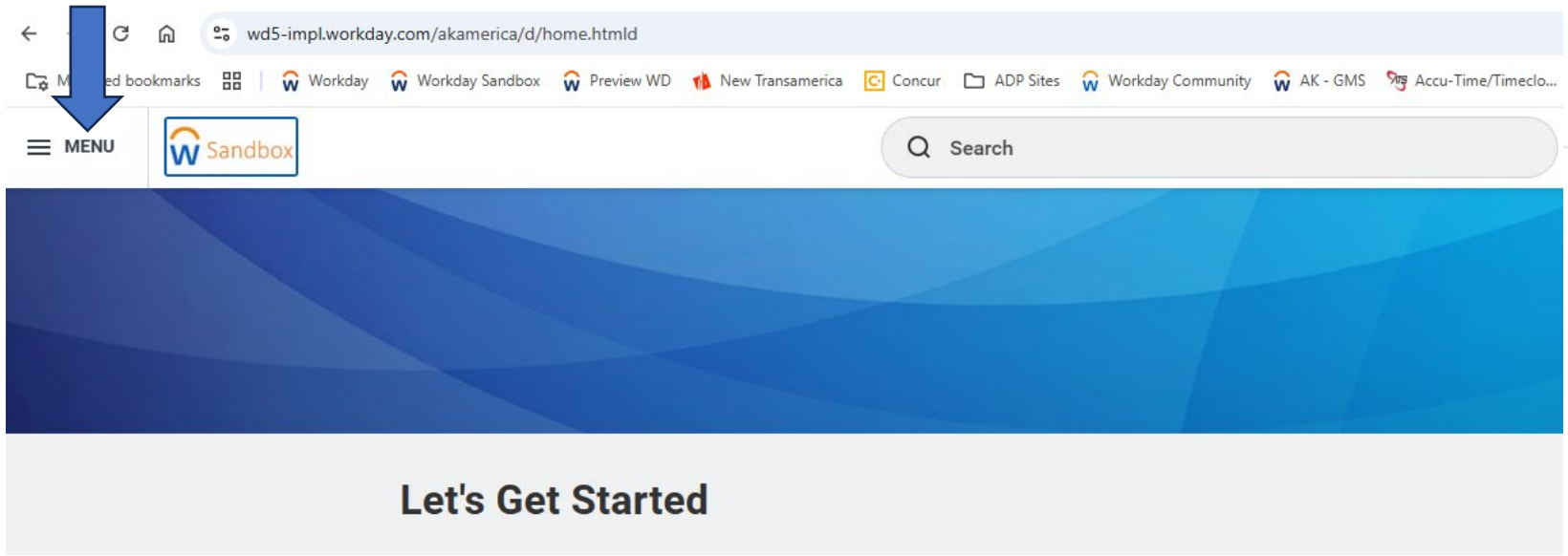
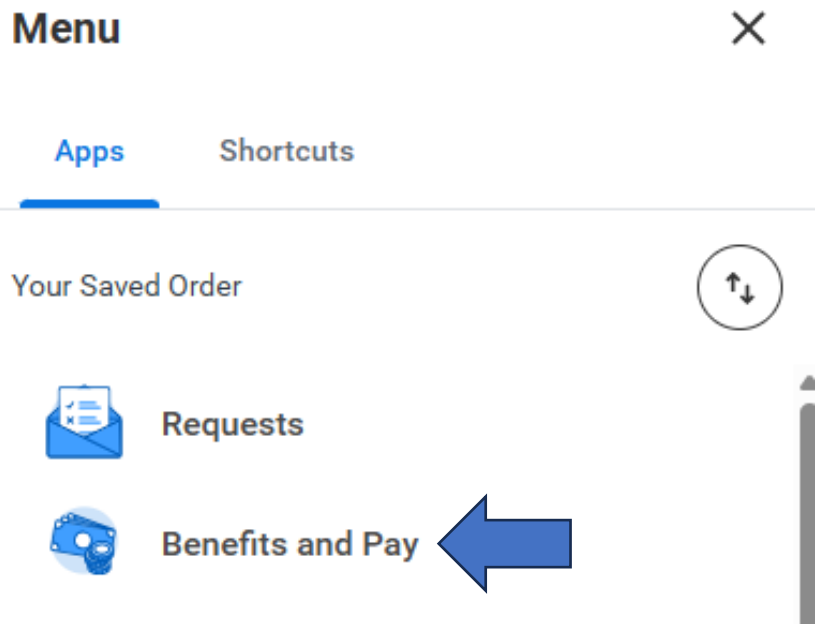
