

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

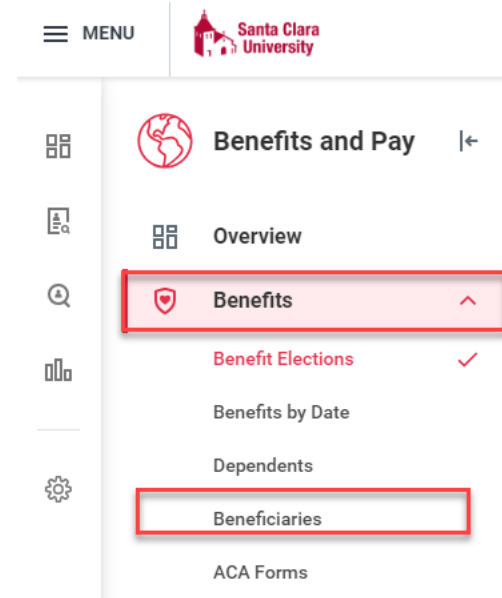
A beneficiary is a designated individual who would receive your Life Insurance Benefit. You can change, edit, and add beneficiaries from the Benefits application.



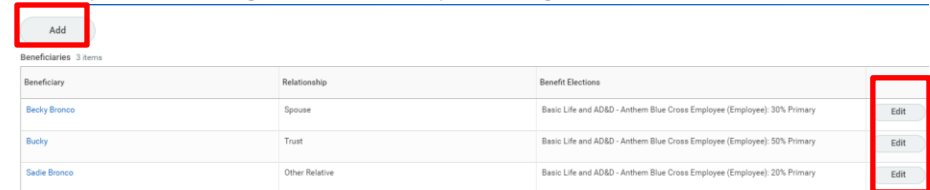
Note: If you are your assigning existing dependents or emergency contacts as beneficiaries, please go to Assigning Beneficiaries section on page 3

From the **Benefits and Pay** application:

1. From the Navigator Pane expand **Benefits** and select **Beneficiaries**



2. View existing beneficiaries for enrollment in benefit plans or modify the existing information by clicking **Edit**. OR



Select **Create a New Beneficiary** to add a new beneficiary or **Create a New Trust as Beneficiary** to add a trust.

3. Click **OK**.

Add My Beneficiary

- Create a New Beneficiary
- Create a New Trust as Beneficiary

OK

Cancel

OK

Cancel

4. Enter all required information, denoted by an asterisk.

Beneficiary Personal Information

Legal Name

Legal Name *
Bronx Bronco



Relationship

Relationship *
Friend



Date of Birth

Date of Birth



Gender

Gender



5. Click **Submit**.

Submit

Save for Later

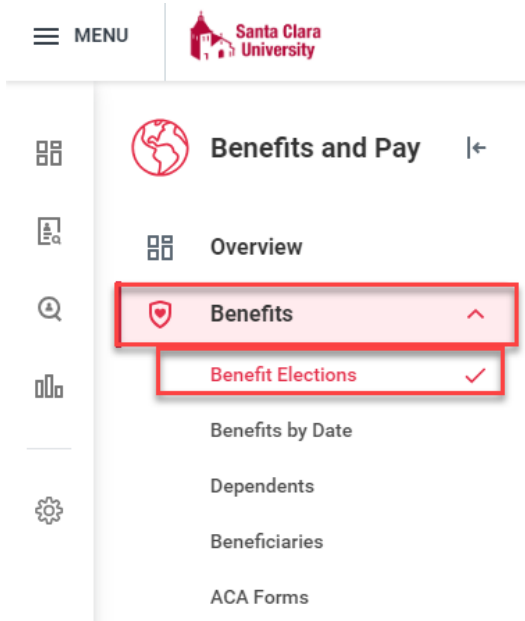
Cancel

ASSIGNING BENEFICIARIES

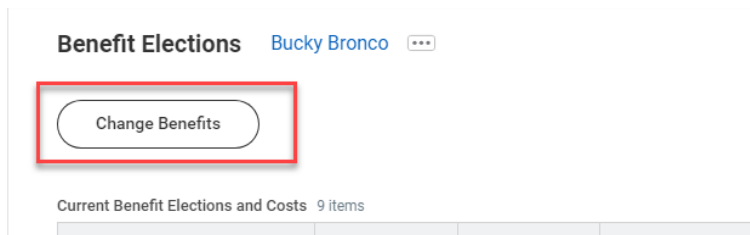
Employees can view and update beneficiary assignment to Life Insurance(s).

From the **Benefits and Pay** application:

1. From the Navigator Pane expand **Benefits** and select **Benefit Elections**



2. Click **Change: Benefits**



3. Select Change Reason: **Beneficiary Change** and add the effective date.
4. Click the **Calendar** icon to enter the Benefit Event Date.
5. Click **Submit**.

Bucky Bronco ...

Change Reason * Beneficiary Change

Benefit Event Date * 03/01/2024

Submit Elections By 03/30/2024

Benefits Offered Basic Life and AD&D
Voluntary Life Employee

Attachments



enter your comment

Submit Save for Later Cancel

6. Open the **Change Benefit Election** event.

You have submitted
 Up Next: Bucky Bronco | Change Benefit Elections
[View Details](#)
Open

7. Click **Let's Get Started**



8. All Life Insurance Plans that you are enrolled in/can enroll in will appear. Click **Manage** to add beneficiary.

Insurance

Basic Life and AD&D
 Sun Life Financial (Employee)
 REVIEWED

Coverage \$70,000

Manage

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

Basic Life and AD&D

Projected Total Cost Per Paycheck \$0.00 Projected Total Credits \$0.00

Plans Available

1 Item

Benefit Plan	*Selection	Company Contribution (Semi-monthly)
Sun Life Financial (Employee)	<input checked="" type="radio"/> Select <input type="radio"/> Waive	\$3.33

Confirm and Continue Cancel

- 10. Click **Add Icon** In Beneficiary column to add beneficiary.
- 11. Click the **Prompt Icon** and select **Beneficiary Persons** or **Trust** to see the list of Beneficiaries available. Click the name of the person you want to assign
- 12. Enter the Primary or Contingent Percentage for the beneficiary.
- 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%.

Coverage

Coverage \$70,000
 Calculated Coverage \$70,000.00

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 1 item

10	Beneficiary	Percentage
-	x Bucky Bronco ...	100

11 12

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**.

Beneficiary Change

Projected Total Cost Per Paycheck \$0.00
 Projected Total Credits \$0.00

Insurance

Basic Life and AD&D
 Sun Life Financial (Employee)
 REVIEWED

Coverage \$70,000

Manage

Voluntary Life Employee
 Waived

Enroll

Review and Sign Save for Later

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

Electronic Signature

LEGAL NOTICE: Please Read

Your Name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I AGREE" checkbox, you are certifying that:

- You understand that your benefit elections are legal and binding transactions.
- You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

Kaiser Enrolled Employees
 If you enrolled into SCU's Kaiser plan, this electronic signature acknowledges that you accept the rules and regulations of Kaiser California.

I Agree

Submit Save for Later Go Back Cancel

17. Click **Submit**