Updating/Adding Beneficiaries in Workday

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



2) Under Change, click Beneficiaries.

Change		
	1095-C Printing Election	
	Benefits	
	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.

Add My Beneficiary	
Once you have completed this step, you've added your t	eneficiary information. Then you'll need to at
Existing Dependent or Emergency Contact	:=
New Person as Beneficiary	
New Trust as Beneficiary	

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



- 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.

Change		
	1095-C Printing Election	
2	Benefits	

 Choose "Beneficiary Change Only" as the Benefit Event Type, and today's date as the Benefit Event Date.

Benefit Event Type	*	Beneficiary Change Only	•
Benefit Event Date	*	07/06/2018 💼	
Submit Elections By		08/04/2018	
Enrollment Offering Types		Optional Life	
		Optional AD&D	
		Basic Life/AD&D	

10) Click Submit.

Updating/Adding Beneficiaries in Workday

11) Click Open.



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

Continue	Save for Later	Cancel	
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 To remove a current beneficiary, click the (-) next to the beneficiary's name next to each of your life insurance policies.

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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.

0	Primary Percentage	100	
	Contingent Percentage	(נ

- 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.