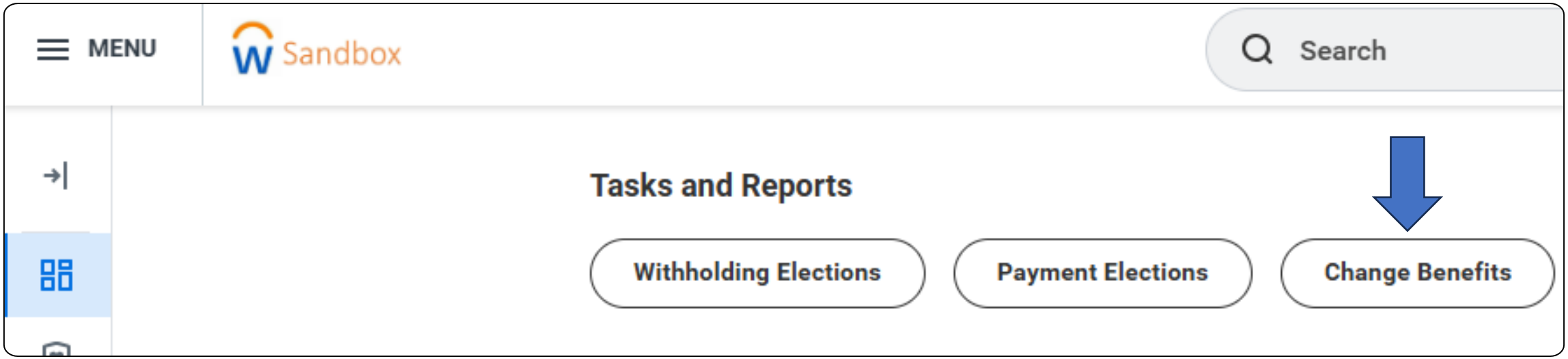
Changing Beneficiaries

