Welcome to Workday Self Service. Within Workday, you can manage your beneficiaries by adding, editing, and changing beneficiary allocation and information. This guide covers general information on how to add beneficiary information. If you have any questions please contact your Benefits Team.

Note: You will need social security numbers, date of birth, and addresses to make add or make modifications to your beneficiaries.

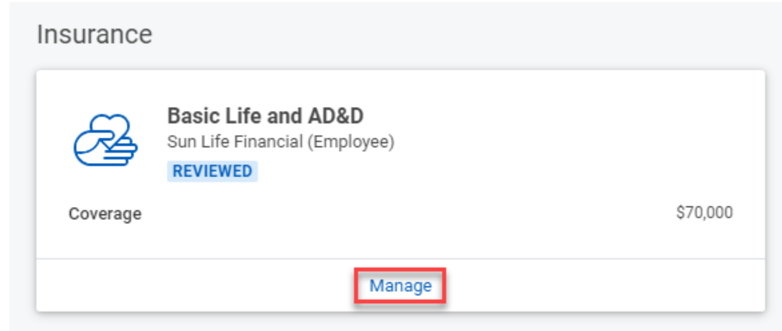
MANAGE BENEFICIARIES

A beneficiary is a designated individual who would receive your Life Insurance Benefit. You can change, edit, and add beneficiaries from the Benefits application.

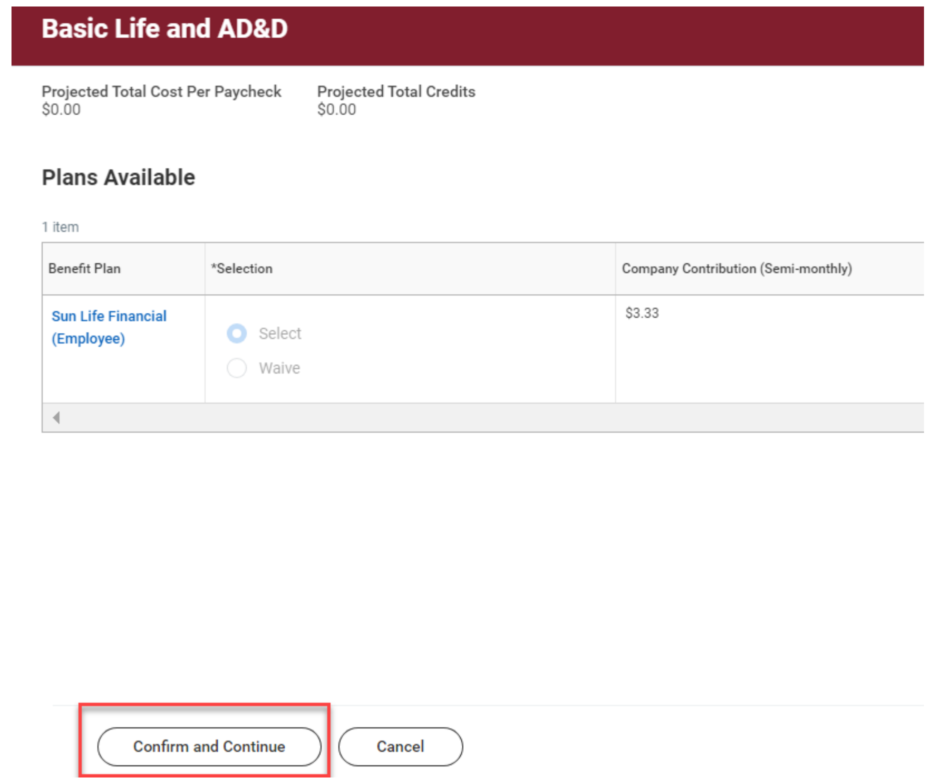
Note: If you are your assigning existing dependents or emergency contacts as beneficiaries, please go to Assigning Beneficiaries section on page 3

From the From your Home page:

