

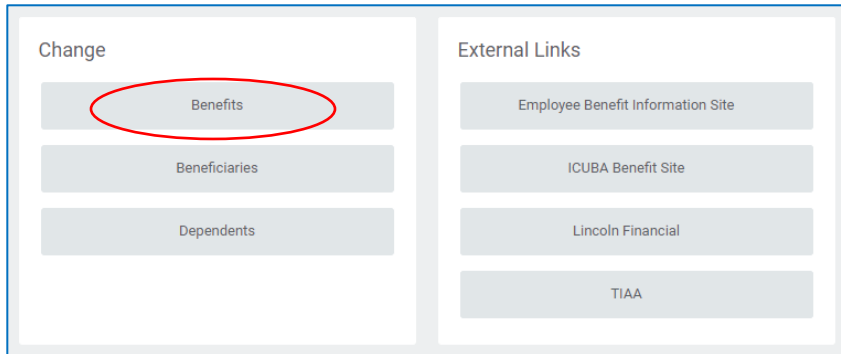
Benefits – Add and Edit Beneficiary Information

Overview

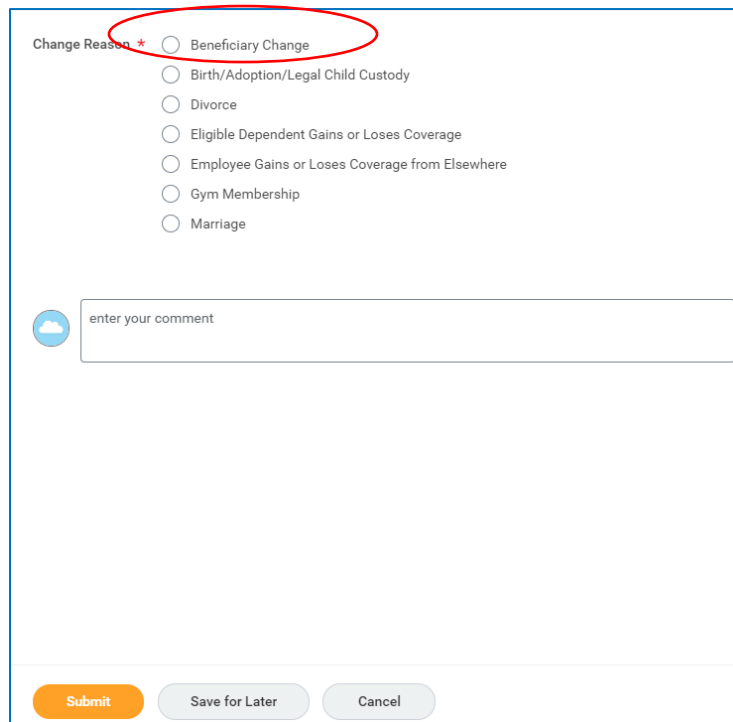
Beneficiaries were not loaded to Workday; each employee must add their own beneficiaries to each Life and AD&D benefit. This is a quick process; the job aid is only long because of all the screenshots.

To add a **New** Beneficiary

1. Select the **Benefit** Application from Home Page
2. To add a **new** Beneficiary, you must select the **Benefits** option, once you have a beneficiary in the system you can edit them by selecting the **Beneficiaries** option. Edit directions are at the end of this document.



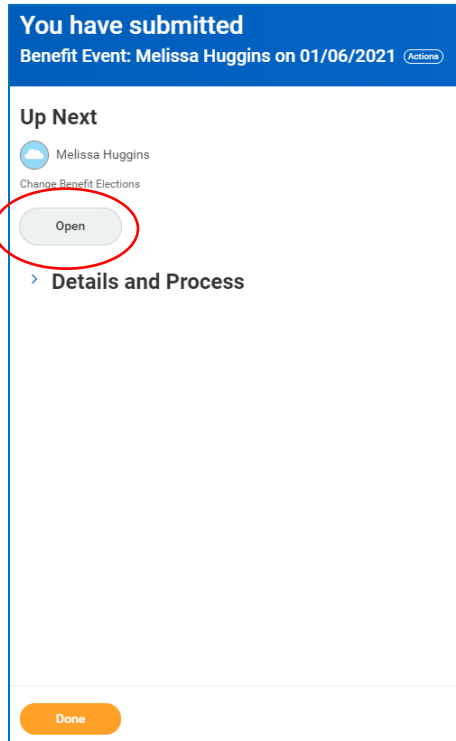
3. Once you have clicked on Benefits, the following screen will appear. To add a new beneficiary, click on **Beneficiary Change**, then your Benefit Event Date is Today's date. You do **not** need to upload any attachments to add a beneficiary. Click submit



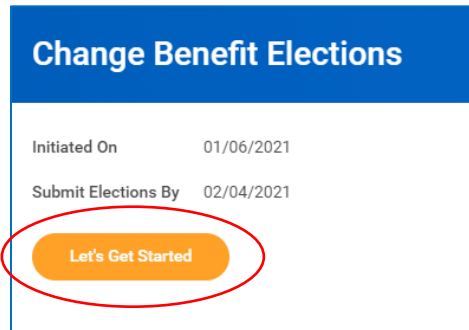
The screenshot shows a form titled 'Change Reason *'. It has a list of radio buttons: 'Beneficiary Change', 'Birth/Adoption/Legal Child Custody', 'Divorce', 'Eligible Dependent Gains or Losses Coverage', 'Employee Gains or Losses Coverage from Elsewhere', 'Gym Membership', and 'Marriage'. The 'Beneficiary Change' radio button is circled in red. Below the list is a text input field with a cloud icon and the placeholder text 'enter your comment'. At the bottom of the form are three buttons: 'Submit' (orange), 'Save for Later' (grey), and 'Cancel' (grey).

