workday

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

Working with Your 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.

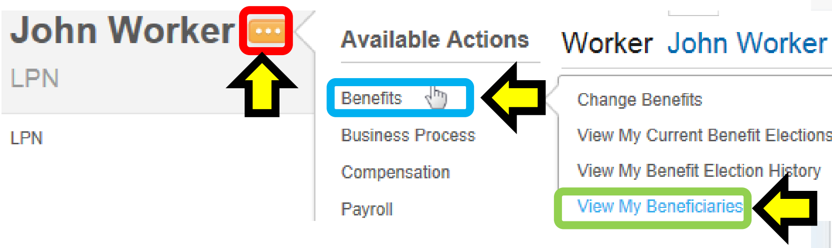
NOTES:

- 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.

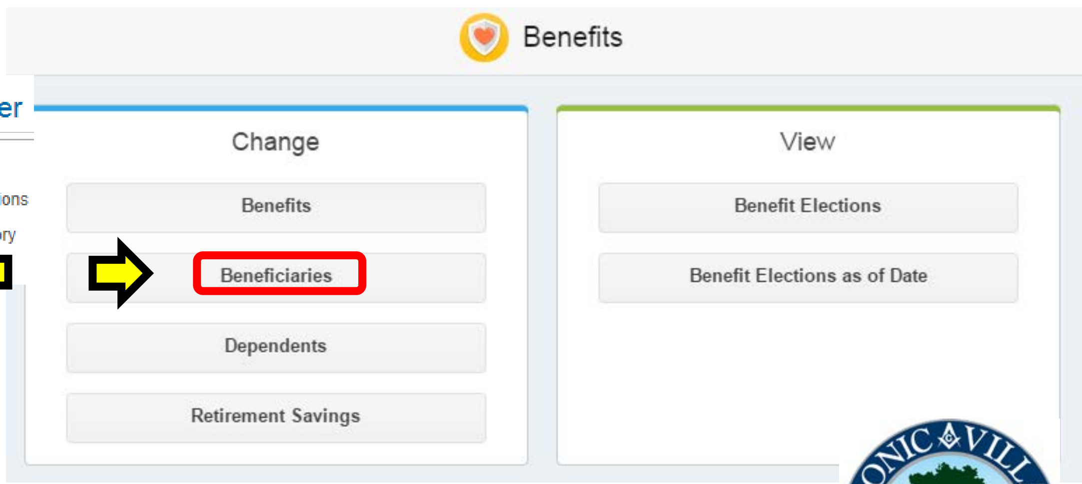
Workday Profile Screen

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