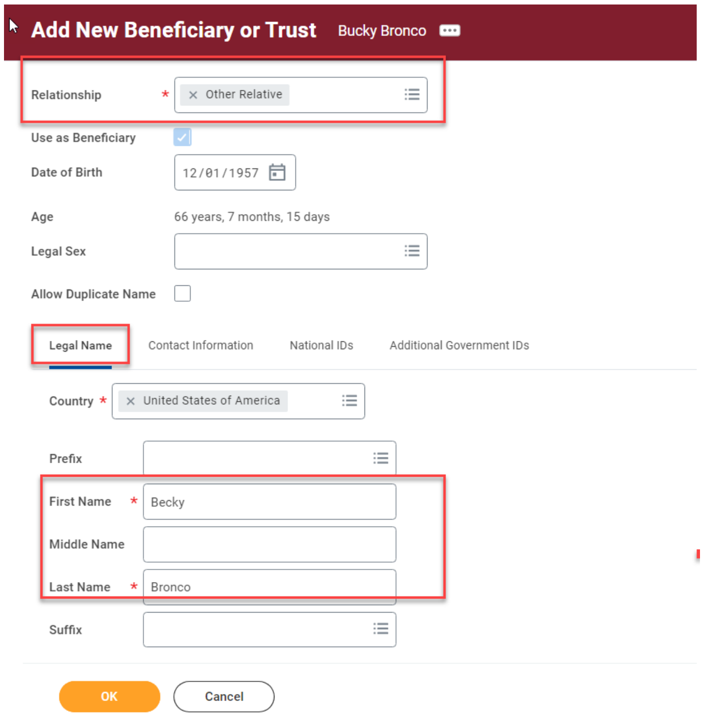
1. Click the **Inbox** icon.
2. Click the **Open Enrollment Change** task.
3. Click **Let's Get Started**.
4. All Life Insurance Plans that you are enrolled in/can enroll in will appear. Click **Manage** to add beneficiary.

