



Assigning Benefit Beneficiaries

This document contains instructions in the following areas for assigning benefit beneficiaries:

- Overview
- Triggering the Beneficiary Change Notification
- Assigning Your Beneficiary(ies)



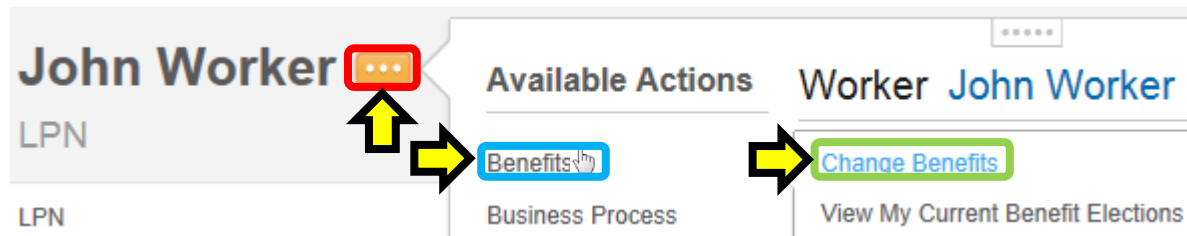
Overview

There may be times when you need to add or adjust the beneficiaries tied to your benefit plans. These instructions detail that process.

Within Workday you can separately maintain your beneficiaries' information (see the Viewing, Changing, Adding, and/or Removing Beneficiaries instructions within the Managing Your Dependents, Emergency Contacts, and Beneficiaries category). These instructions show you how to assign and remove beneficiaries from individual benefit plans that allow beneficiaries to be assigned. You can either use beneficiaries you have already setup or you will have the opportunity to create them "on-the-fly".

The most direct way to get to the screens to reassign your benefit beneficiaries is to use the related actions icon on the Workday Profile Screen.

Workday Profile Screen
 Select the **related actions icon** -> **Benefits** -> **Change Benefits**



Triggering the Beneficiary Change Notification

1. The Change Benefits screen will appear. Select **Beneficiary Change** in the Benefit Event Type section. Enter an effective date in the **Benefit Event Date** field. If desired enter a comment in the comments section and click **Submit**.

Change Benefits John Worker ...

Benefit Event Type *

- Adoption of Child(ren)
- Beneficiary Change**
- Birth of Child(ren)
- Death of Spouse/Dependent
- Divorce
- Eligibility for Other Insurance Coverage
- Loss of Coverage Under Another Health Plan
- Marriage

Benefit Event Date * 08/19/2014

Submit Elections By 09/18/2014

Enrollment Offering Types 403(b)
Basic Life
Voluntary Term Life - EE



Your enrolled benefit plans for which beneficiaries may be attached will be displayed in the *Enrollment Offering Types* section.

Attachments

+	Attachment	Comment	File
No Data			

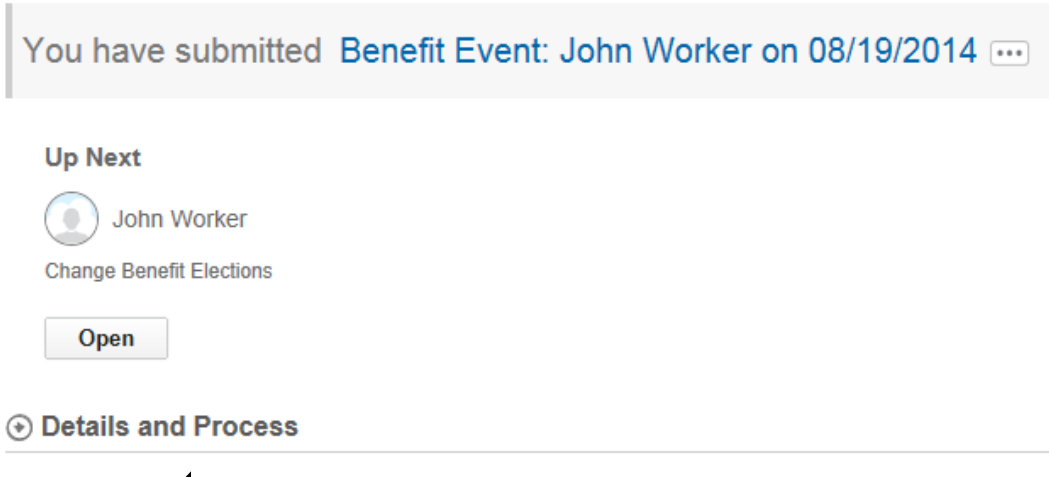
enter your comment

View Comments (0)
Process History
Related Links

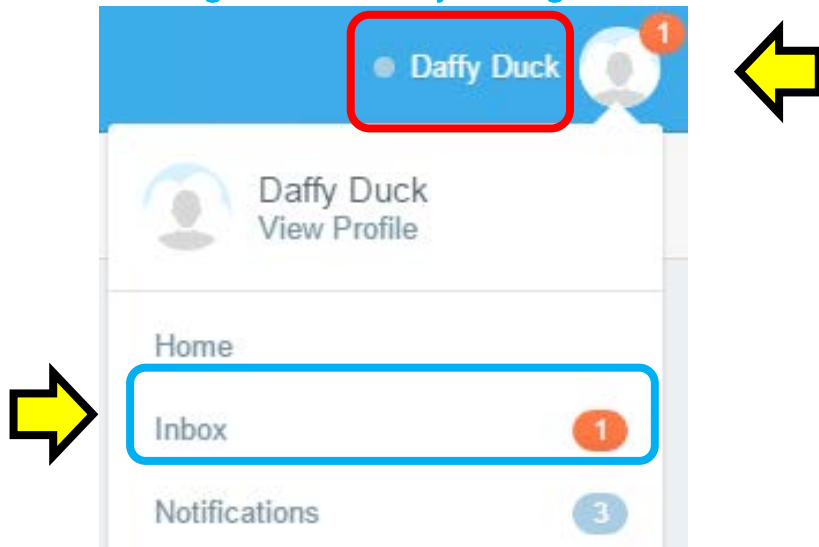
Submit Save for Later Cancel



2. The following screen will appear. Click Done.



3. A few seconds later you will have a notification in your Workday Inbox. Click the **Inbox** icon then click the [Benefit Change – Beneficiary Change](#) item.