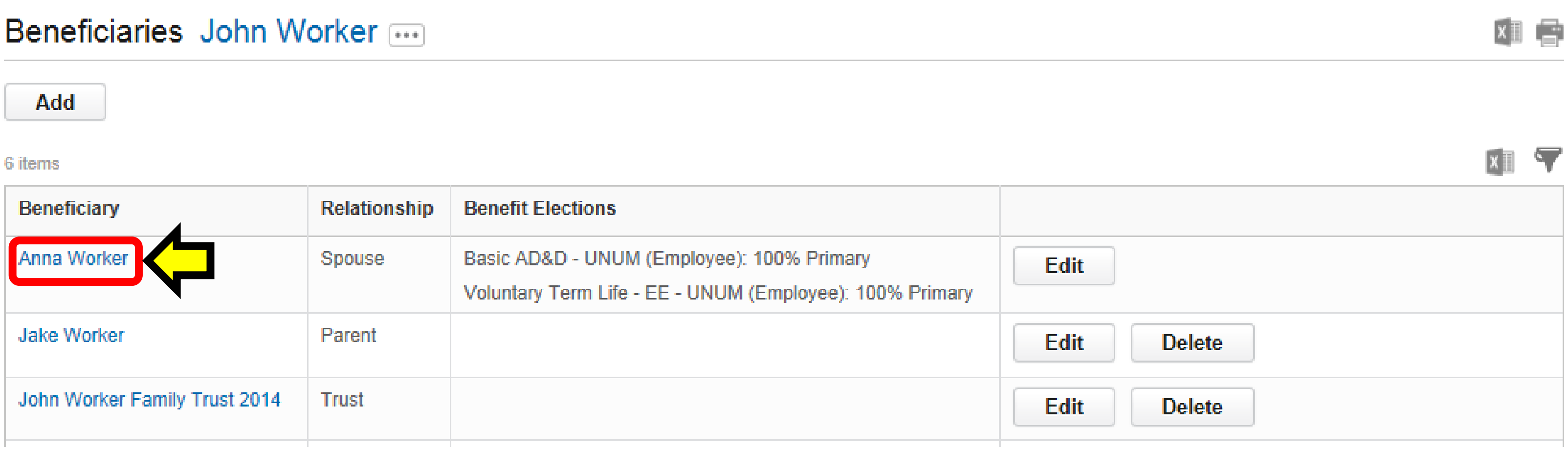
Workday Landing Page

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

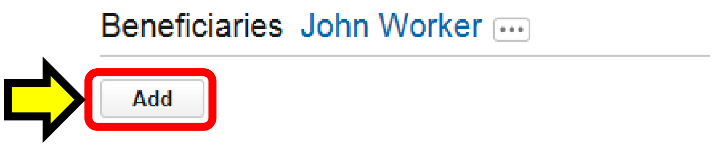
Add

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)

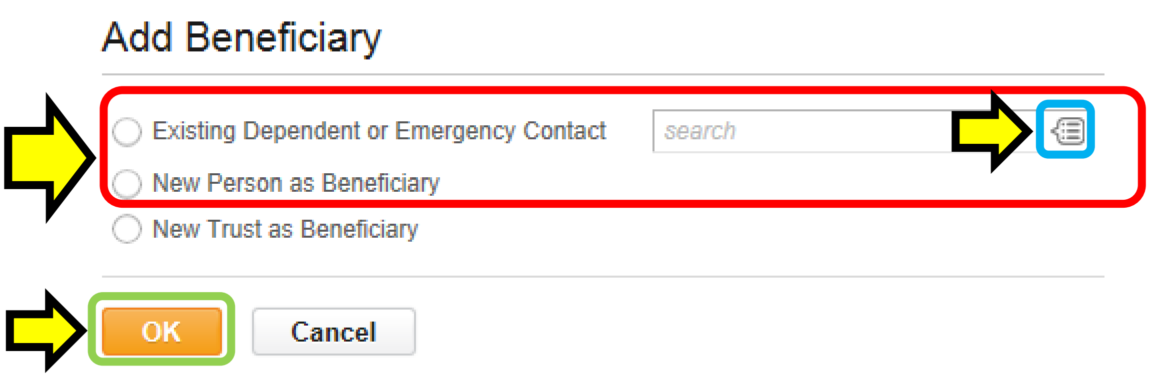
1. Click Add to start the steps to add a beneficiary.