- In Workday locate the Menu Icon
- Select Benefit & Pay



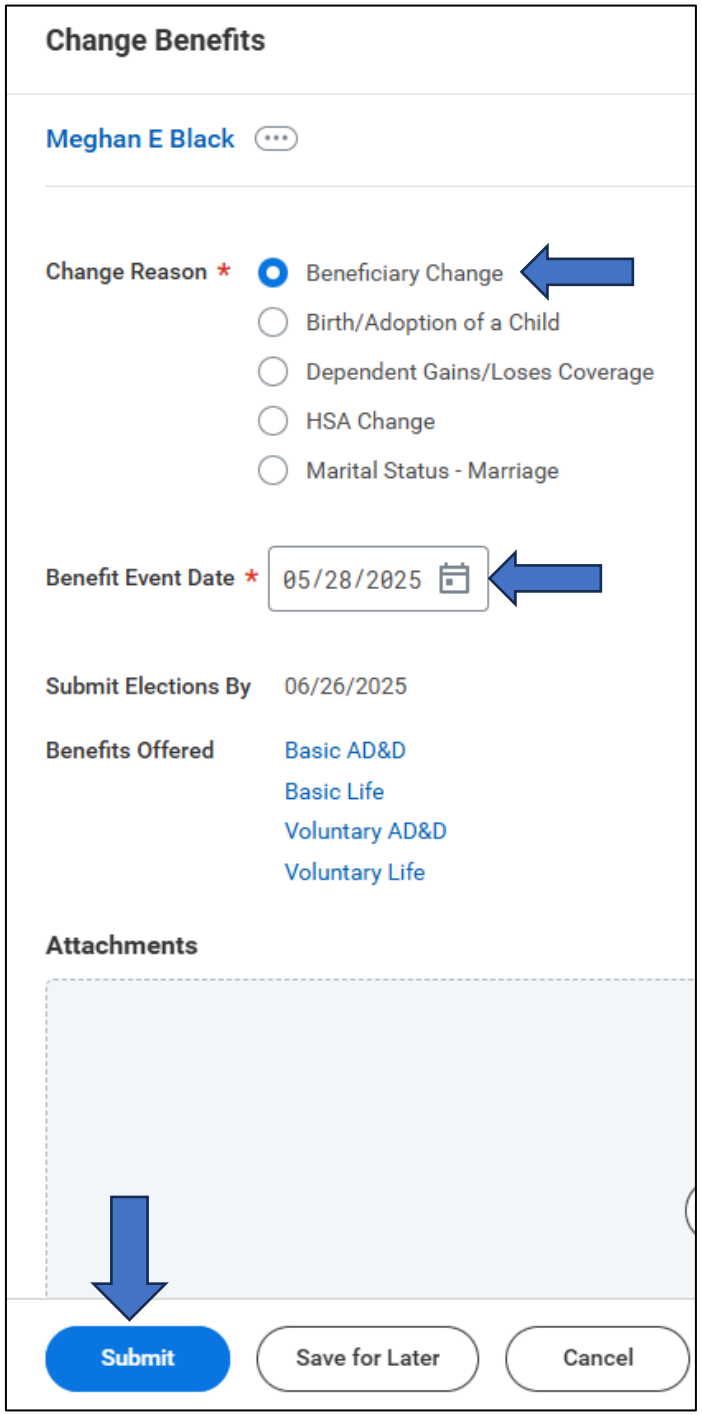




- From Tasks and Reports select Change Benefits icon

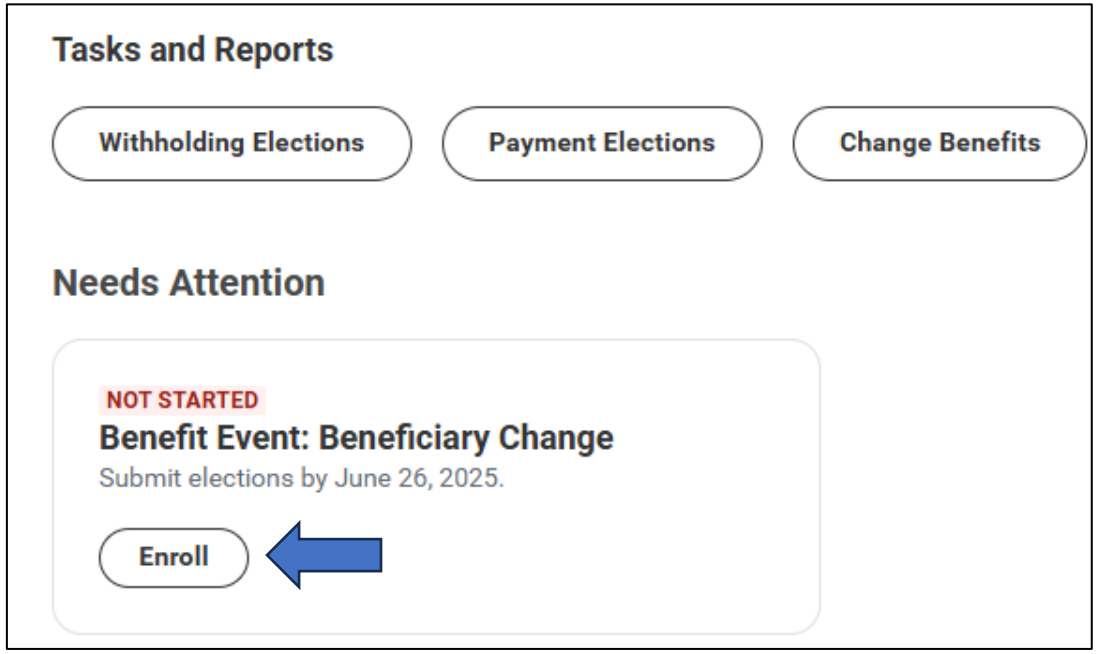
- Select Beneficiary Change as the Change Reason
- Add Date and Submit

Once submitted, Workday will create a task for you to complete.

