

## Workday: Add/Update Beneficiary Job Aid

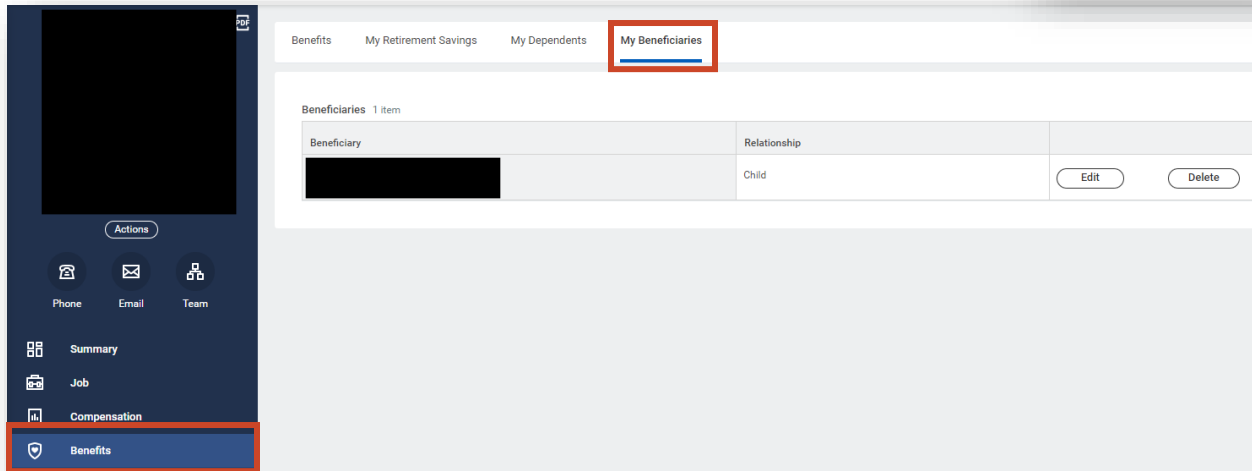
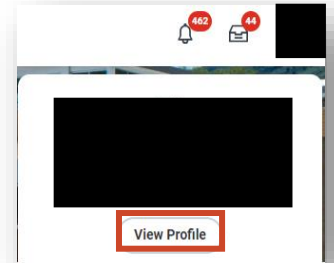
In this job aid we will cover how to create your beneficiary list and then how to add/update your beneficiaries.

Start by logging into Workday at [workday.mines.edu](http://workday.mines.edu).

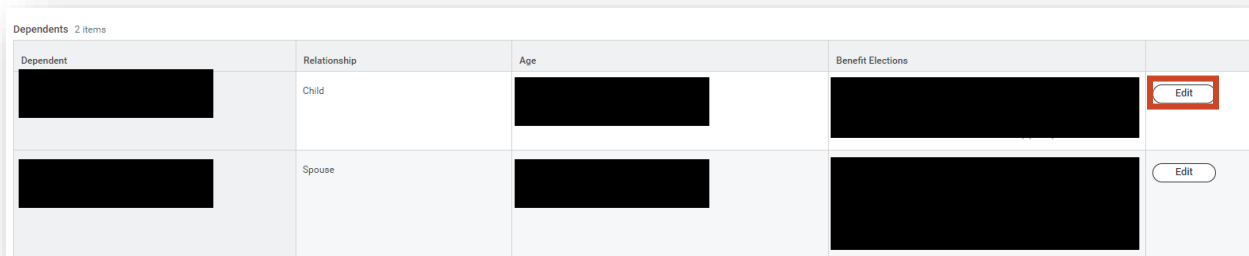
### Create Beneficiary List

The following steps are helpful for you to have a list of beneficiaries set up in Workday. When you are ready to assign beneficiaries, you will not need to add all their details in as you can select them from an existing list.

