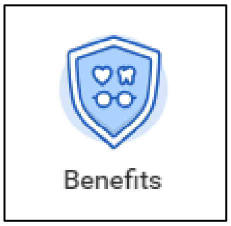
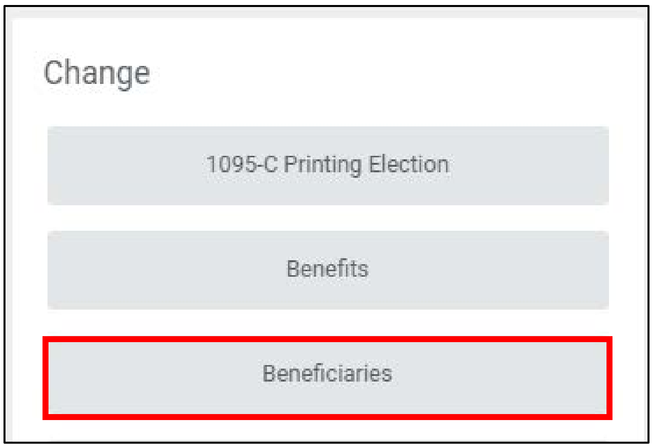
Updating/Adding Beneficiaries in Workday

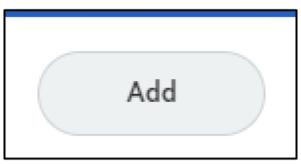
1) Review current beneficiaries by logging into Workday via https://sso.tamus.edu and clicking the Benefits icon from your Workday homepage.



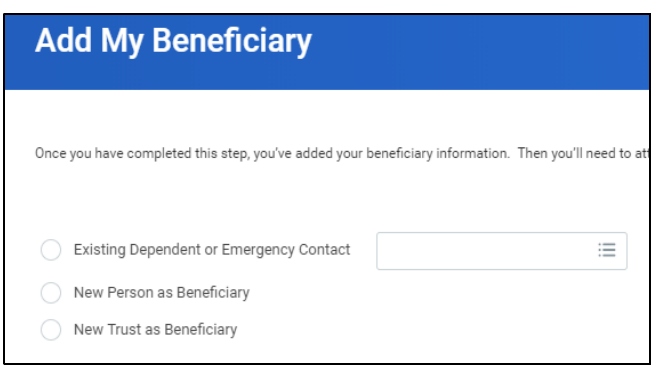
2) Under Change, click Beneficiaries.



3) To add a new beneficiary, click Add.



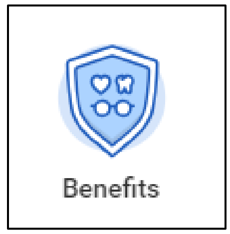
4) If you have used the person as an emergency contact or a dependent for insurance, click “Existing Dependent or Emergency Contact”. This will pre-fill some of the beneficiary’s information. Otherwise, choose to add a new beneficiary or a new trust.



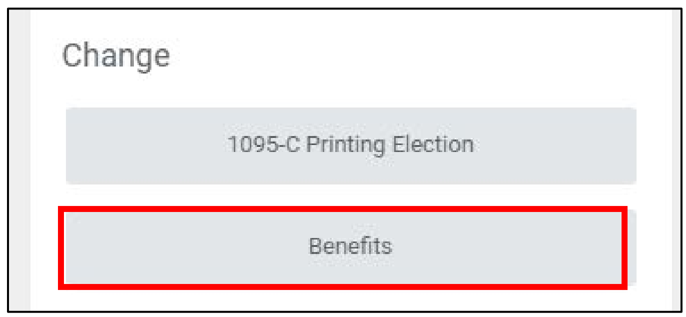
5) Once you’ve added your beneficiary’s information, click Submit.

6) To designate beneficiaries for your life insurance policy(ies), return to your Workday homepage.

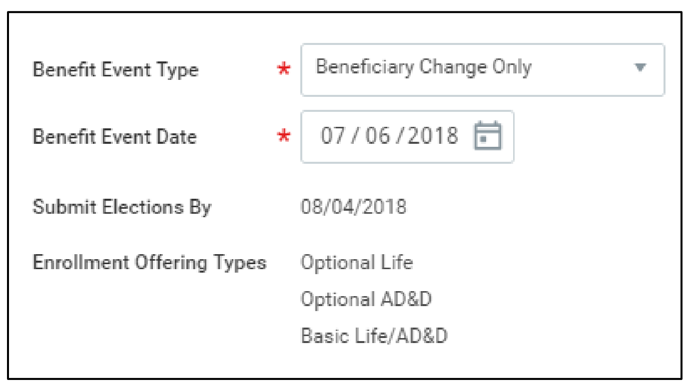
7) Click again on the Benefits icon.



8) Under Change, click Benefits.



9) Choose “Beneficiary Change Only” as the Benefit Event Type, and today’s date as the Benefit Event Date.



10) Click Submit.

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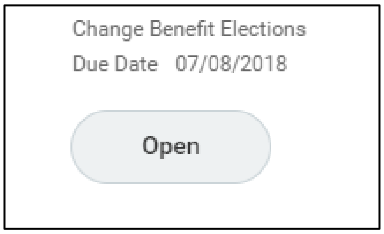
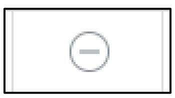
11) Click Open.

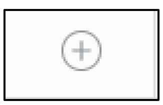


12) Click Continue at the bottom of the page until you reach the beneficiary designation page.

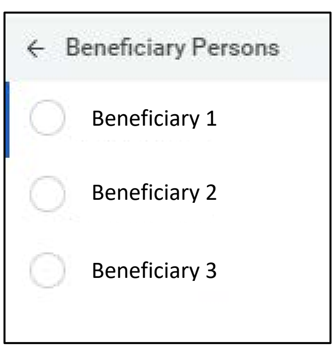
13) To remove a current beneficiary, click the (-) next to the beneficiary's name next to each of your life insurance policies.



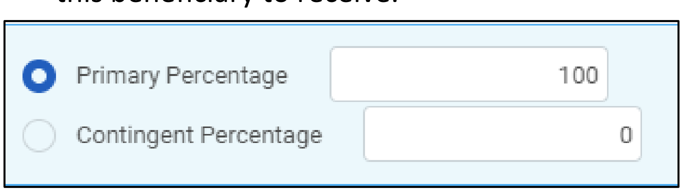
14) To add a new beneficiary, click the (+) sign.



15) Click Beneficiary Persons or Trusts as appropriate. If choosing a person, select the beneficiary you want to designate for each life insurance plan.



16) Choose this beneficiary as a primary or contingent beneficiary, and select the percentage of the policy you would want this beneficiary to receive.



17) Repeat this process until you have designated all primary and contingent beneficiaries for each of your life insurance plans.

18) Once you've completed your beneficiary designations, click Submit.