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 **Benefits** 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.

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.
5. Once you open the event you’ll click on “Let’s Get Started”

6. 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.

7. The plan will show up grayed out, you’ll click on the “Confirm and Continue” orange box at the bottom.
8. This will take you to the following screen where you will add your beneficiaries by clicking on the “+” button.

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.
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.

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.
14. Once you have added beneficiaries to each of the benefits click on Review and Sign at the bottom of the screen.
15. 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.
16. 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

1. Select the Benefit Application from Home Page
2. To edit an existing Beneficiary, click on the Beneficiaries option in the Change box.
3. The Beneficiaries screen will appear with a list of your beneficiaries. Click on the Edit to the right of their name.
4. The following screen will appear, and you’ll click on the pencil icon to edit each field.
5. Once you are done making changes to all the fields you can click Submit and Done, the process is complete.