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.*

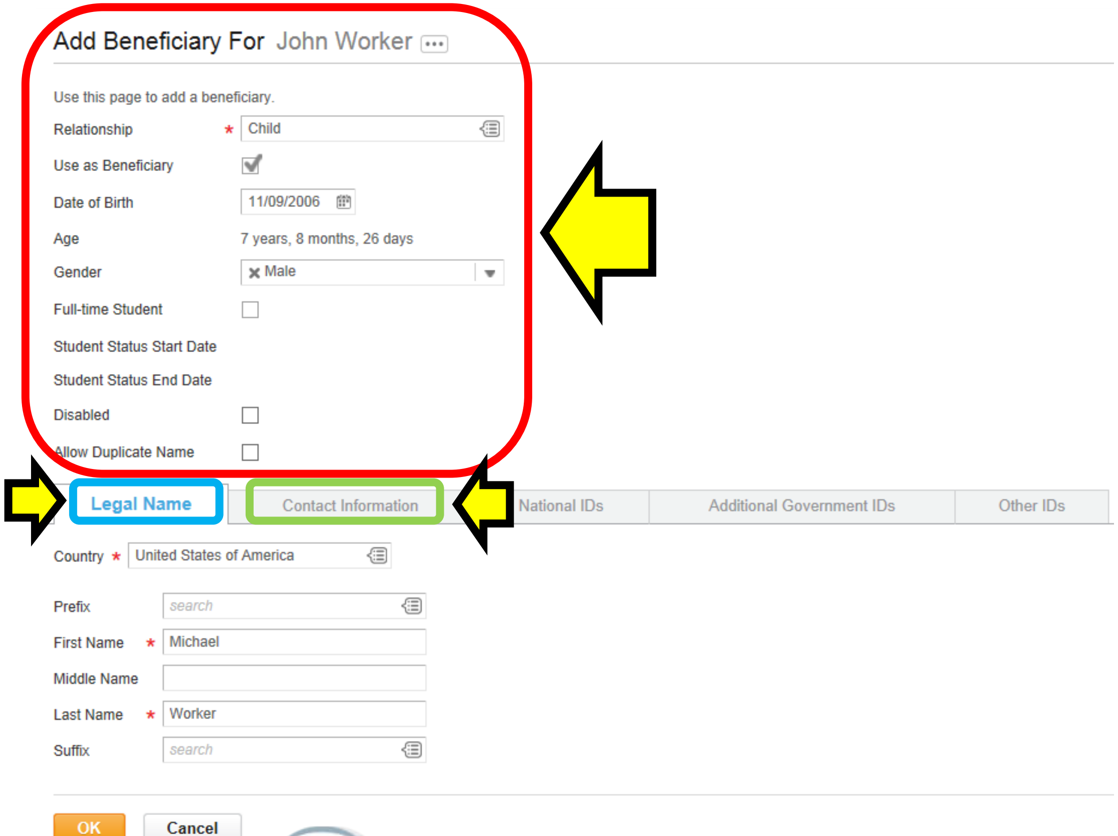
3. Click OK.



Working with Your Beneficiaries

Adding Beneficiaries (Person)

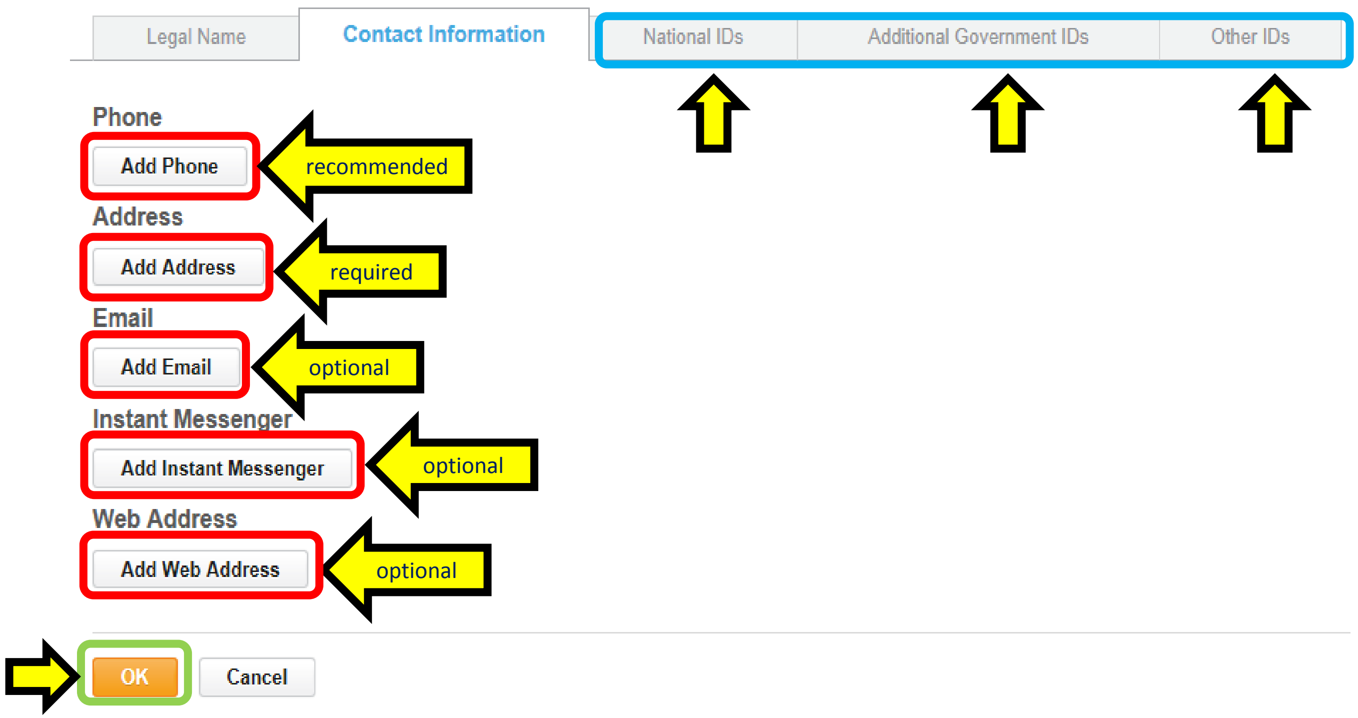
4. The Add Beneficiary for (your name) will appear. Complete all required and any desired fields within the top portion of the screen and then click the Legal Name tab. Complete all required and any desired fields. When finished click the Contact Information tab to proceed.



