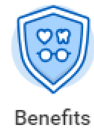
Workday Instructions: Add and designate beneficiaries

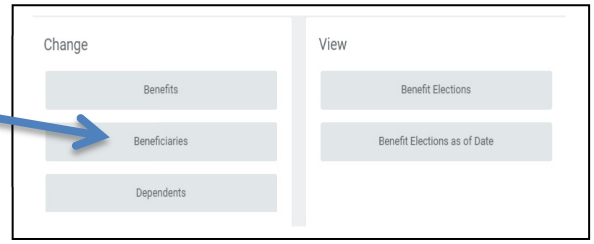
This is a two-step process. The first step involves creating your list of available beneficiaries. The second step is to assign or designate the person.

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

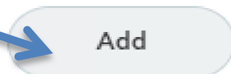
1. Go to your Workday Home page, click the Benefits application.



2. Under Change, select Beneficiaries



2. Click on **Add**



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

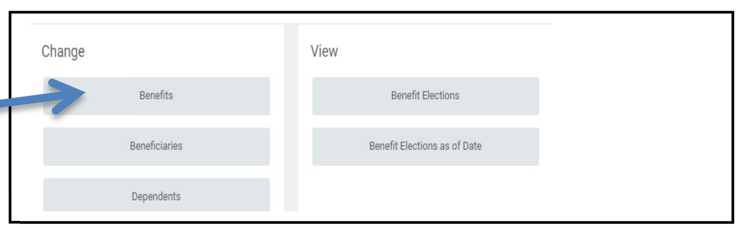
If you need to add a new person or Trust, select the appropriate option. Note, beneficiaries need to be added one at a time.

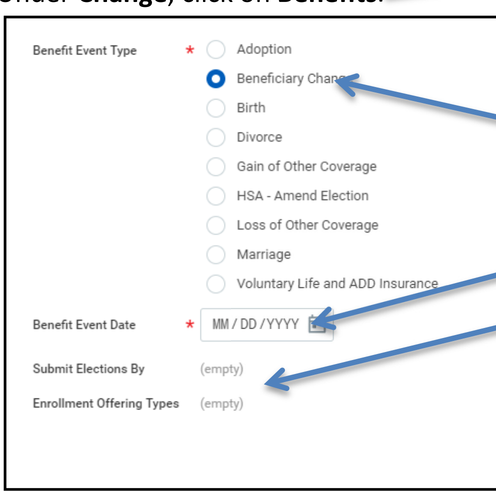
Click **OK.**

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.**



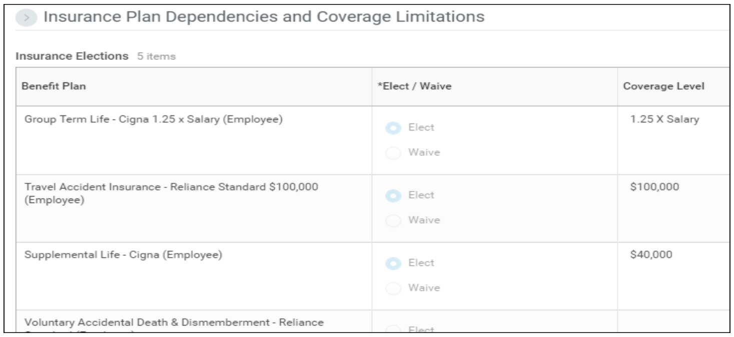


Select Beneficiary Change and Enter a Date.

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**.