4. The following "Up Next" screen will appear, you can click on **Open** to start the process now or you can click **Done** and it'll be sent to your Inbox and you can work on it later.

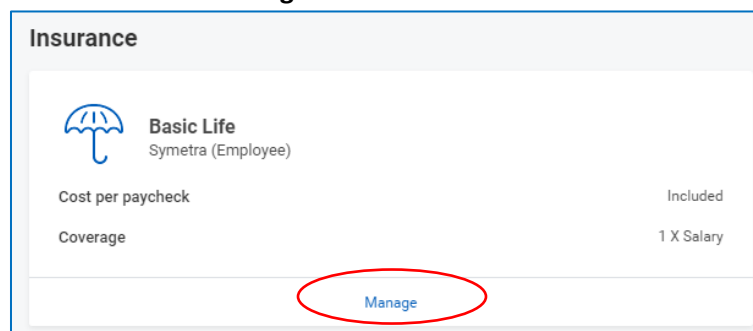
Florida Tech Workday Job Aid



- Once you open the event you'll click on "Let's Get Started"



- The Insurance screen will appear, and you'll see the Basic Life, Basic AD&D, and (if you have them) Voluntary Life, and Voluntary AD&D. You'll click on **Manage** at the bottom of each benefit.



- The plan will show up grayed out, you'll click on the "**Confirm and Continue**" orange box at the bottom.

Florida Tech Workday Job Aid

Basic Life

Plans Available

1 item

*Selection	Benefit Plan	You Pay (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Symetra (Employee)	Included

Confirm and Continue Cancel

8. This will take you to the following screen where you will add your beneficiaries by clicking on the “+” button.

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 0 items

Beneficiary	Percentage
No Data	

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

Save Cancel

9. Click on **Add New Beneficiary or Trust** as this will be the first time you are adding someone, once you add their information you can then add them to other benefits by using the Add Existing Beneficiary option.

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 0 items

- Existing Beneficiary Persons >
- Existing Trusts >
- Add New Beneficiary or Trust**
- Search

Beneficiary	Percentage
	0

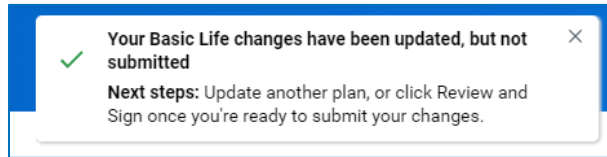
10. The required fields are **Relationship, Country, First Name, Last Name**. You must also click on **Contact Information** and provide an **address**. The more information you provide the easier it is to locate the person in the event of your death.

11. Once you have saved their information, you'll see them show up on the Beneficiary line. You'll need to add a percentage to that person. You can have 100% going to one person or you can add more beneficiaries by clicking on the "+" and going through the process again. The total percentages must equal 100%.
12. Secondary Beneficiaries are not required but you can add them if you like. These are people who would get the benefit if your Primary Beneficiaries are no longer alive.

*Primary Beneficiaries 1 item	
Beneficiary	Percentage
Test Test Spouse	100

Secondary Beneficiaries 0 items	
Beneficiary	Percentage
No Data	

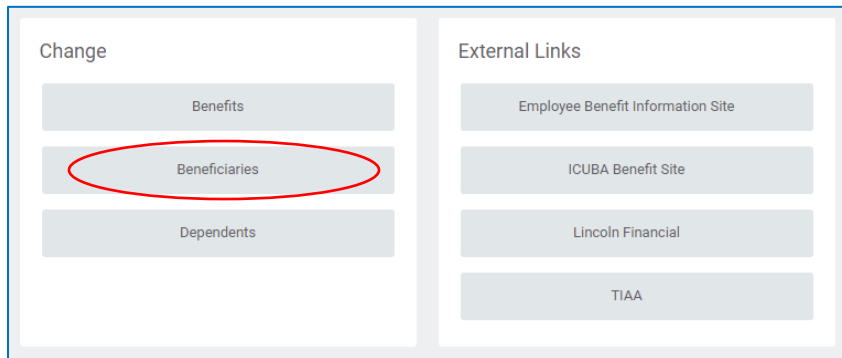
13. Once you click **Save**, your changes have now been updated but not submitted. You'll need to go into the remaining Life and AD&D and add beneficiaries to those benefits as well. You will not have to add the person's information again as they will come up as options under Existing Beneficiary.



- Once you have added beneficiaries to each of the benefits click on **Review and Sign** at the bottom of the screen.
- The View Summary page will appear, and it'll show all your beneficiaries listed for each of the benefits. You'll scroll down to the bottom and check the **"I Accept"** box and then **Submit**. No attachments are needed for beneficiaries.
- The Submitted screen will appear, and you can print a copy for your records or just click **Done**. This completes the process.

To Edit a Beneficiary

- Select the **Benefit** Application from Home Page
- To edit an existing Beneficiary, click on the **Beneficiaries** option in the Change box.



- The Beneficiaries screen will appear with a list of your beneficiaries. Click on the **Edit** to the right of their name.

Beneficiary	Relationship	Benefit Elections	
Test Grandpa	Grandparent		Edit Delete
Test Test Spouse	Spouse	Basic AD&D - Symetra (Employee): 100% Primary Basic Life - Symetra (Employee): 100% Primary Voluntary AD&D - Symetra (Employee): 100% Primary Voluntary Life - Symetra (Employee): 100% Primary	Edit

- The following screen will appear, and you'll click on the **pencil icon** to edit each field.

Beneficiary Personal Information

Legal Name

Legal Name * ✎

Test Test Spouse

Relationship

Relationship * ✎

Spouse

Date of Birth

Date of Birth ✎

- Once you are done making changes to all the fields you can click **Submit** and **Done**, the process is complete.