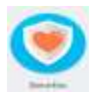
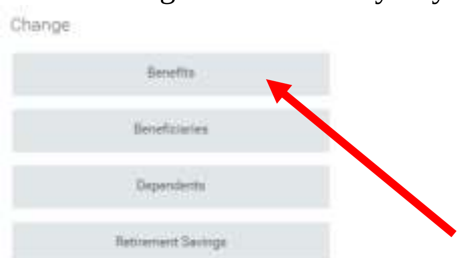
INSTRUCTIONS:
ADDING/CHANGING A BENEFIACIARY TO LIFE INSURANCE

A change/update to your beneficiary can be made at anytime. Adds/changes to your beneficiary go into effect immediately.

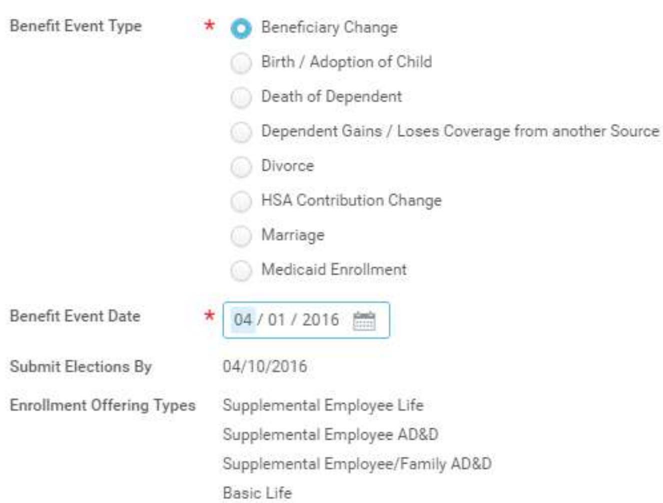
<u>Before you begin, please have the following handy in order to complete the enrollment:</u>
- Employee ID and WorkDay Password
- Beneficiary Information

<u>How to Add or Change a Beneficiary to Life Insurance:</u>

- Login to WorkDay with your Employee ID and Password
- Click on the Benefit icon 
- Under 'Change', select Benefits
  - Selecting Beneficiaries, will only allow you to add beneficiary's information, but does not assign the beneficiary to your life insurance plan(s)



- Select Beneficiary Change as your 'Benefit Event Type' and enter Today's Date as your 'Benefit Effective Date'



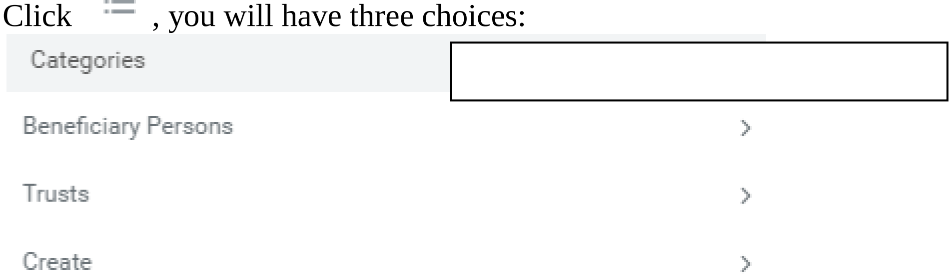
- Enter 'Benefit Event Date' (Today's date)
- Click Submit

- WD will take you to a screen that says “Success! Event Submitted”. Click ‘Open’

<u>You will have 3 steps to complete:</u>

- **Step 1:** Shows you your elections (you cannot make changes to your elections, they will be grayed out). Click Continue at the bottom on the screen.
- **Step 2:** This is where you will add/change your beneficiary. If you have more than 1 life insurance election (basic life, supplemental life, voluntary AD&D), you will need to make elections for each of them.
  - Click the + sign, to add a beneficiary. To Change your beneficiary, you will click the – sign, and then the + sign to add the new beneficiary.

  - Click , you will have three choices:



    - Select Beneficiary Persons if you previously created the intended beneficiary. You will see a list of created beneficiaries
    - Select Create if you have not created a beneficiary. You will have the option to add beneficiary, add beneficiary using existing contact (dependents), or add trust
  - Once you have selected your beneficiary or beneficiaries, select primary percentage and contingent percentage and enter the percent amount. *Note: The added percentages must equal 100* *A contingent beneficiary is someone who will receive the benefit in the event your Primary beneficiary or beneficiaries are no longer living. You are not required to have a contingent beneficiary.*
  - Click Continue

- **Step 3:** Review your changes, click the ‘I agree’ box, and submit your changes.