

ADDING A BENEFICIARY TO WORKDAY

There are two ways to add a beneficiary. One is to create the beneficiary prior to connecting them/it to the benefit, the other is to go into the benefit and then create the beneficiary.

CREATING THE BENEFICIARY FIRST

1. In Workday
2. Select – Benefits
3. Under ‘Change’, select Beneficiaries
4. Click – Add
5. Select appropriate option – ‘New Person as Beneficiary’ – click Ok
6. Select a Relationship – be sure to scroll through to view all options
7. Enter a Date of Birth and a Gender
8. Enter the beneficiary’s name in the First, Middle and Last Name fields (first and last name fields are mandatory)
9. Select the Contact Information tab to add an Address/Phone Number, if you are using your home address for your beneficiary, click on the Blue Notepad to the right of Use Existing Address option or add the address by completing the required field (indicated by a *) (Address is mandatory)
10. You must select a ‘Type’ (home or work) for your address (you may need scroll down to see this under ‘Usage’)
11. Click ‘OK’
12. You should see ‘You have successfully completed this task’. Review this information for accuracy.
13. Click Done – this will bring you back to the Beneficiary page. You should see the beneficiary you just created.
14. If you need to add additional beneficiaries, click Add Beneficiary (step 4 above) and repeat steps five through 11.
15. If you are done, go back to the home page and follow steps below to attach your new beneficiary to a benefit.

ATTACH YOUR NEW BENEFICIARY OR CHANGE YOUR CURRENT BENEFICIARY DESIGNATION TO YOUR BENEFITS

1. Select – Benefits
2. Under ‘Change’, select Benefits
3. Select – ‘Change Beneficiary’
4. Enter a Benefit Event Date (today’s date is fine) – hit Submit
5. You should now see Up Next Steps with OPEN below it – click on this box
6. You should now see a list of all of your Insurance Plans with coverage information. Click Continue to begin attaching your beneficiaries to your benefits
7. You should see each life insurance option you have in-force, at this point, you can now add beneficiaries for each benefit by following the steps below.
8. Click on the plus sign (+) under the Beneficiary column (this will give you a blank box with a Blue Notepad)
9. Click on the Notepad, this will now bring up a second box (if you added beneficiaries earlier you should select ‘Beneficiary Persons’ and those names should now appear in a pop-up box, if you did not create or designate any beneficiaries, instructions on creating/designating them are above)
10. Select the beneficiary you created by clicking on the name – this will move them into the blank box
11. Choose either ‘Primary Beneficiary’ or ‘Contingent Beneficiary’
12. Enter the percentage you want this beneficiary to receive (must total 100%)
13. Once you’ve finished entering a beneficiary for each benefit Click Continue to move to Step 3 (reviewing your beneficiary elections). If you are not satisfied with your elections, hit ‘Go Back’ to make changes, otherwise, use the scroll bar on the right to move to the bottom of the page.
14. Read the Electronic Signature section – click on ‘I Agree’ and hit SUBMIT.
15. You have successfully completed the beneficiary election/change process and now have an opportunity to print your benefit elections (including beneficiary information).
16. Click Print, this will create an automatic download of your confirmation to your computer.
17. To locate the download, select the Library icon (where you find your folders) and click on Downloads.

18. You should see a new item – ‘Submit_Elections_Confirmation’. This is the copy of your current benefit elections and beneficiary designations.

CREATING A BENEFICIARY UNDER A BENEFIT IF YOU HAVE DEPENDENTS OR BENEFICIARIES ON WORKDAY

1. Follow steps 1 to 9 under Attach a New Beneficiary to your Benefit, but here you need to select ‘Create’ to locate persons added to your record but not identified as a beneficiary
2. Select – Add Beneficiary Using Existing Contact
3. You should see Beneficiary Using Existing Contact and below that a search box with a NotePad – click the NotePad to bring up your existing contacts
4. Select the contact you want to designate as a beneficiary, click OK.
5. You should now be at Step 9 of the Creating a Beneficiary process and your selected beneficiary information should appear. If all information is correct, click Ok.
6. You should now be at step 6 of the Attach a New Beneficiary to your Benefits page. Follow the remaining steps in the section to complete your beneficiary designation.

Any questions or issues – send an inquiry to – askbenefits@msci.com.