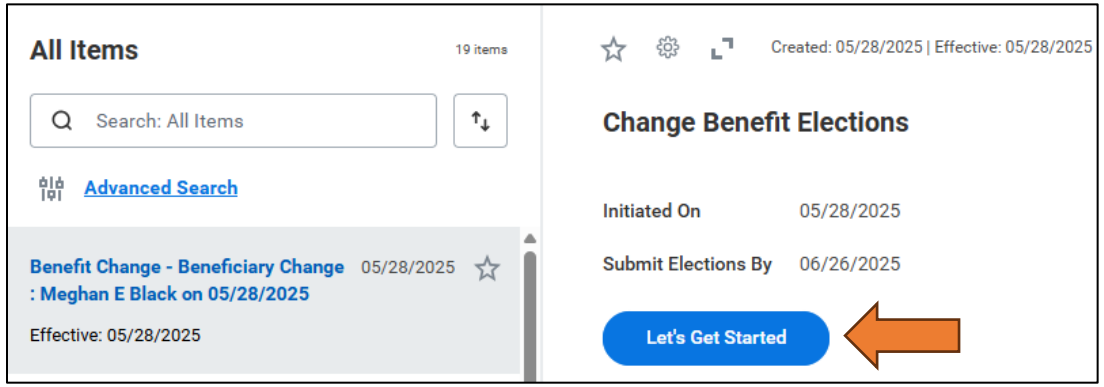


Workday Task

Option 1 – Benefit & Pay Section

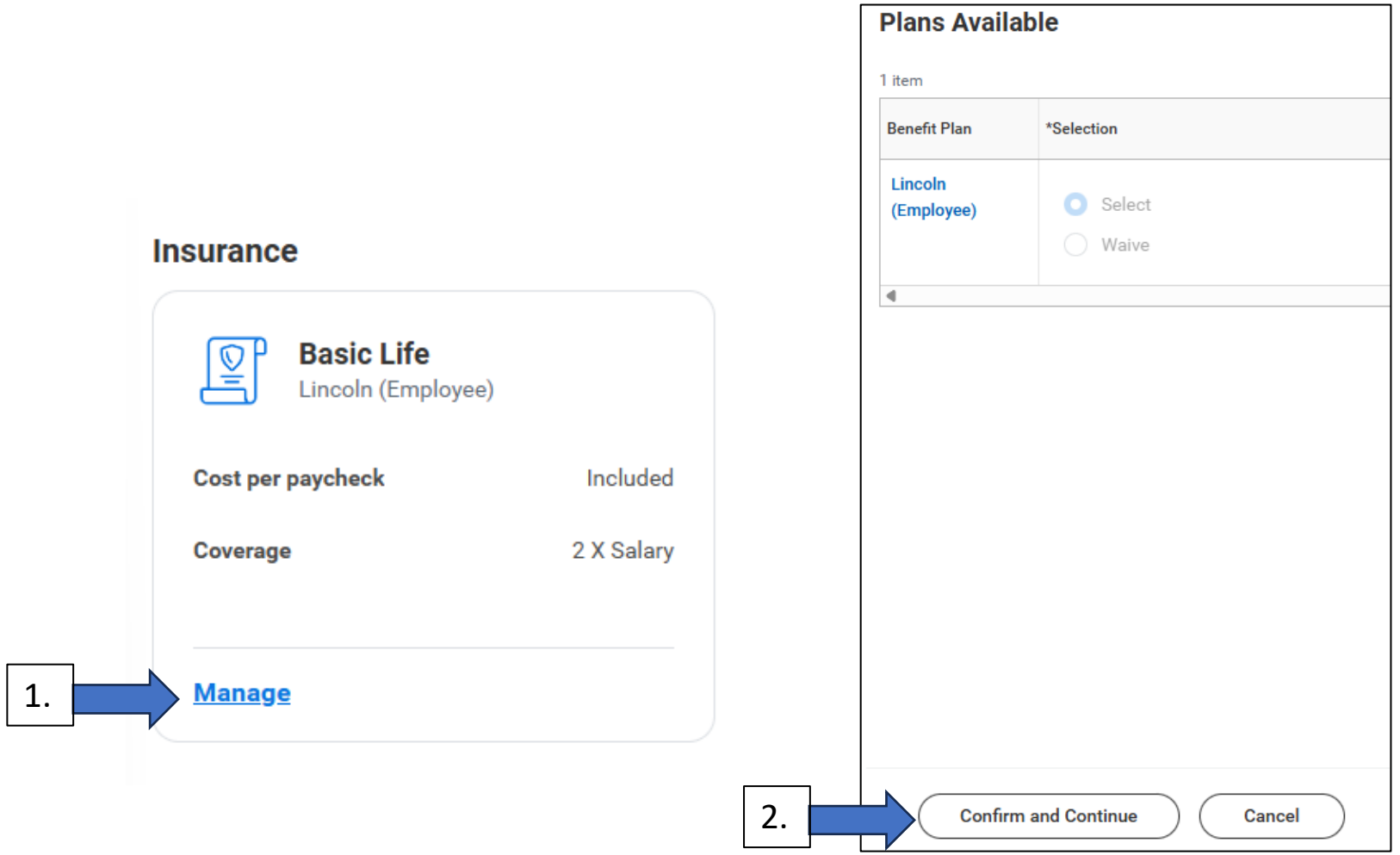


