

The ‘Change Beneficiary’ process in Workday allows Team Members to update the beneficiaries designated for their benefits. This reference guide will cover the steps for adding, editing, and removing beneficiary information.

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Add Beneficiary

This section covers adding a beneficiary.

1. In the search bar at the top center of your homepage, type 'Change Benefits' and select the **Change Benefits** task when suggested.
2. Within the *Change Benefits* template, select **Change Beneficiaries** (A) as the *Change Reason*. Select today's date (the date you are submitting the request) within the *Please select today's date* (B) then select **Submit** (C).

A search bar with a magnifying glass icon on the left and a close icon on the right. Below the search bar, a dropdown menu is open, showing a single result: 'Change Benefits Task' with a document icon to its left. The entire dropdown menu is highlighted with a red rectangular box.

The 'Change Benefits' form for user 'Destiny Nguyen'. It includes a 'Change Reason' section with radio button options: 'Birth / Adoption of Child', 'Change Beneficiaries' (selected and marked with a red circle 'A'), 'Change Dependent Care FSA', 'Change HSA Contribution', 'Domestic Partnership', 'Employee or Dependent Gains Other Coverage', 'Loses Coverage from Another Source', 'Marriage', and 'Spouse/Dependent Loses Coverage'. Below this is a date field 'Please select today's date:' with the date '06/02/2025' and a calendar icon, marked with a red circle 'B'. Further down, it shows 'Submit Elections By' as '06/02/2025' and 'Benefits Offered' as 'Basic Life' and 'Supplemental Life'. At the bottom, there are three buttons: 'Submit' (marked with a red circle 'C'), 'Save for Later', and 'Cancel'.

3. Confirmation will populate, select **Open**.

A confirmation screen titled 'You have submitted'. Below the title, it says 'Up Next: Destiny Nguyen | Change Benefit Elections' and provides a link 'View Details'. At the bottom, there is a blue button labeled 'Open' which is highlighted with a red rectangular box.

4. Within the *Change Benefits Elections* screen, select **Let's Get Started**.

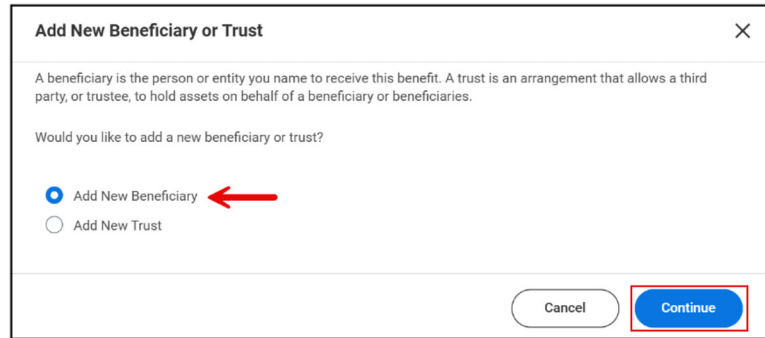
The 'Change Benefit Elections' screen. It contains 'SAMPLE INSTRUCTIONS' and a 'Let's Get Started' button at the bottom, which is highlighted with a red rectangular box. The screen also displays 'Initiated On' and 'Submit Elections By' dates as '06/02/2025'.

- In the *Change Beneficiaries* screen, the plans you are enrolled in will display. Select **Manage** on the plans to add your beneficiary to.

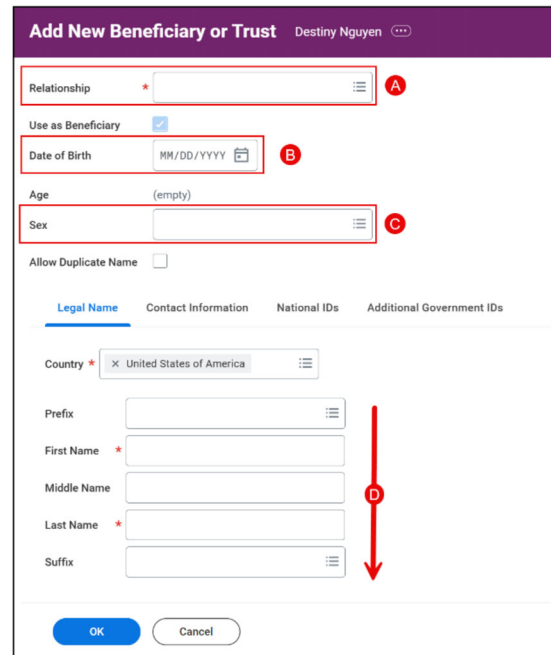
- Within the plan screen, select **Confirm and Continue**.

