



Working with Your Beneficiary Information

This document contains instructions in the following areas for working with your beneficiary information:

- Overview of Beneficiaries
- Viewing Beneficiaries
- Adding Beneficiaries (Person)
- Adding Beneficiaries (Trust)
- Editing Beneficiary Information
- Deleting Beneficiaries



Overview of Beneficiaries

Your beneficiaries are objects within Workday that you are able to maintain on your own without needing to submit any paperwork and without needing to contact Human Resources. Beneficiaries can also be maintained "on-the-fly" when changing benefits. Refer to procedures regarding benefit changes for further instructions.

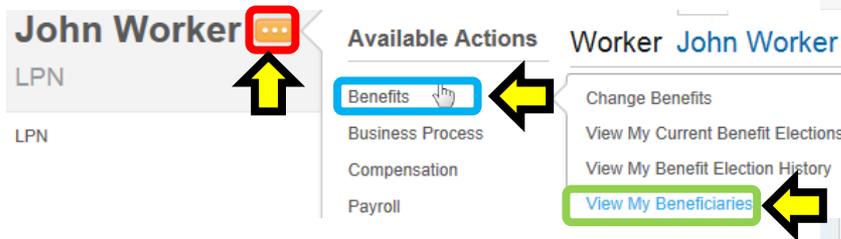
NOTES:

- You will have the option to select an existing emergency contact or dependent as a beneficiary.

There are many means to get to where you can work with your Beneficiaries. Two methods will be shown in these instructions: using the Related Actions off of your Workday Profile screen and using the Workday Landing Page.

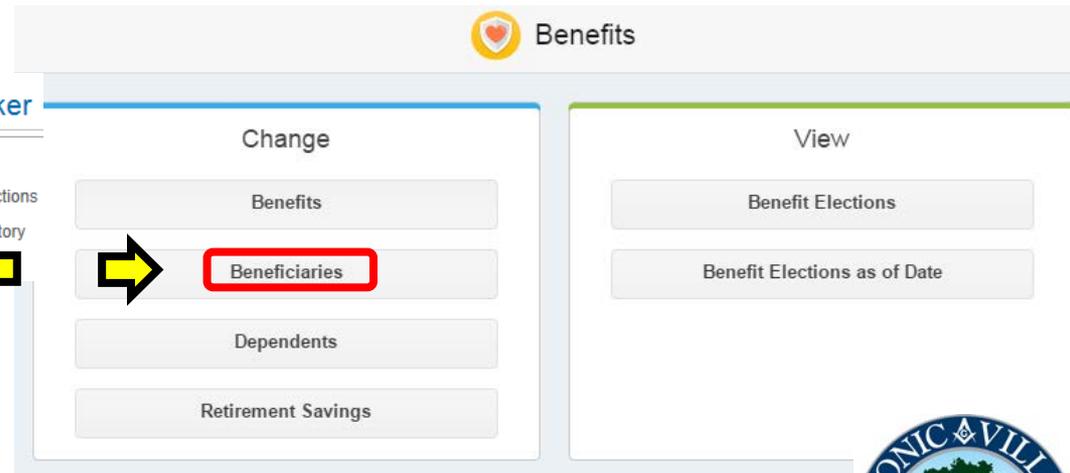
Workday Profile Screen

Select the **related actions icon** -> **Benefits**
-> **View My Beneficiaries**



Workday Landing Page

Click the **Benefits Worklet** -> **Change** -> **Beneficiaries**



Viewing Beneficiaries

1. Your Beneficiaries screen will appear listing any beneficiaries you have setup within the system. Click a **beneficiary name** to see more details about that beneficiary. The next pages in this document will detail how to add, edit, and delete beneficiaries.

Beneficiaries [John Worker](#) ⋮



Add

6 items



Beneficiary	Relationship	Benefit Elections	
Anna Worker	Spouse	Basic AD&D - UNUM (Employee): 100% Primary Voluntary Term Life - EE - UNUM (Employee): 100% Primary	Edit
Jake Worker	Parent		Edit Delete
John Worker Family Trust 2014	Trust		Edit Delete



Adding Beneficiaries (Person)

1. Click Add to start the steps to add a beneficiary.

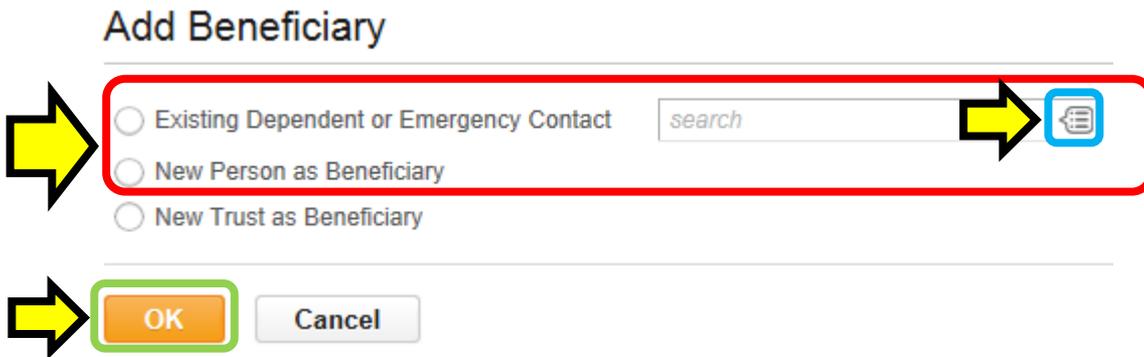


2. The Add Beneficiary screen will appear. Choose an **option for adding a beneficiary**.

NOTE:

