

Creating New or Changing Existing Beneficiaries in Workday

Contents

Create New Beneficiary and Add to Your Beneficiary Allocations Per Benefit Plan 3-4

Create New Trust Profile and Add to Your Beneficiary Allocations Per Benefit Plan 5-6

Add Existing Beneficiaries to Your Beneficiary Allocations Per Benefit Plan 7

Add Existing Trust Profile to Your Beneficiary Allocations Per Benefit Plan 8

Create New Beneficiary and Add to Your Beneficiary Allocations Per Benefit Plan (Basic Life & ADD and if enrolled in Additional Life & ADD for Employee)

Create Beneficiary Profile

To create a new beneficiary profile and add them as a primary beneficiary, you will start by selecting the plus sign under the Primary Beneficiaries section.

*Primary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Once the plus sign has been selected, a drop-down box will appear under the Beneficiary Section. Click the 3 bars  and click on **Add New Beneficiary or Trust**.

*Primary Beneficiaries 1 item

	Beneficiary
	<div><input type="text" value="Search"/></div> <div><div>Existing Beneficiary Persons</div><div>Existing Trusts</div><div>Add New Beneficiary or Trust</div></div>

Secondary Beneficiaries

	Beneficiary
---	-------------

The Add New Beneficiary or Trust screen will appear. Select **Add New Beneficiary** and click on **Continue**.

Fill out the following information – **Relationship** (select 3 bars and choose from drop down box), **Date of Birth**, **Gender** (select 3 bars and choose from drop down box).

Legal Name

Select . Enter **First Name** and **Last Name**.

Create New Beneficiary and Add to Your Beneficiary Allocations Per Benefit Plan (Continued)
(Basic Life & ADD and if enrolled in Additional Life & ADD for Employee)

Contact Information

Select [dropdown]. Add **Phone Number** with Area Code, Select **Phone Device** and **Type** (select 3 bars and choose from drop down box). Scroll down the page and add **Address** and **Usage** (select 3 bars and choose from drop down box).

National IDs

Scroll up the page and Select [dropdown]. This is where you will enter their Social Security Number. Note, while this is not required it is preferred in case you do not update your beneficiary contact information and the beneficiaries need to be contacted if a death occurs. The life insurance vendor can locate the beneficiaries if there is a social security number on file.

Click on the plus sign.

National IDs 0 items

		*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date
No Data						

Under **Country**, select the 3 bars and click on Frequently Used and select United States of America. If not residing in USA, select By Country Alphabetically.

Under **National ID Type**, select the 3 bars and click on Social Security Number.

Under **Add/Edit ID**, enter 9 digit Social Security Number.

Click the **OK** button.

Under the beneficiary just entered, enter the Percentage allocated for this beneficiary. Continue this process until the percentage equals 100% for all beneficiaries elected. You will need to elect at least one Primary Beneficiary at 100% under each plan.

If you want to add Secondary Beneficiaries, you will follow the same steps shown above for this section. Note, the secondary beneficiar(ies) will be considered if the primary beneficiar(ies) elected are deceased at the time the death claim is submitted.

Once completed, click the **Save** button.

Create New Trust Profile and Add to Your Beneficiary Allocations Per Benefit Plan (Basic Life & ADD and if enrolled in Additional Life & ADD for Employee)

Create Trust Profile

To create a Trust profile as a primary beneficiary you will start by selecting the plus sign under the Primary Beneficiaries section.

*Primary Beneficiaries 0 items



+	Beneficiary	Percentage
No Data		

Once the plus sign has been selected a drop-down box will appear under the Beneficiary Section. Click the 3 bars  and click on **Add New Beneficiary or Trust**.

*Primary Beneficiaries 1 item

+	Beneficiary
-	<div>Search </div>
◀	Existing Beneficiary Persons >
Secondary B	Existing Trusts >
+	Add New Beneficiary or Trust

The Add New Beneficiary or Trust screen will appear. Select **Add New Trust** and click on **Continue**.

Fill out the following information – Trust Name, under Trustee Contact Information add **First and Last Name**. If you have contact Phone and/or Address of Trustee then this can be provided (it is not required).

Once completed, click the **OK** button.

Create New Trust Profile and Add to Your Beneficiary Allocations Per Benefit Plan (Continued)
(Basic Life & ADD and if enrolled in Additional Life & ADD for Employee)

Under the beneficiary just entered, enter the Percentage allocated for this beneficiary. Continue this process until the percentage equals 100% for all beneficiaries elected. You will need to elect at least one Primary Beneficiary at 100% under each plan.

If you want to add Secondary Beneficiaries, you will follow the same steps shown above for this section. Note, the secondary beneficiar(ies) will be considered if the primary beneficiar(ies) elected are deceased at the time the death claim is submitted.

Once completed, click the **Save** button.

Add Existing Beneficiaries to Your Beneficiary Allocations Per Benefit Plan (Basic Life & ADD and if enrolled in Additional Life & ADD for Employee)

Existing Beneficiary Profile

To add an existing beneficiary profile as a primary beneficiary you will start by selecting the plus sign under the Primary Beneficiaries section.

*Primary Beneficiaries 0 items



	Beneficiary	Percentage
No Data		

Once the plus sign has been selected a drop-down box will appear under the Beneficiary Section. Click the 3 bars and click on **Existing Beneficiary Persons**.

*Primary Beneficiaries 1 item

	Beneficiary
	<div><div>Search </div><div>Existing Beneficiary Persons ></div><div>Existing Trusts ></div><div>Add New Beneficiary or Trust</div></div>

Secondary B

	Beneficiary
--	-------------

Select an Existing Beneficiary Person from the list. Enter the Percentage allocated for this beneficiary. Continue this process until the percentage equals 100% for all beneficiaries elected.

You will need to elect at least one Primary Beneficiary at 100% under each plan.

If you want to add Secondary Beneficiaries, you will follow the same steps shown above for this section. Note, the secondary beneficiary(ies) will be considered if the primary beneficiary(ies) elected are deceased at the time the death claim is submitted.

When you are done, click the **Save** button.

Add Existing Trust Profile to Your Beneficiary Allocations Per Benefit Plan (Basic Life & ADD and if enrolled in Additional Life & ADD for Employee)

Existing Trust Profile

To add an existing Trust profile as a primary beneficiary you will start by selecting the plus sign under the Primary Beneficiaries section.

*Primary Beneficiaries 0 items



	Beneficiary	Percentage
No Data		

Once the plus sign has been selected a drop-down box will appear under the Beneficiary Section. Click the 3 bars  and click on **Existing Trusts**.

*Primary Beneficiaries 1 item

	Beneficiary
	<div><div>Search </div><div>Existing Beneficiary Persons ></div><div>Existing Trusts ></div><div>Add New Beneficiary or Trust</div></div>

Secondary B

	Beneficiary
--	-------------

Select the Existing Trust from the list. Enter the Percentage allocated for this beneficiary. Continue this process until the percentage equals 100% for all beneficiaries elected. You will need to elect at least one Primary Beneficiary at 100% under each plan.

If you want to add Secondary Beneficiaries, you will follow the same steps shown above for this section. Note, the secondary beneficiary(ies) will be considered if the primary beneficiary(ies) elected are deceased at the time the death claim is submitted.

When you are done, click the **Save** button.