Option 2 – Workday Inbox

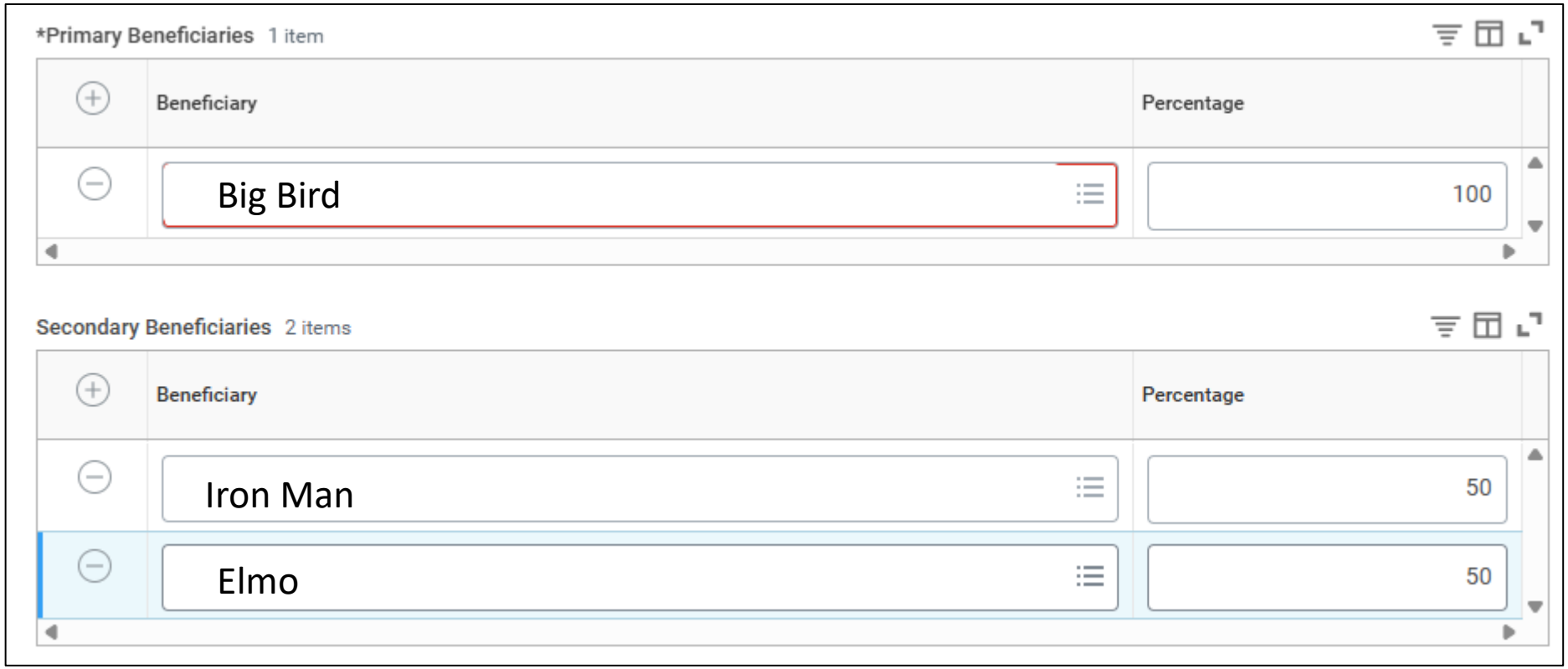


1.Select the plan(s) to update by select Manage under the plan(s)