4. The Change Benefit Elections screen will appear. In this instance this screen displays the Basic and Voluntary Term Life benefits; there are no items to be changed at this point. Click Continue.

Change Benefit Elections Beneficiary Change for John Worker - Step 1 of 4

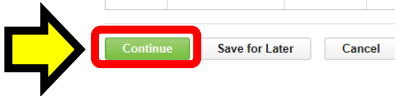
Event Date 08/11/2014
 Initiated On 08/11/2014
 Submit Elections By 09/10/2014

Total Cost **\$1.52 Bi-weekly Cost** Total Credits **\$0.00 Bi-weekly Credit** Total Employee Net Cost/Credit **\$1.52 Bi-weekly Cost**

Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 2 Items

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents	Calculated Coverage	Employee Cost (Bi-weekly)	Employer Contribution (Bi-weekly)	Benefit Credit (Bi-weekly)	Plan Description	Provider Website
Basic Life - UNUM (Employee)	<input type="radio"/> Elect <input type="radio"/> Waive	1 X Salary		\$39,000.00		\$1.62	0.00	Unum Life and AD&D Booklet	UNUM
Voluntary Term Life - EE - UNUM (Employee)	<input type="radio"/> Elect <input type="radio"/> Waive	\$50,000		\$50,000.00	\$1.52		0.00		UNUM
					1.52	1.62	0.00		



5. The next Change Benefit Elections screen will appear. In this instance this screen displays the 403b benefits; there are no items to be changed at this point. Click Continue.

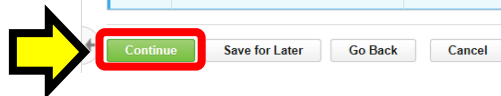
Change Benefit Elections Beneficiary Change for John Worker - Step 2 of 4

Event Date 08/11/2014
 Initiated On 08/11/2014
 Submit Elections By 09/10/2014

Total Cost **\$1.52 Bi-weekly Cost** Total Credits **\$0.00 Bi-weekly Credit** Total Employee Net Cost/Credit **\$1.52 Bi-weekly Cost**

Retirement Savings Elections

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution	Plan Description	Provider Website
403(b) - Mass Mutual with Match	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0 Amount (Bi-weekly) 0.00	Percentage Minimum 1 Percentage Maximum 100 Amount Maximum (Bi-weekly) \$673.08	403b Plan Highlights	Mass Mutual



6. The next Change Benefit Elections screen will appear. Each row represents a benefit plan that you can assign beneficiaries to. If you have already assigned a beneficiary previously that beneficiary will be listed in the Beneficiary column. From this point you can **adjust percentages** and/or use the **plus sign icon (⊕)** to add additional beneficiaries (**you can select existing beneficiaries using the menus or create a new beneficiary by clicking Create** – the instructions for creating a beneficiary can be found within the Managing Your Dependents, Emergency Contacts, and Beneficiaries category). To remove a beneficiary from a benefit plan click the **minus sign (⊖)**. Once you have finished with this screen **Continue**.

Change Benefit Elections Beneficiary Change for John Worker - Step 2 of 4

Event Date 08/11/2014
Initiated On 08/11/2014
Submit Elections By 09/10/2014

Total Cost **\$1.52 Bi-weekly Cost** Total Credits **\$0.00 Bi-weekly Credit** Total Employee Net Cost/Credit **\$1.52 Bi-weekly Cost**

Beneficiary Designations 2 items

Benefit Plan	Provider	Beneficiaries
Voluntary Term Life - EE - UNUM (Employee)	UNUM	
Basic Life - UNUM (Employee)	UNUM	

Beneficiary Designation Details:

*Beneficiary	*Primary Percentage / Contingent Percentage
Anna Worker	<input type="radio"/> Primary Percentage 0 <input type="radio"/> Contingent Percentage 0
Mary Worker	<input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0

Navigation: Continue (highlighted), Save for Later, Go Back, Cancel





7. If there are more benefit plans to work with the next Change Benefit Elections screen will appear. Same general instructions as in the previous page. When finished working with the assigning of benefit beneficiaries review your changes and then click **Submit**. Your notification will be marked as complete in your Workday inbox.

Change Benefit Elections Benefit Elections Review for Beneficiary Change - Step 4 of 4

Worker	John Worker	Total Cost	Total Credits	Total Employee Net Cost/Credit
Event Date	08/11/2014	\$1.52 Bi-weekly Cost	\$0.00 Bi-weekly Credit	\$1.52 Bi-weekly Cost
Initiated On	08/11/2014			
Submit Elections By	09/10/2014			

Elected Coverages 2 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Bi-weekly)	Employer Contribution (Bi-weekly)	Benefit Credit (Bi-weekly)
Basic Life - UNUM (Employee)	08/01/2014	08/01/2014	1 X Salary	\$39,000.00		Mary Worker		\$1.62	
Voluntary Term Life - EE - UNUM (Employee)	08/01/2014	08/01/2014	\$50,000	\$50,000.00		Mary Worker	\$1.52		
							1.52	1.62	0.00

Waived Coverages

Beneficiary Designations

Attachments

Attachment	Comment	File
No Data		

enter your comment

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