

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.

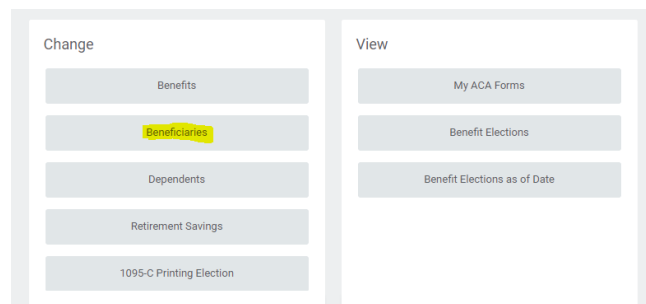
NOTE: Beneficiary information for Lynn’s 403b retirement plan is maintained by TIAA. To change/update your beneficiary information for your retirement plan, you need to contact TIAA either online or by phone.

1. Log into Workday
2. Click on the Benefits icon on your home page



To Create a Beneficiary

1. From the Benefits screen, click on Beneficiaries – If you have already set up your beneficiaries go to Adding or Changing Your Beneficiary below



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

Add My Beneficiary

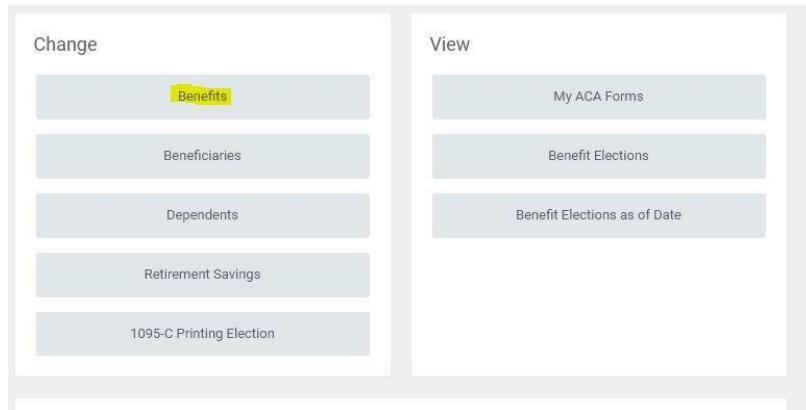
- Create a New Beneficiary
- Create a New Trust as Beneficiary

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. From the Benefits screen, click on Benefits



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)

Change Reason * Beneficiary Change

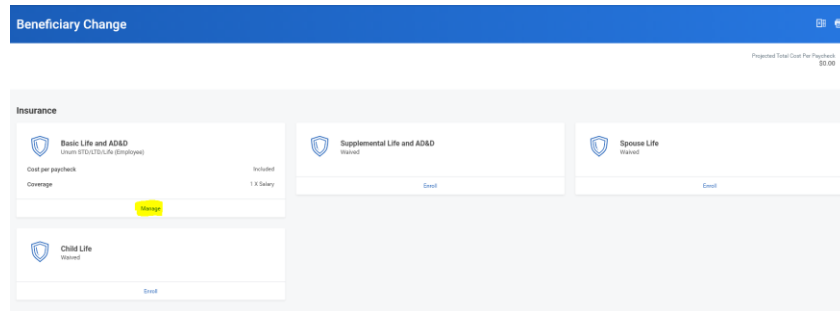
- Birth/Adoption of a Child
- Death of Spouse/Child
- Divorce
- Employee or Dependent Gains/Loses Other Coverage
- Marital Status - Marriage
- Retirement Contribution Change
- Spouse Gains / Loses Coverage from Another Source

Benefit Event Date * MM/DD/YYYY

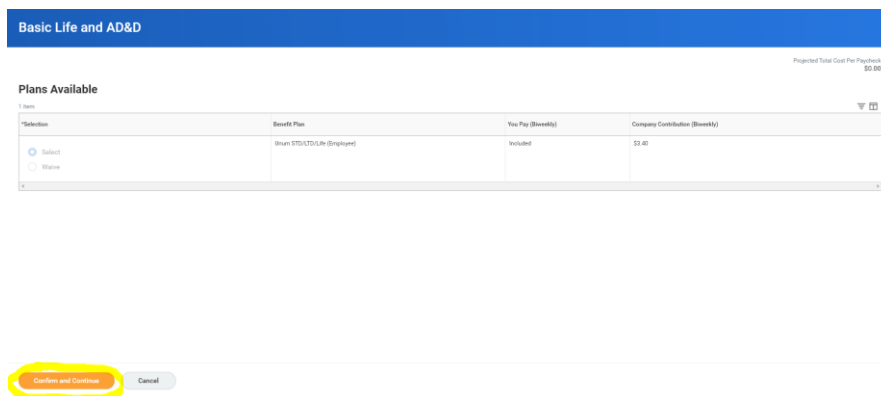
3. Click Submit.

Attachments

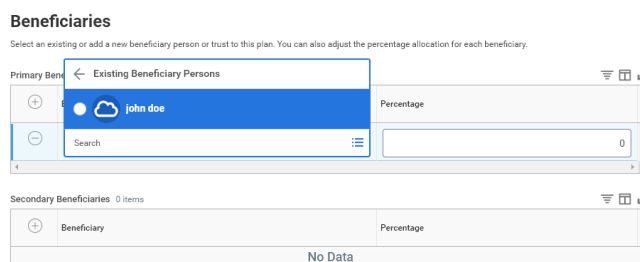
- An OPEN button will appear on the next screen – Click it.
- A LET’S GET STARTED button will appear on the next screen – Click it.
- The Beneficiary Change screen lists Insurance benefits for which beneficiaries can be assigned. Any item that has a “Manage” button under it is a benefit that you personally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



- 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



- 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.



- 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 type="text" value="x Bob Smith"/>	<input type="text" value="50"/>
-	<input type="text" value="x Susan Smith"/>	<input type="text" value="50"/>


Secondary Beneficiaries 1 item

	Beneficiary	Percentage
+		
-	<input type="text"/>	<input type="text" value="0"/>

- When you have finished adding beneficiaries, click Save.


- 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](#)

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
- have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spo

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.