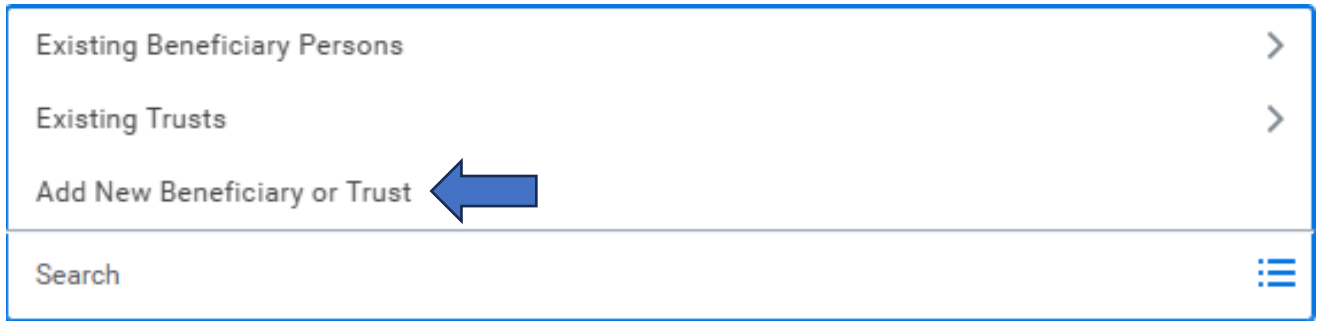
2.Then Confirm and Continue

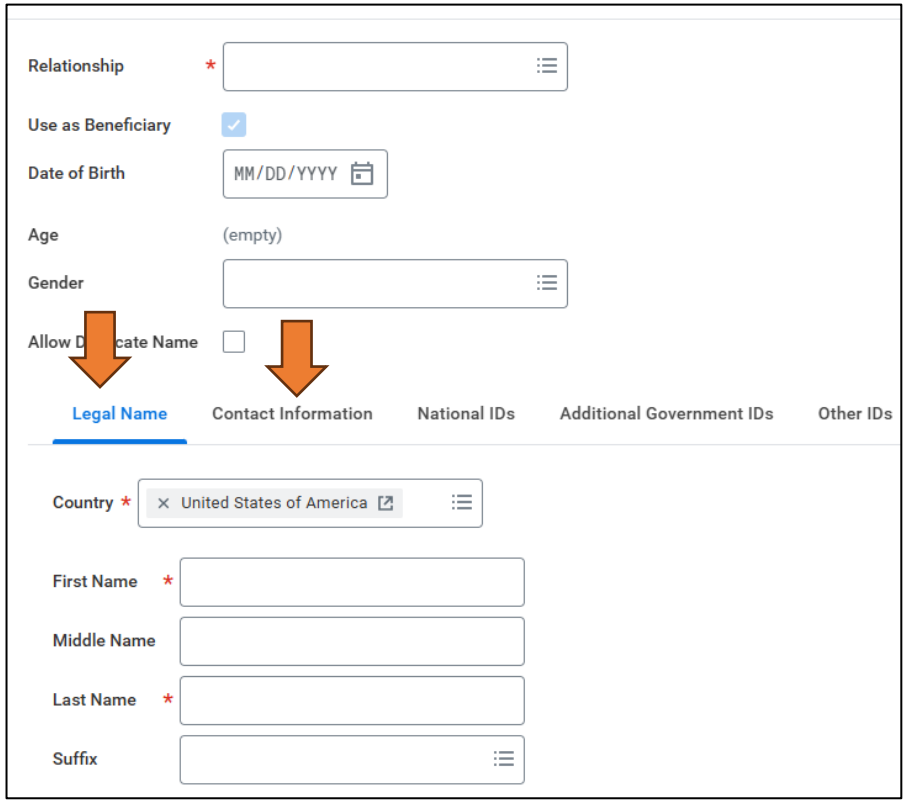


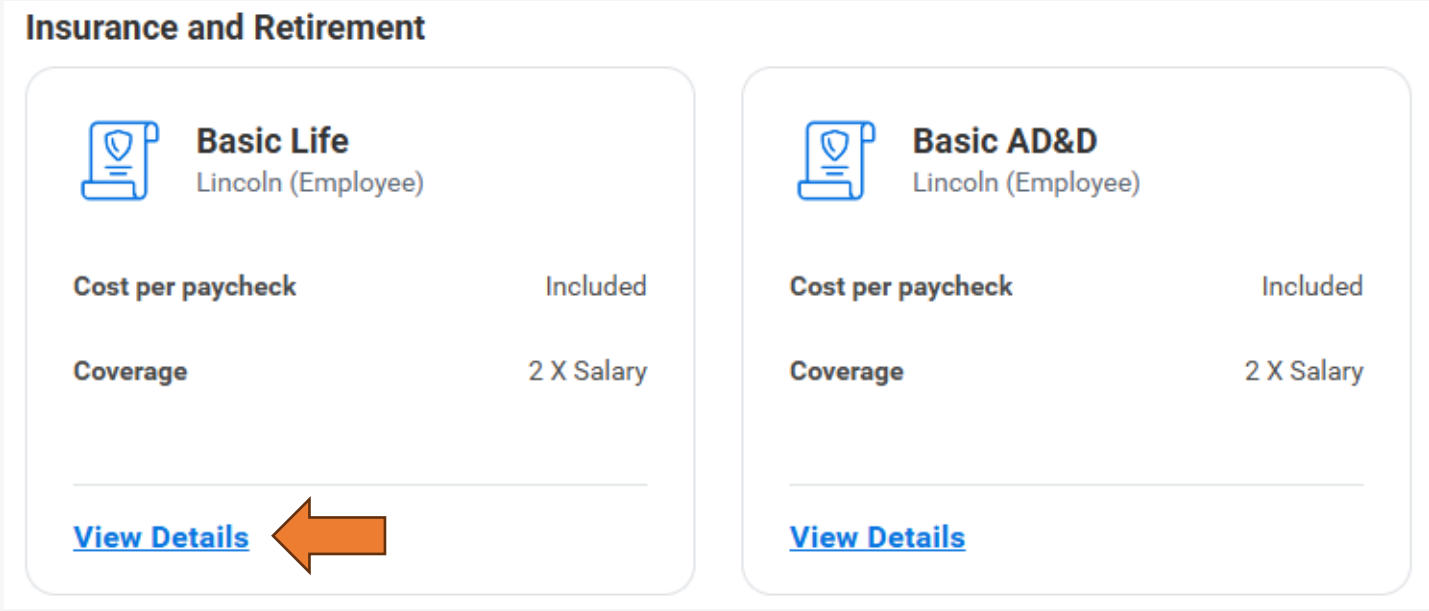
- Here you can update beneficiaries, by using the drop-down menu
  - Existing Persons or Trusts



- If you do not have Existing Beneficiary or Trust you can add from the same screen, by selecting “Add New Beneficiary or Trust” and follow the prompts.
  - Fill in Contact Information phone number and address







- Once you have updated all plans, select Review and Sign at bottom of screen
- Review the summary of the changes you made, read notice, select check box and “Submit”
- You can view your changes on the Benefits page by selecting on the View Details