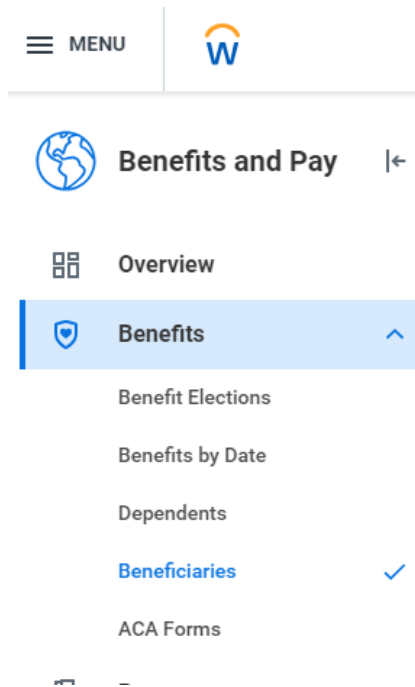


Workday Instructions: Add and designate beneficiaries

This is a two-step process. The first step involves creating your list of available beneficiaries. The second step is to assign or designate the person.

Step 1 - TO ADD Beneficiary(s)

1. Click the Menu in the upper left corner of your Workday page
2. Click the Benefits and Pay application
3. Click the dropdown arrow next to the Benefits and then click Beneficiaries



3. Click on Add

- If you have already entered the individual's information as an emergency contact or a dependent in Workday, you can add them as a beneficiary by choosing the first option on the new screen, otherwise click on Create a New Beneficiary for adding a new individual or Create a New Trust as Beneficiary if you have a Trust set up then click OK:

Add My Beneficiary

- Existing Dependent or Emergency Contact
- Create a New Beneficiary
- Create a New Trust as Beneficiary

Workday Instructions: Add and designate beneficiaries

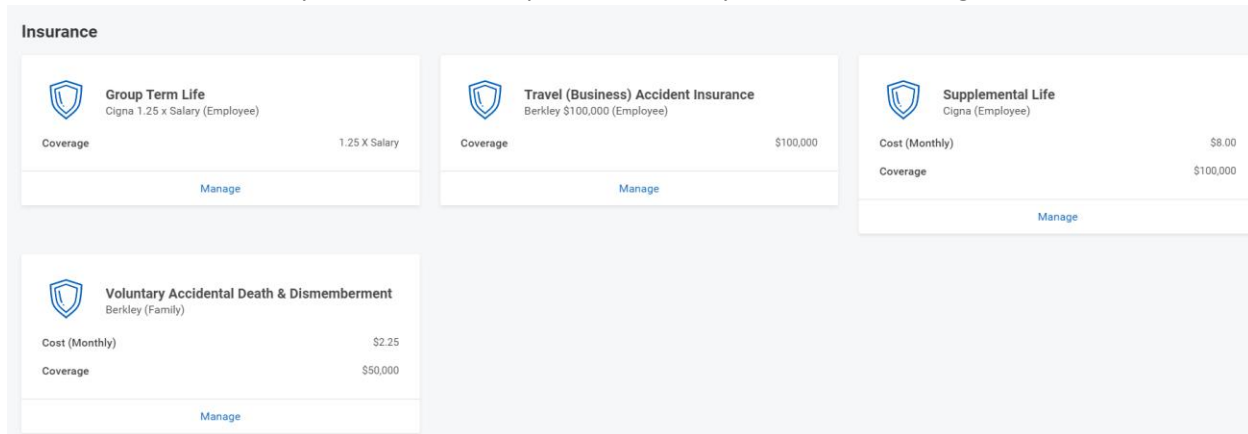
4. On the Add My Beneficiary screen, enter your beneficiary’s information. Be sure to complete all fields with a red star (*). The Contact Information section requires an address. Repeat for each beneficiary. Click Submit once finished. Once completed, you have created your list of available beneficiaries. Now you are ready to assign or designate your beneficiary(ies).

Step 2: Assigning your beneficiaries.

- Click the Menu in the upper left corner of your Workday page
- Click the Benefits and Pay application
- Click the Change Benefits button
- Change Reason- Beneficiary Change
- Benefit Event Date- The date you are completing the event
- Click Submit and then Open
- Click Let’s Get Started:

Let's Get Started

1. Under the life insurance you would like to update beneficiary(ies) on click Manage:



Insurance	
<p>Group Term Life Cigna 1.25 X Salary (Employee)</p> <p>Coverage: 1.25 X Salary</p> <p>Manage</p>	<p>Travel (Business) Accident Insurance Berkley \$100,000 (Employee)</p> <p>Coverage: \$100,000</p> <p>Manage</p>
<p>Voluntary Accidental Death & Dismemberment Berkley (Family)</p> <p>Cost (Monthly): \$2.25</p> <p>Coverage: \$50,000</p> <p>Manage</p>	<p>Supplemental Life Cigna (Employee)</p> <p>Cost (Monthly): \$8.00</p> <p>Coverage: \$100,000</p> <p>Manage</p>

2. Review your life insurance and then click Confirm and Continue on the bottom of the page

Confirm and Continue

Cancel

3. Select an existing or add a new beneficiary person (or trust) to the life insurance you elected.
- Click on the + sign to create/open a line. You will need to click on the + sign to create/open a line for each primary and contingent beneficiary.

Workday Instructions: Add and designate beneficiaries

- Click on the search prompt to select someone from your previously created list (beneficiary persons).
- You can add an existing beneficiary or trust or create a new beneficiary or trust:

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 0 items

+	Beneficiary	Percentage
No Data		

Secondary Beneficiaries 0 items

+	Beneficiary	Percentage
No Data		

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

+	Beneficiary	Percentage
-	Existing Beneficiary Persons	
	Existing Trusts	
	Add New Beneficiary or Trust	
	Search	
		0

- Once you have designated the beneficiary/trust, you will need to assign a percentage of the life insurance. The primary beneficiaries must be equal to 100% as well as any contingent beneficiaries. Click Save once you are done
- Repeat for each life insurance you would like to make a change to beneficiary to
- Once you have finished, you can click on Review and Sign:

Review and Sign Save for Later

- After reviewing your changes, scroll to the bottom of the page and click the I Agree button to agree with the Legal Notice and then click Submit:

I Accept

Submit Save for Later Cancel