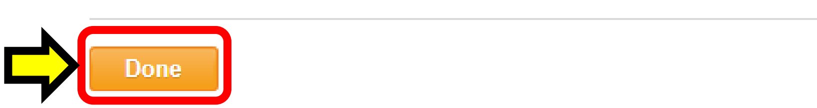
If you chose to add a beneficiary using an existing dependent or emergency contact some of the information on these steps may already be populated.

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

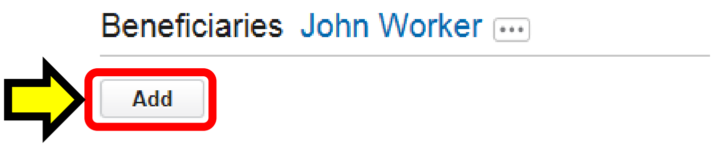


6. A confirmation screen will appear. Click Done.

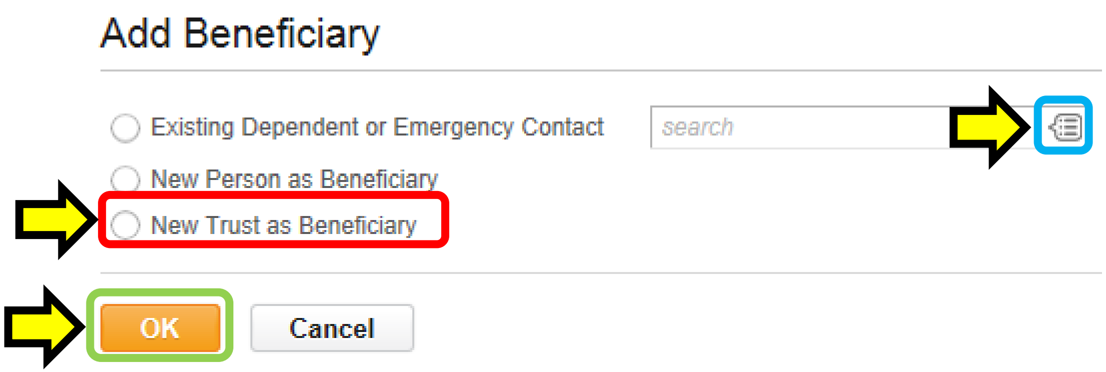


Adding Beneficiaries (Trust)