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

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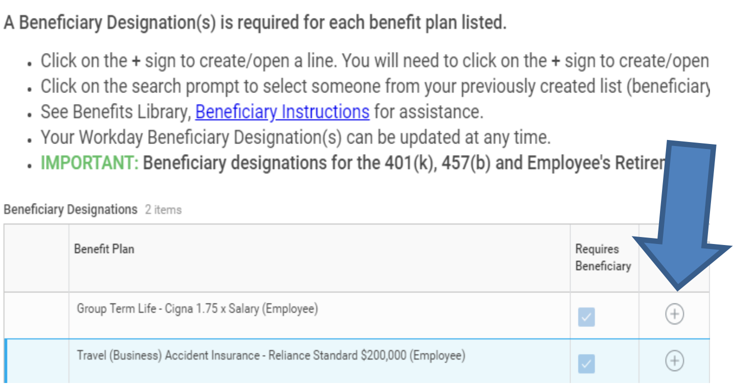
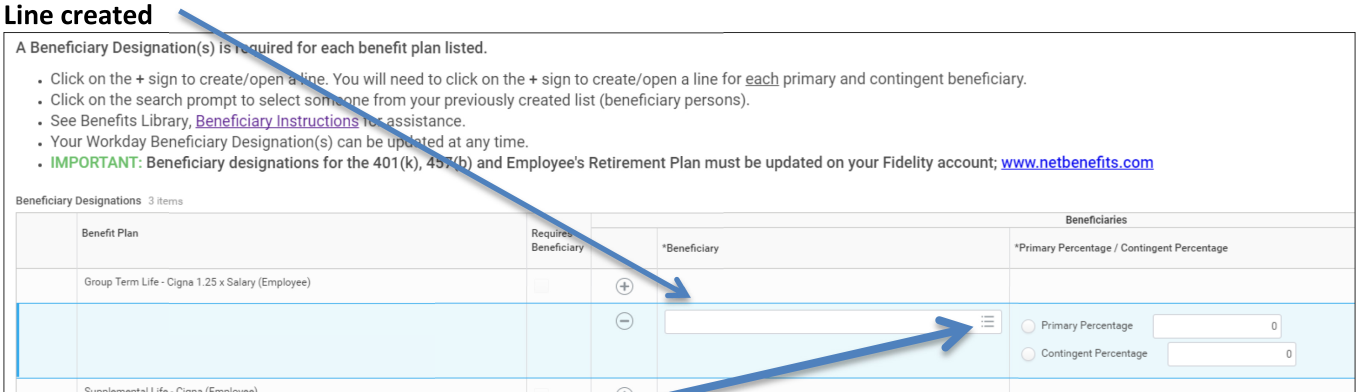


Click on the plus sign to add a line. You will need to "add a line" for each person you will include as a beneficiary. After you have added your beneficiary(ies) you will then indicate the percent of proceeds and if they will be a primary or contingent beneficiary.

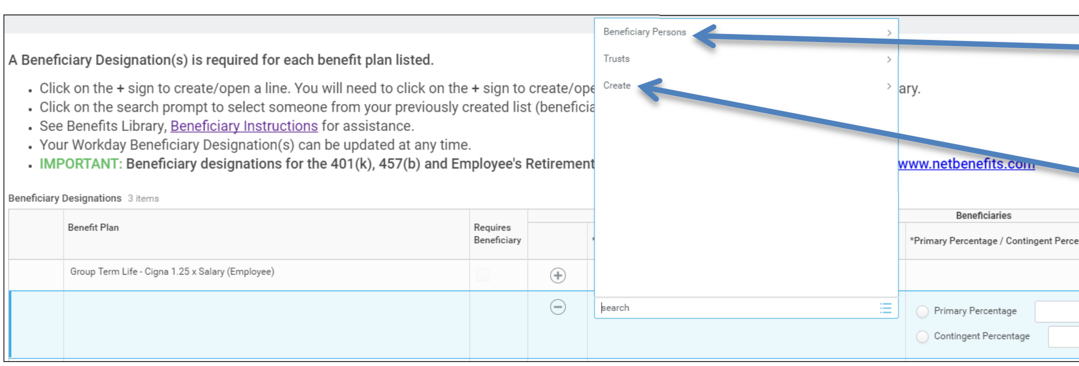
A contingent beneficiary is awarded the benefit if both you and your primary beneficiary(ies) is deceased.

You will repeat these steps under each benefit plan.

