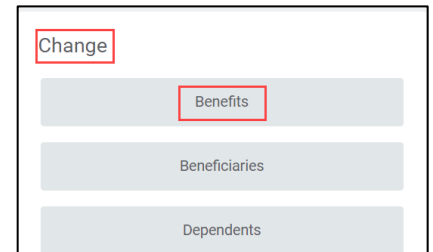# ADD/CHANGE BENEFICARY INFORMATION

Follow the steps below to update or add beneficiary information in Workday.

1. Select **Benefits** app from your Home Landing page

2. Select **Benefits** from Change menu

3. Complete the following required fields:
   - **Change Reason**-select **Change Beneficiary at any time**
   - **Today's Date**- Use today's date or any date in the future that the change should take effect

4. Select **Submit**

5. Select **Open** from confirmation screen to begin, the **Change Benefits Election** screen will appear showing your current life insurance coverage
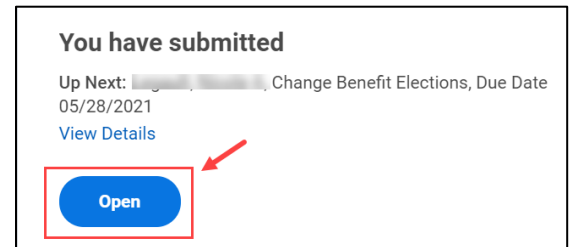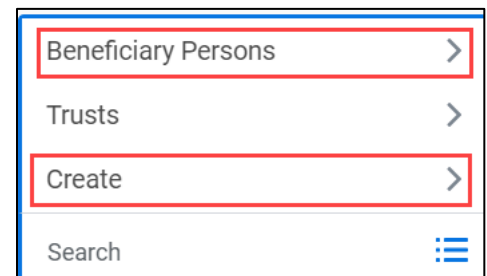

6. Select **Continue** to access the **Beneficiary** screen to:
   - **Add**, **Change** or **Update** your Beneficiaries
   - Update current Beneficiary **Primary** and **Contingent Percentage Allocations**

Add Beneficiary

- Select the plus sign under Beneficiary
- **Have Beneficiary in Workday**:
  - Select prompt under **Beneficiary** column
  - Select **Beneficiary Persons**>choose beneficiary from listing
- **Need to create a new Beneficiary**:
  - Select prompt under **Beneficiary** column
  - Select **Create**>**Add Beneficiary**
  - Complete the required fields (* indicates required)
  - Select **Contact Information Tab**
  - Select **Add**-complete **Address** and **Address Type** fields
 - Select **OK** to save the information-the new Beneficiary should now appear in your list of **Beneficiary Designations**

- o Repeat steps above to add another Beneficiary
- o Allocate **Primary**and **Contingent Percentages**-Each allocation must equal 100%

Remove Existing Beneficiary

- Select minus sign next to existing Beneficiary
- Beneficiary will be removed from your list
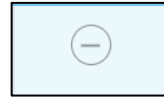
7. Select **Continue**-a review page will open, confirm Beneficiary information
   - Scroll down to **I Agree**, check the box
   - Select **Submit**-Confirmation page will open>view your allocations at bottom
   - Select **Print** and follow prompts to obtain paper copy