beneficiaries (if they have already been added) or select **Create** to add them. When in doubt, check your **Beneficiary Persons** list first. A beneficiary or dependent should be entered one time only.

When you select **Create**, select **Add Beneficiary Using Existing Contact** if you have already added someone as an existing or emergency contact. Select **Add Beneficiary** if you did not add your beneficiary as an existing contact. Select **Add Trust** if you need to add your trust.

A Beneficiary Designation(s) is required for each benefit plan listed.

- Click on the + sign to create/open a line. You will need to click on the + sign to create/open
- Click on the search prompt to select someone from your previously created list (beneficiaries)
- See Benefits Library, [Beneficiary Instructions](#) for assistance.
- Your Workday Beneficiary Designation(s) can be updated at any time.
- IMPORTANT:** Beneficiary designations for the 401(k), 457(b) and Employee's Retirement

Beneficiary Designations 3 items

Benefit Plan	Requires Beneficiary	
Group Term Life - Cigna 1.25 x Salary (Employee)	<input type="checkbox"/>	<input type="button" value="+"/>
		<input type="button" value="-"/>

← Create

- Add Beneficiary
- Add Beneficiary Using Existing Contact
- Add Trust

search

Based on your election, complete the requested information.

Fields with a red * must be completed.

Fields without a red * are optional.

If you are selecting more than one primary beneficiary you will need to indicate a percent to be shared between them. The percent must equal 100%.

Add Beneficiary Test#1 Employee Actions

Enter your beneficiary information.

Relationship *

Use as Beneficiary

Date of Birth MM / DD / YYYY

Age (empty)

Gender select one

Full-time Student

Student Status Start Date

Student Status End Date

Disabled

Allow Duplicate Name

Legal Name | Contact Information | National IDs | Additional Gov

Country * United States of America

Prefix

First Name *

Middle Name

Last Name *

Suffix

Primary Percentage

Contingent Percentage

Repeat the step if you will be indicating more than one contingent beneficiary.

Primary Percentage

Contingent Percentage

Once completed, press **Continue**.

The final step includes reviewing your beneficiary designations, reviewing the **Legal Notice**, checking the **I Agree** box, and clicking **Submit**. Your Beneficiary Change election will not be complete until you have **Submitted** your election.

Beneficiaries may be updated at any time.