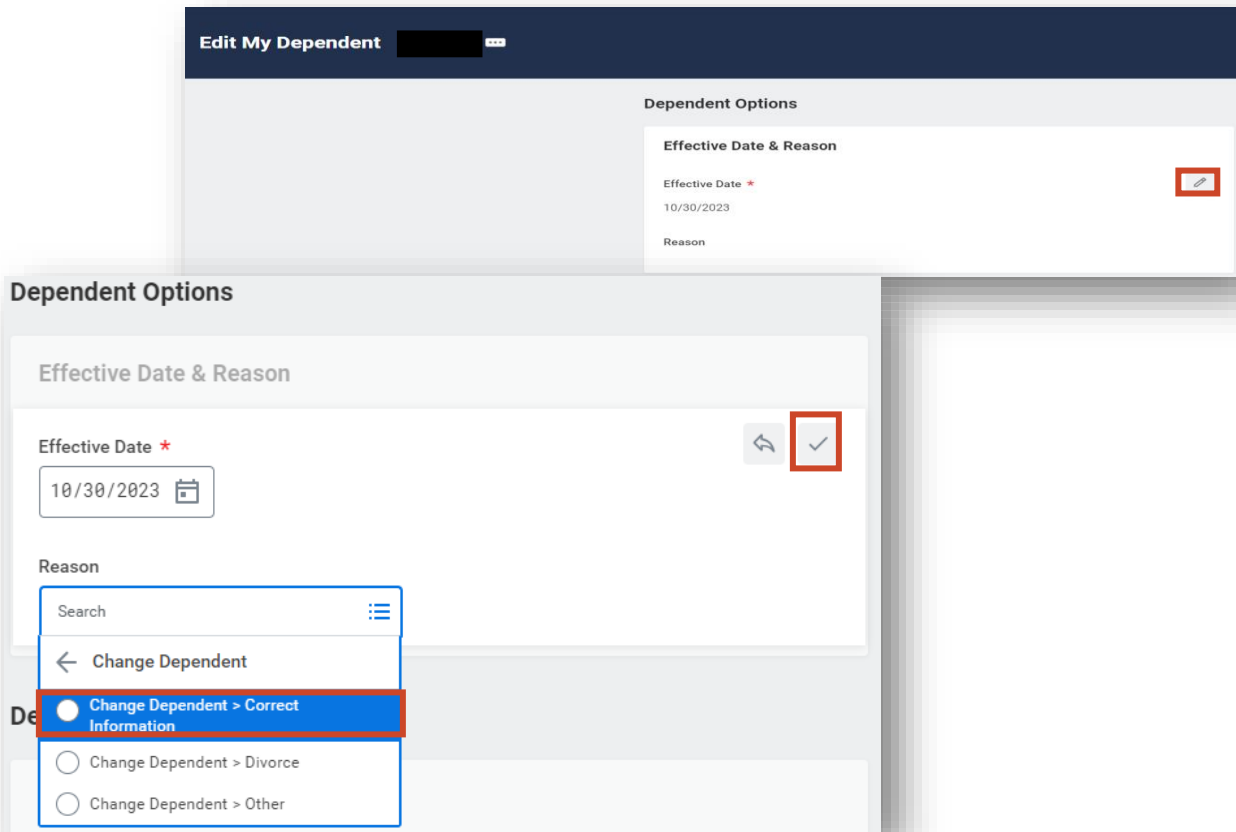
- 1) Click on your picture and select **View Profile**.
- 2) Click **Benefits** on the left, then select **My Beneficiaries** on the right to view your list of beneficiaries.