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

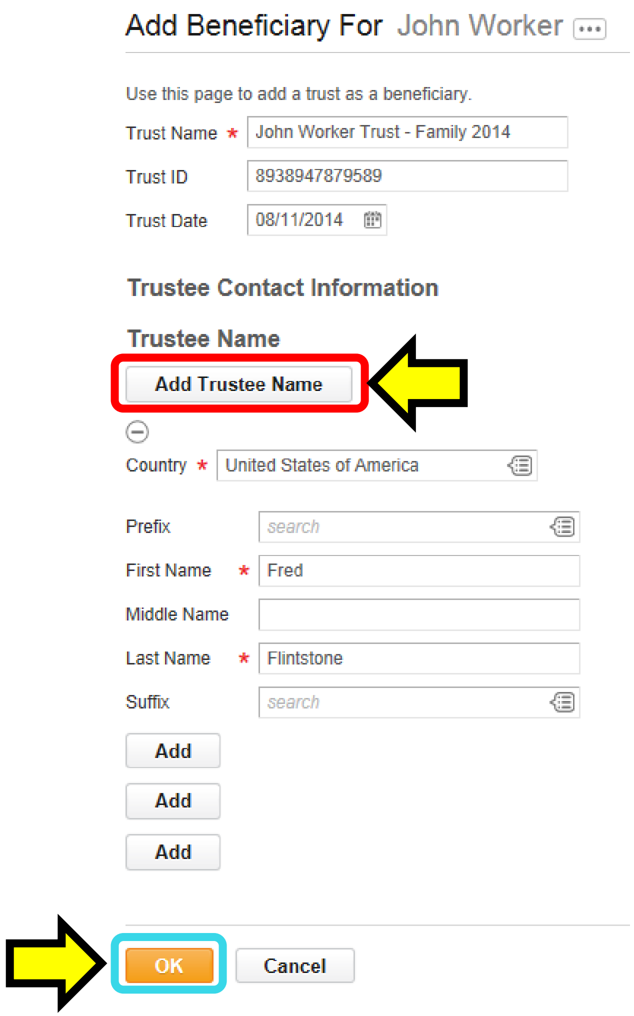


2. The Add Beneficiary screen will appear. Choose an New Trust as Beneficiary. Click OK.



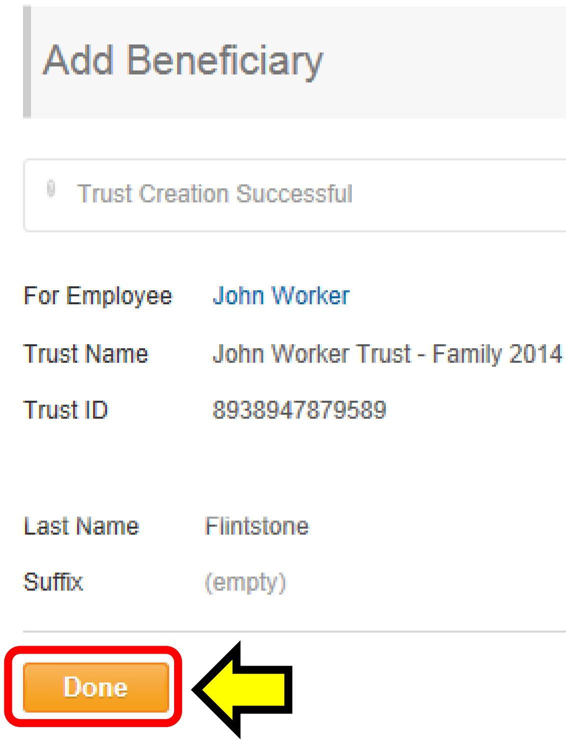
Adding Beneficiaries (Trust)

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.



Adding Beneficiaries (Trust)