- In the *Beneficiaries* section, select the **Add (+)** (A) icon to add a beneficiary. Select **Add New Beneficiary or Trust** (B).
- Note:** If a beneficiary has already been added select **Existing Beneficiary Persons** to select the beneficiary from the drop-down menu.

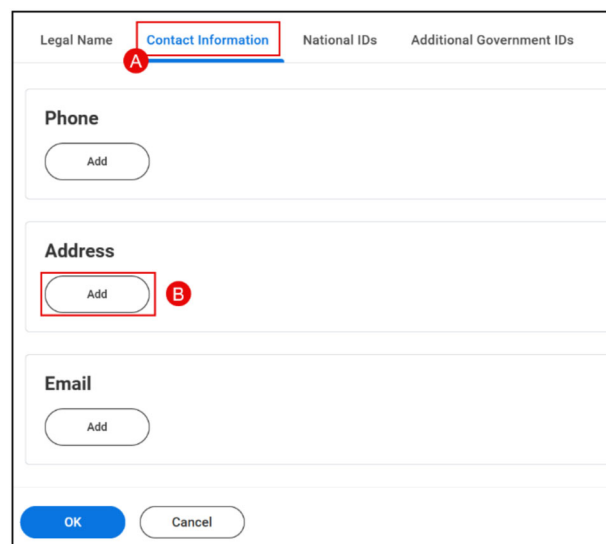
- In the *Add New Beneficiary or Trust* select **Add New Beneficiary** and select **Continue**.



- In the *Add New Beneficiary or Trust* window, select the **Relationship** (A), **Date of Birth** (B), and **Sex** (C) of your beneficiary.
- Scroll down to the *Legal Name* tab and complete the required fields (D).



- Select the **Contact Information** (A) and select **Add** (B) in the *Address* field.



12. Complete the required fields (A) then select **OK** (B).

13. Once the beneficiary/beneficiaries have been added, type in the **Percentage**. Make sure the total is equal to '100.' For an example, if you have one beneficiary listed the percentage should be '100,' but if you have three beneficiaries their totals should equal '100' (ex. 30, 30, and 40).

14. Select **Save**.

15. In the *Change Beneficiaries* window, select **Review and Sign**.

16. In the *View Summary* window, check the **I Agree** box then select **Submit**.

View Summary

Projected Total Cost (Biweekly)
\$0.00

Review your elections below for accuracy and scroll to review any messages and errors as well as the Total Benefits Cost. Some of your supplemental benefits such as VOYA will not show on your benefit statement, but will show on your pay slip. You will need to complete your beneficiary enrollments before submitting your changes.

Selected Benefits 1 item

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Basic Life	06/02/2025	06/02/2025	\$50,000		Apollo Creed	Included

• Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you have had a qualified change in status event during the calendar year.
• If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance coverage, you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment within 31 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse and your dependents, provided you request enrollment within 31 days after the marriage, birth or adoption.

I Accept ☐ →

Submit (highlighted) Save for Later Cancel

17. Confirmation will populate, select **Done**.

Submitted

You've submitted your elections.

Legal Notice: Please Read

Your name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I Agree" checkbox, you are certifying that:

[View 2025 Benefits Statement](#)

Done (highlighted)

Edit/Remove Beneficiary

This section covers adding a beneficiary.

- Repeat steps 1-6.
- Within the benefit plan selected, there will be a *Primary Beneficiary* and *Secondary Beneficiary* section. To remove a beneficiary, select the **Minus (-)** icon (A).
- If updating the **Percentage** assigned to the beneficiary, type in the update percentage (B).
- Once changes have been made, select **Save** (C).

Basic Life - Excess Risk 50,000 (Employee Only)

Projected Total Cost (Biweekly)
\$0.00

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 1 item

Beneficiary	Percentage
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> - (A) </div> <div style="border: 1px solid gray; padding: 2px;"> × Apollo Creed ... </div> </div>	<div style="border: 1px solid red; padding: 2px;">100</div> (B)

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

Save (C) Cancel

5. Within the *Change Beneficiaries* window, select **Review and Sign**.

6. In the *View Summary* window, check the **I Agree** box then select **Submit**.

7. Confirmation will populate, select **Done**.