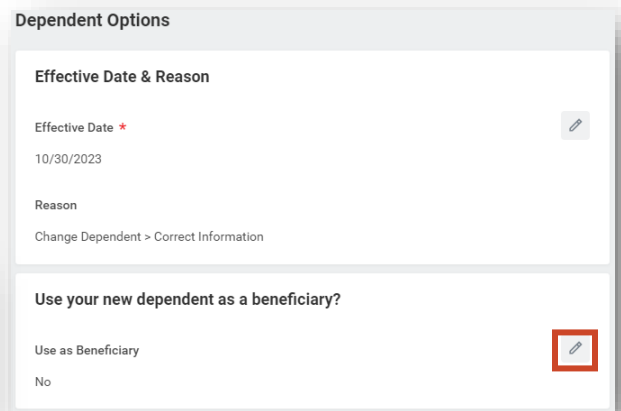
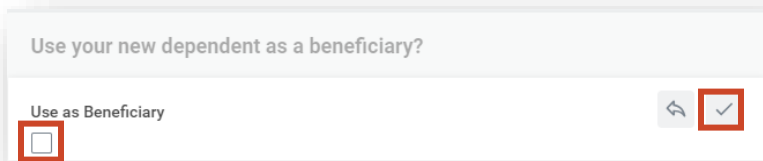
- 3) If you have existing dependents but notice they do not show as beneficiaries, you can edit each dependent to add them to your beneficiary list. Select **My Dependents** to view dependents. Click **Edit** for the dependent you want to update.
- 4) On the **Edit My Dependent** page, click the pencil icon to edit.



- a. Click in the **Reason** field, select **Change Dependent**, then select the **Change Dependent>Correct Information** radio button. Click the **checkmark** to save the change.



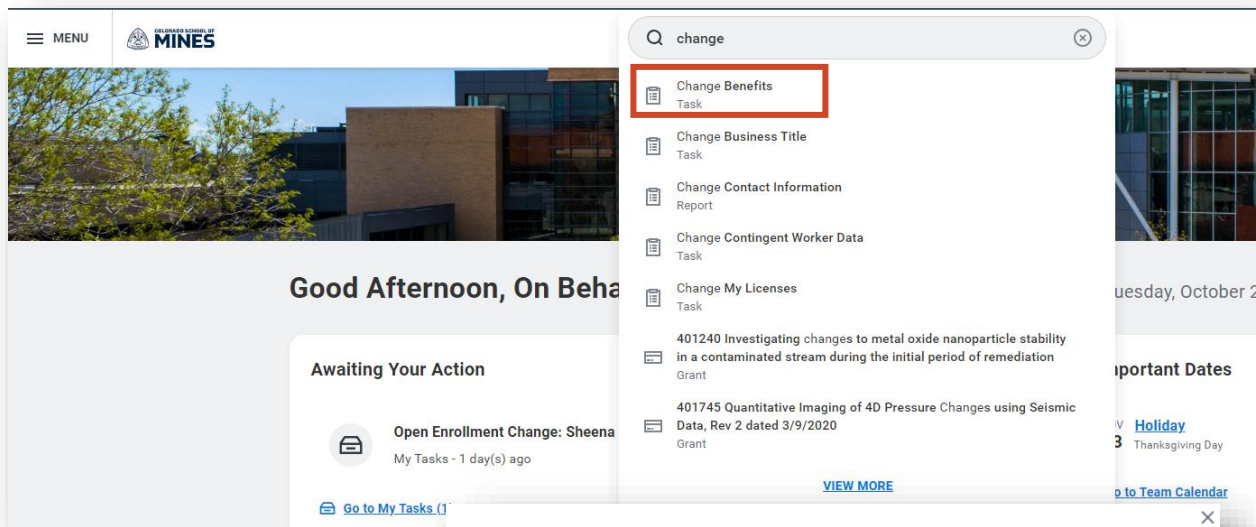
- b. Now click the pencil icon to edit the **Use your new dependent as a beneficiary?**
- c. Click the **Use as Beneficiary** checkbox then the **checkmark** to save the change.