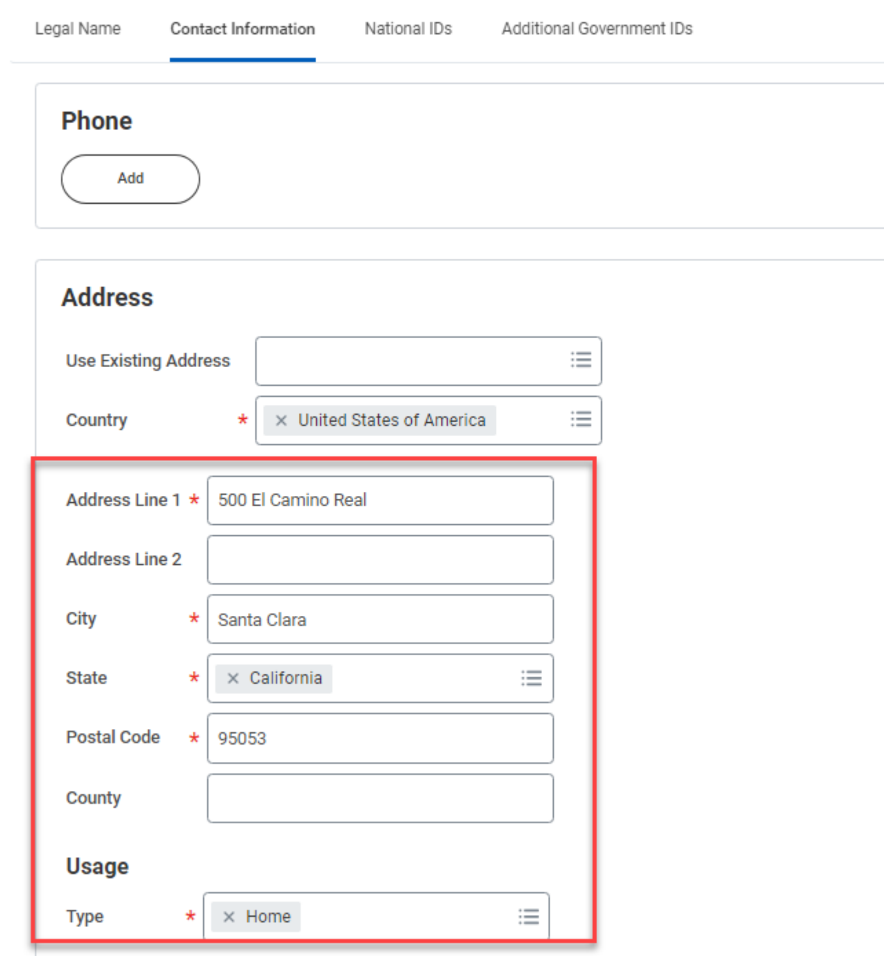


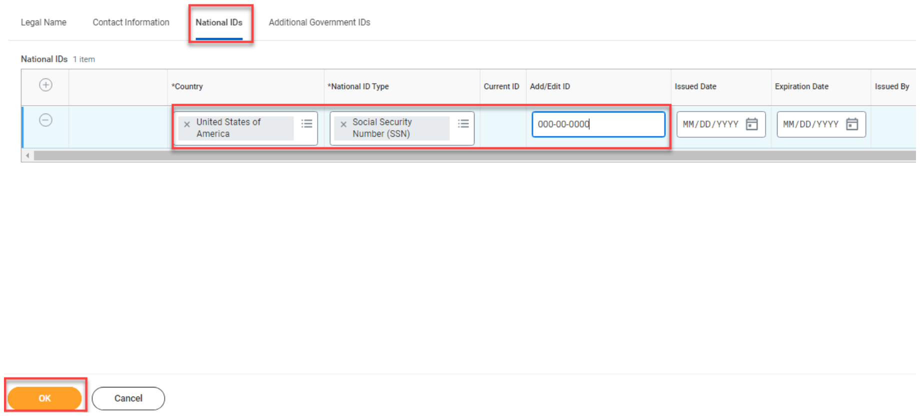
5. Review the plan information. Click **Confirm and Continue**



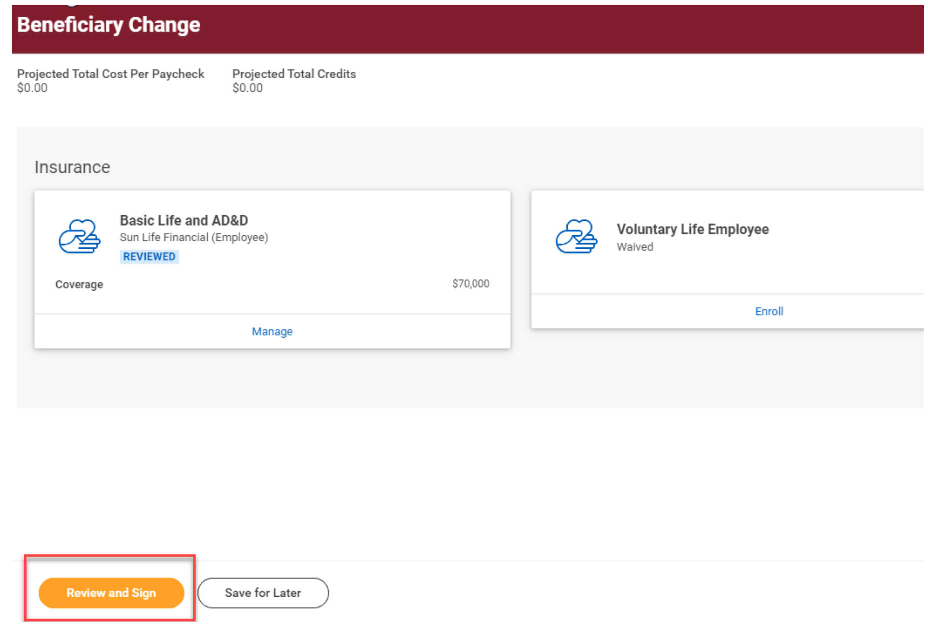
6. Click **Add Icon** In Beneficiary column to add beneficiary.
7. Click **Add Icon** In Beneficiary column to add beneficiary.
8. Click the **Prompt Icon** and select **Add New Beneficiary or Trust**
9. In the pop up window select if you are adding a **New Beneficiary** or **New Trust.**
10. Enter **all** required information, denoted by an asterisk.



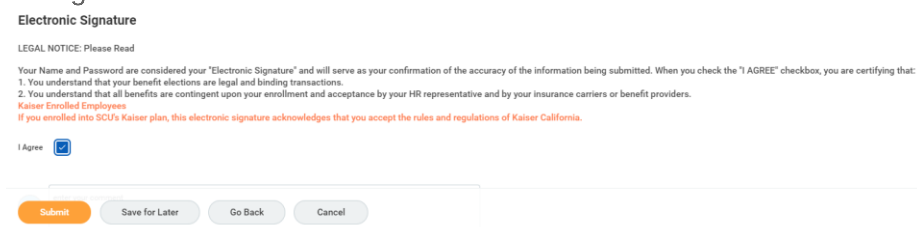




11. Click **OK** when done.
12. Make sure to add percentage that you are designating for this beneficiary/trust.
13. If adding more than one beneficiary to a plan, click the **Add Icon** to repeat the process. If you are adding more than one beneficiary, the total percentage must equal 100%.
14. Click **Save** when done.
15. When all changes complete you will be brought to the main page with a confirmation message about actions taken. Either update other plans or if done click **Review and Submit.**



16. Review your benefit elections and beneficiaries. Check off the **I Agree** box to provide an electronic signature confirming your changes.



17. Click **Submit.** This will finalize your Open Enrollment Benefits. You will have the opportunity to go back and edit through November 22, 2024.