Line created

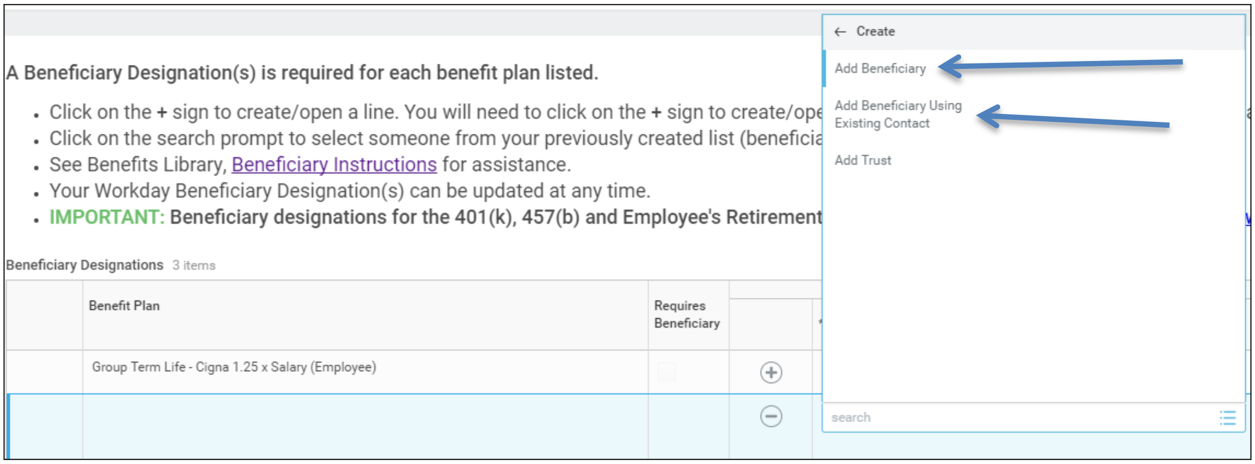


Next, click on the search button



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.

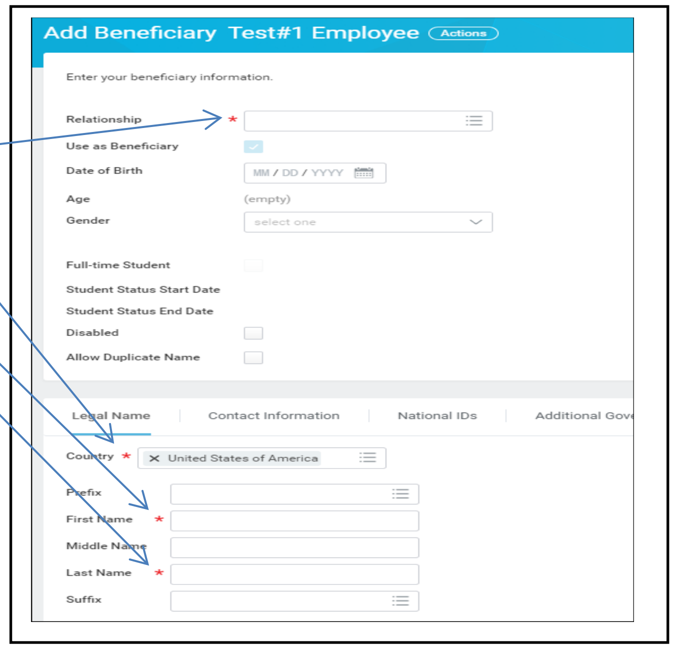
When you select **Create**, select **Add Beneficiary Using Existing Contact** if you have already added someone as an existing or emergency contact. Select **Add Beneficiary** if you did not add your beneficiary as an existing contact. Select **Add Trust** if you need to add your trust.



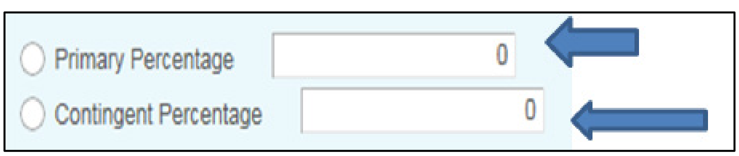
Based on your election, complete the requested information.

Fields with a red * must be completed.

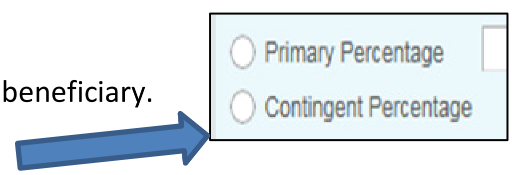
Fields without a red * are optional.



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%.



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



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.