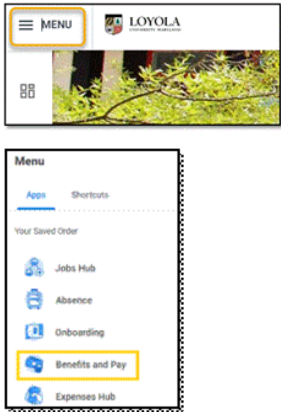


Beneficiary Changes in Workday

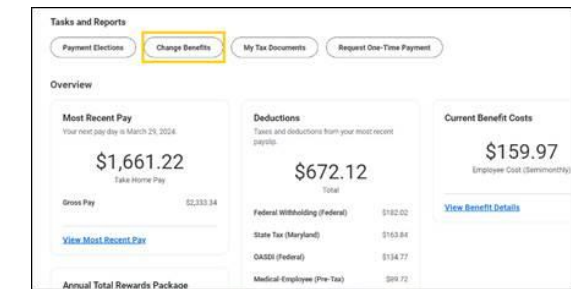
Body

1. After logging into Workday, click the **Menu** icon at the top left corner and select the **Benefits and Pay** app.



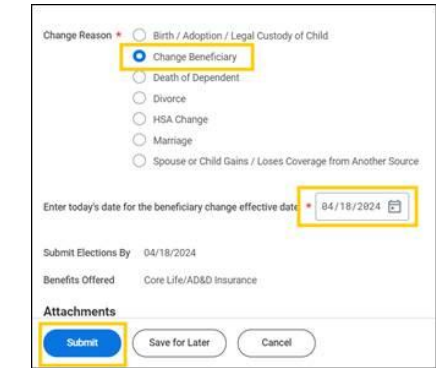
2. The **Benefits and Pay** app allows you to view all of your **Pay** details, **Deductions**, **Current Benefit Costs**, **Total Rewards**, and **Compensation** information.

At the top of the screen, select **Change Benefits**.

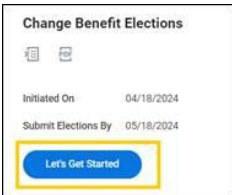
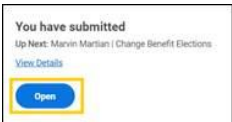


3. Select the change reason, **Change Beneficiary**. You will then be prompted to enter the effective date of the beneficiary change.

After entering those details, select **Submit**.



4. Click on either the **Open** option in the window that pops up or navigate to your **Inbox** in the top right corner of your screen, select the **Change Beneficiary** event you submitted and click **Let's Get Started**.



5. To change or edit the beneficiaries for your coverage, click on **Manage** for each coverage type you wish to change.

The screenshot shows the 'Insurance' section of a user interface. It features a shield icon and the title 'Core Life/AD&D Insurance'. Below the title, it says 'Symetra Option 2: 1 X Salary up to \$250,000 (Employee)'. Underneath, it indicates 'Coverage' and '1 X Salary'. At the bottom right, there is a yellow-bordered button labeled 'Manage'.

6. Your benefit plan will show up but is not editable. Click **Confirm and Continue**.

The screenshot shows the 'Plans Available' screen. It has a table with columns for 'Benefit Plan', '*Selection', and 'Company Contribution (Semi-monthly)'. The first row shows 'Symetra Option 1: 1 X Salary up to \$50,000 (Employee)' with 'Select' and 'Waive' radio buttons. The second row shows 'Symetra Option 2: 1 X Salary up to \$250,000 (Employee)' with 'Select' and 'Waive' radio buttons. The company contribution for the second option is '\$3.14'. At the bottom, there are two buttons: 'Confirm and Continue' (highlighted with a yellow border) and 'Cancel'.

7. If you're adding a new beneficiary in Workday for the first time, click on + icon in the **Primary Beneficiaries** area. If you're editing existing beneficiaries, skip to step 8.

You will then need to click in the **empty box** that generated and select **Add New Beneficiary or Trust**. Select which you'd prefer to add and then you'll be prompted to enter the details for your beneficiary or trust.

Once entered, the percentage for all beneficiaries together **must total 100%**. Percentages can only be entered in whole numbers. You can also add **secondary beneficiaries**, if desired.

The screenshot shows the 'Beneficiaries' screen. It has a header 'Beneficiaries' and a sub-header 'Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.' Below this, there are two sections: 'Primary Beneficiaries' and 'Secondary Beneficiaries'. In the 'Primary Beneficiaries' section, there is a list of options: 'Existing Beneficiary Persons', 'Existing Trusts', and 'Add New Beneficiary or Trust' (highlighted with a yellow border). There is also a 'Search' field. To the right, there is a 'Percentage' field with a value of '0'.

8. If the beneficiaries already exist in Workday and you need to remove or change their allocation percentage, **deselect** the dependent in the list or **alter the percentage** accordingly. Once completed, click **Save**.

The screenshot shows the 'Beneficiaries' screen. It has a header 'Beneficiaries' and a sub-header 'Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.' Below this, there are two sections: 'Primary Beneficiaries' and 'Secondary Beneficiaries'. In the 'Primary Beneficiaries' section, there is a table with columns 'Beneficiary' and 'Percentage'. The first row shows 'Baby Martian' with a percentage of '100' (highlighted with a yellow border). In the 'Secondary Beneficiaries' section, there is a table with columns 'Beneficiary' and 'Percentage', and it shows 'No Data'. At the bottom, there are two buttons: 'Save' (highlighted with a yellow border) and 'Cancel'.

9. Click Review and Sign.

The screenshot shows two buttons: 'Review and Sign' (highlighted with a yellow border) and 'Save for Later'.

10. The summary page will display the beneficiaries for the applicable plans. Please review this to ensure it is correct. At the bottom of the page is the Electronic Signature for you to review and click **I Accept**. Once you've clicked, **I Accept**, press **submit**.

Electronic Signature

Legal Notice: Please Read

Your name and Password are considered your "Electronic Signature" and will serve as y

- You understand and approve the enrollment as indicated above. You hereby auth
- You understand and acknowledge that under the Internal Revenue Code regulatio
- You understand that you will not pay income tax or FICA tax on my medical, dent
- Each year, during the annual enrollment period, you will have the option to chang
- If you decline medical insurance enrollment for yourself or your dependents, inclu

your other coverage ends. In addition, if you have a new spouse or dependent as

I Accept

☐

Submit

Save for Later

Cancel

Details

Details
<div><div>Article ID: 151477</div><div><div>Created</div><div>Thu 5/23/24 9:58 AM</div></div></div> <div><div>Modified</div><div>Tue 6/11/24 3:49 PM</div></div>