- If you choose Existing Dependent or Emergency Contact, you must choose a person already designated as a dependent or as an emergency contact from the list to the right using the **prompt button** (🗒️). *Choosing an existing dependent or emergency contact will populate some of the information needed to set that person as a beneficiary.*

3. Click **OK**.



Adding Beneficiaries (Person)

4. The Add Beneficiary for (your name) will appear. Complete all required and any desired fields within the **top portion of the screen** and then click the **Legal Name tab**. Complete all required and any desired fields. When finished click the **Contact Information tab** to proceed.

Add Beneficiary For John Worker ...

Use this page to add a beneficiary.

Relationship * Child

Use as Beneficiary

Date of Birth 11/09/2006

Age 7 years, 8 months, 26 days

Gender x Male

Full-time Student

Student Status Start Date

Student Status End Date

Disabled

Allow Duplicate Name

Legal Name
Contact Information
National IDs
Additional Government IDs
Other IDs

Country * United States of America

Prefix search

First Name * Michael

Middle Name

Last Name * Worker

Suffix search

OK
Cancel



If you chose to add a beneficiary using an existing dependent or emergency contact some of the information on these steps may already be populated.



Adding Beneficiaries (Person)

5. The Contact Information tab will appear. Each person you designate must have an address associated with him or her. It is also suggested that you include a phone number. Click the **Add buttons** to open up the fields to enter the information (see the Workday Tips section below for tips to make adding addresses and phone numbers easier). When finished, complete any desired fields on the **National IDs, Additional Government IDs, and Other IDs tabs** (none of the fields on these tabs are required to add a beneficiary). Click **OK** when done

6. A confirmation screen will appear. Click **Done**.





Adding Beneficiaries (Trust)

1. Click Add to start the steps to add a beneficiary.

Beneficiaries **John Worker** ...



2. The Add Beneficiary screen will appear. Choose an **New Trust as Beneficiary**. Click **OK**.

Add Beneficiary

Existing Dependent or Emergency Contact



New Person as Beneficiary



New Trust as Beneficiary



Adding Beneficiaries (Trust)

3. The Add Beneficiary screen will appear. Complete the required (marked with a red asterisk) and optional fields. To add more than one trustee name, click **Add Trustee Name** to open up another section to enter another name. When you are finished click **OK** to submit the information.

Add Beneficiary For John Worker ⋮

Use this page to add a trust as a beneficiary.

Trust Name *

Trust ID

Trust Date

Trustee Contact Information

Trustee Name

Add Trustee Name

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix





Adding Beneficiaries (Trust)

4. A confirmation screen will appear. Click **Done**

Add Beneficiary

Trust Creation Successful

For Employee **John Worker**

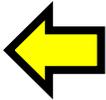
Trust Name **John Worker Trust - Family 2014**

Trust ID **8938947879589**

Last Name **Flintstone**

Suffix **(empty)**

Done



Editing Beneficiary Information

1. On your beneficiaries screen click Edit to the left of the beneficiary you wish to edit.

Beneficiaries **John Worker** ⋮ ✕ 🖨

6 items ✕ 🔍

Beneficiary	Relationship	Benefit Elections	
Anna Worker	Spouse	Basic AD&D - UNUM (Employee): 100% Primary Voluntary Term Life - EE - UNUM (Employee): 100% Primary	<input type="button" value="Edit"/>
Jake Worker	Parent		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
John Worker Family Trust 2014	Trust		<input type="button" value="Edit"/> <input type="button" value="Delete"/>

2. The beneficiary will open up in the Edit Beneficiary screen. Make the necessary changes (making sure all required fields are filled out) and click **OK**.



3. Click Done on the Edit Beneficiary screen.



Deleting Beneficiaries

1. On your beneficiaries screen click Delete to the left of the beneficiary you wish to edit.

NOTE:

- You cannot delete a beneficiary that has benefits listed in the Benefit Elections section. You must assign the beneficiary role to another beneficiary before deleting. See the Benefit Changes documentation category for further instructions.

Beneficiaries John Worker ⋮



Add

6 items



Beneficiary	Relationship	Benefit Elections	
Anna Worker	Spouse	Basic AD&D - UNUM (Employee): 100% Primary Voluntary Term Life - EE - UNUM (Employee): 100% Primary	Edit
Jake Worker	Parent		Edit Delete
John Worker Family Trust 2014	Trust		Edit Delete



2. The Remove Beneficiary Confirmation screen will appear. Click **OK**.

Remove Beneficiary Confirmation John Worker Family Trust 2014

You are about to remove a beneficiary. Click the OK button to remove the beneficiary or the Cancel button to not remove the beneficiary.