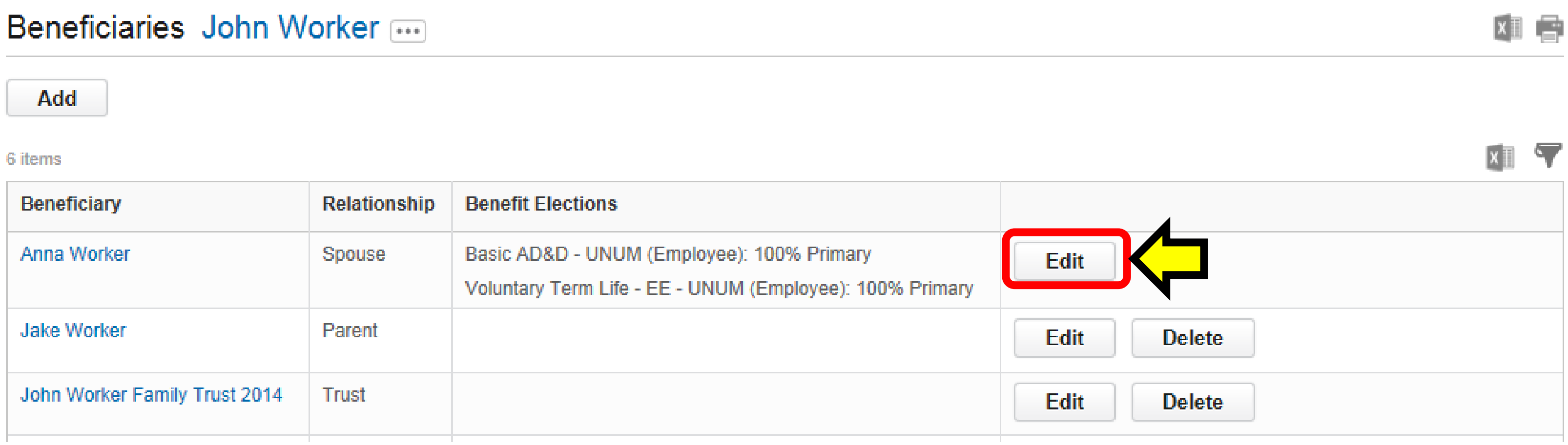
4. A confirmation screen will appear. Click Done



Working with Your Beneficiaries

Editing Beneficiary Information

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



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 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.

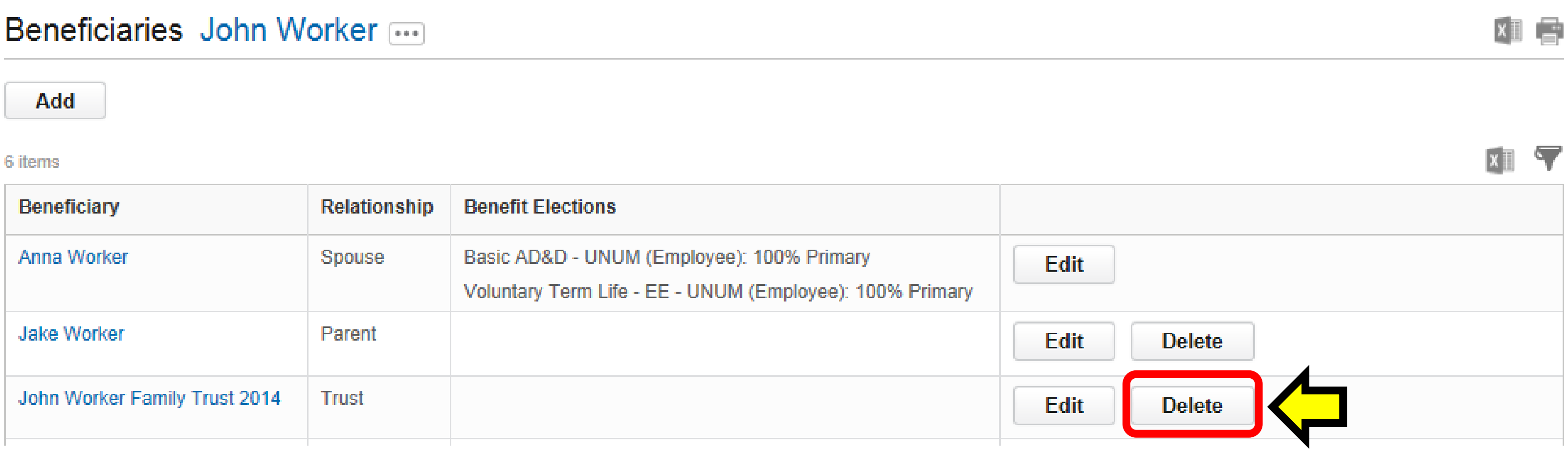
Working with Your Beneficiaries

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 Benefit Confirmation screen will appear. Click OK.