

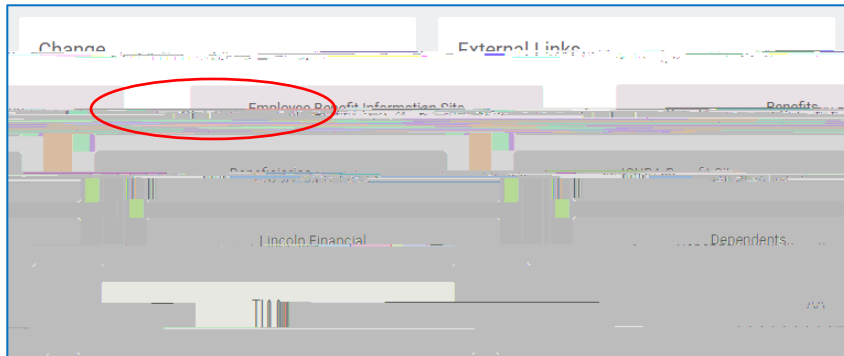
## Benefits Add and Edit Beneficiary Information

### Overview

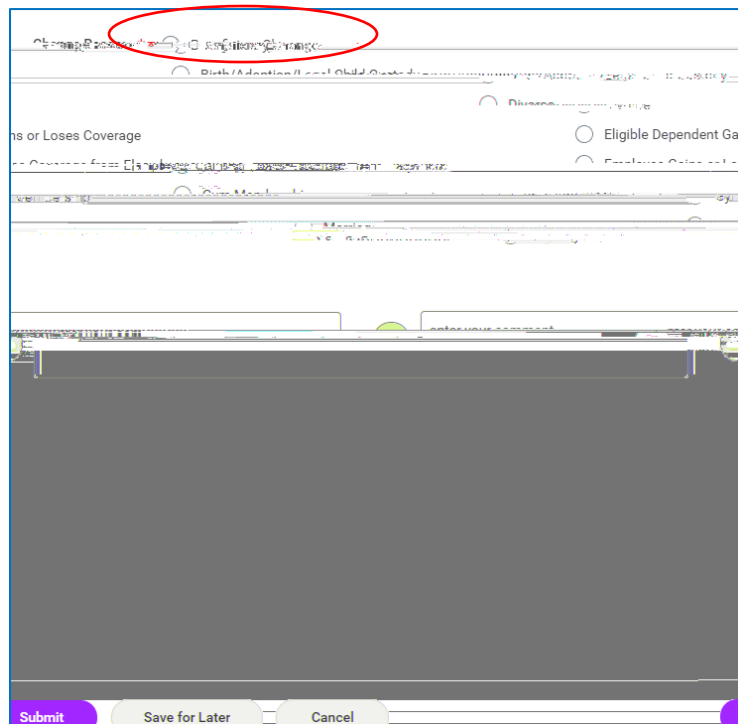
Beneficiaries were not loaded to Workday; each employee must add their own beneficiaries to each Life and AD&D benefit. This is a quick process; the job aid is only long because of all the screenshots.

### To add a New Beneficiary

1. Select the  Application from Home Page
2. To add a new Beneficiary, you must select the  option, once you have a beneficiary in the system you can edit them by selecting the  option. Edit directions are at the end of this document.



3. Once you have clicked on Benefits, the following screen will appear. To add a new beneficiary, click on  then your Benefit Event Date is Today's date. You do not need to upload any attachments to add a beneficiary. Click submit

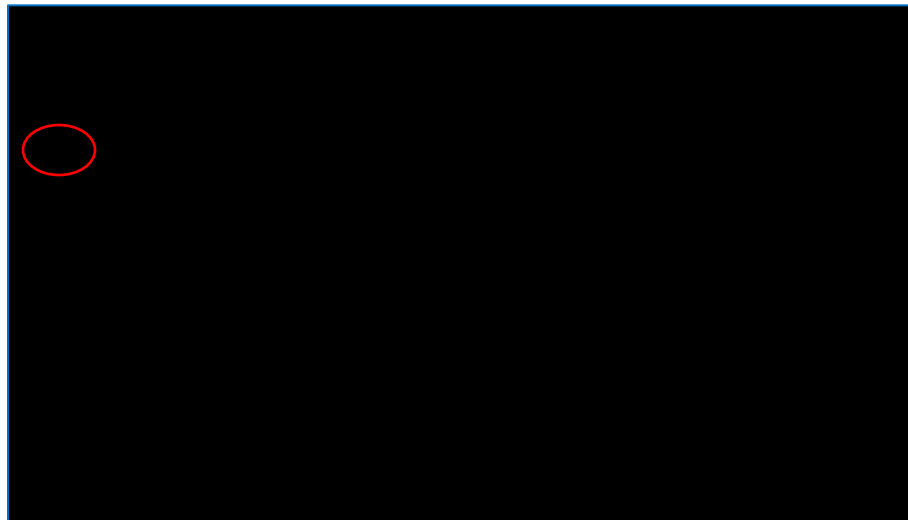


4. The following "Up Next" screen will appear, you can click on  to start the process now or you can click  and it'll be sent to your Inbox and you can work on it later.

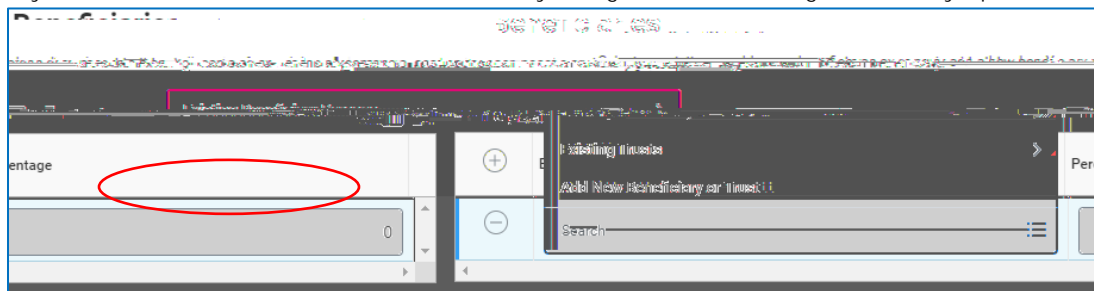




8. This will take you to the following screen where you will add your beneficiaries by clicking on the " " button.



9. Click on [redacted] as this will be the first time you are adding someone, once you add their information you can then add them to other benefits by using the Add Existing Beneficiary option.



10. The required fields are \_\_\_\_\_ . You must also click on \_\_\_\_\_ and provide an \_\_\_\_\_ . The more information you provide the easier it is to locate the person in the event of your death.

11. Once you have saved their information, you'll see them show up on the Beneficiary line. You'll need to add a percentage to that person. You can have 100% going to one person or you can add more beneficiaries by clicking on the " " and going through the process again. The total percentages must equal 100%.
12. Secondary Beneficiaries are not required but you can add them if you like. These are people who would get the benefit if your Primary Beneficiaries are no longer alive.

13. Once you click \_\_\_\_\_ , your changes have now been updated but not submitted. You'll need to go into the

14. Once you have added beneficiaries to each of the benefits click on \_\_\_\_\_ at the bottom of the screen.
15. The View Summary page will appear, and it'll show all your beneficiaries listed for each of the benefits. You'll scroll down to the bottom and check the " \_\_\_\_\_ " box and then \_\_\_\_\_. No attachments are needed for beneficiaries.
16. The Submitted screen will appear, and you can print a copy for your records or just click \_\_\_\_\_. This completes the process.

### To Edit a Beneficiary

1. Select the click