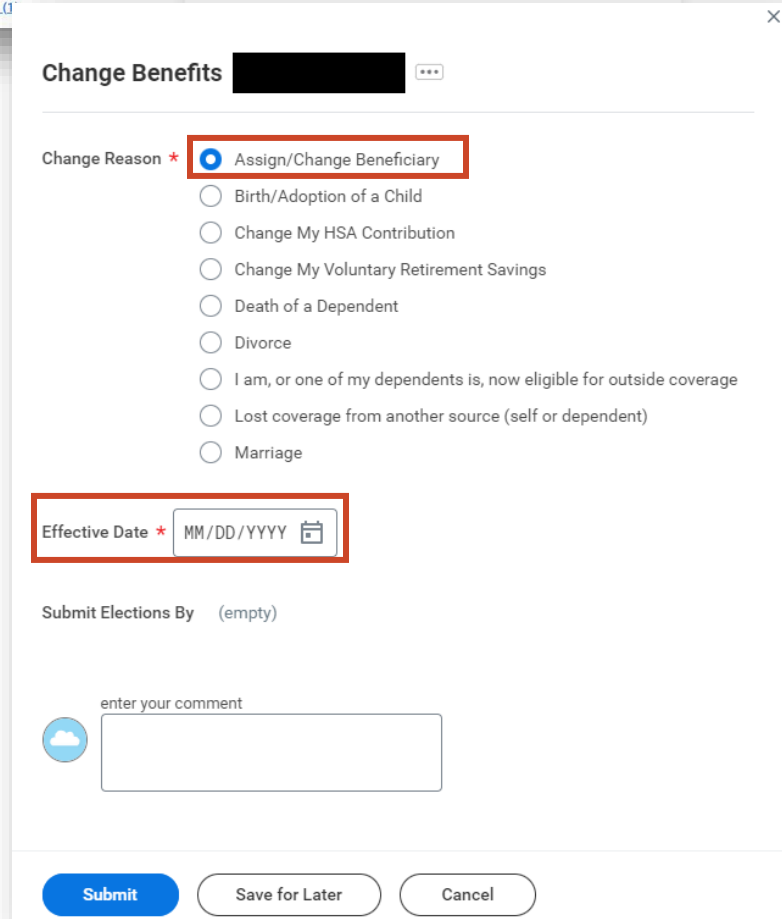
- d. Click **Submit**.
- e. Follow the above steps to add more beneficiaries to your list. **Note:** Updating this section for current dependent does not mean you have assigned your beneficiary. You have just added them to your beneficiary list.

## Add/Update Beneficiaries

1) Type and select **Change Benefits** in the search bar.



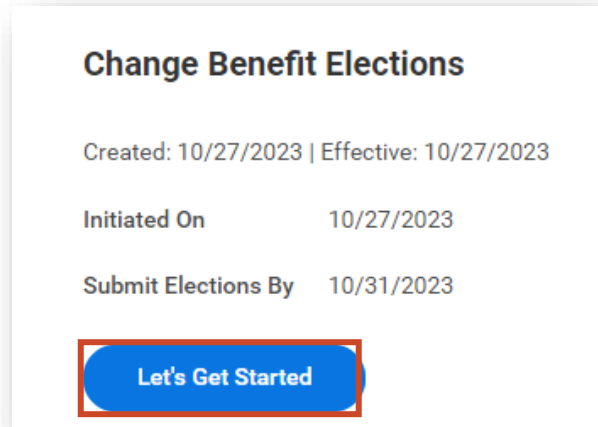
2) Check **Assign/Change Beneficiary** and add **Effective Date** for the change.

A screenshot of the 'Change Benefits' form. The title 'Change Benefits' is followed by a redacted name and a three-dot menu icon. The 'Change Reason' field is marked with a red asterisk and has a red box around the selected option 'Assign/Change Beneficiary'. Other options include 'Birth/Adoption of a Child', 'Change My HSA Contribution', 'Change My Voluntary Retirement Savings', 'Death of a Dependent', 'Divorce', 'I am, or one of my dependents is, now eligible for outside coverage', 'Lost coverage from another source (self or dependent)', and 'Marriage'. Below this, the 'Effective Date' field is marked with a red asterisk and has a red box around it, showing the format 'MM/DD/YYYY' and a calendar icon. The 'Submit Elections By' field is empty. There is a text input field for 'enter your comment' with a blue speech bubble icon to its left. At the bottom, there are three buttons: 'Submit' (blue), 'Save for Later' (white), and 'Cancel' (white).

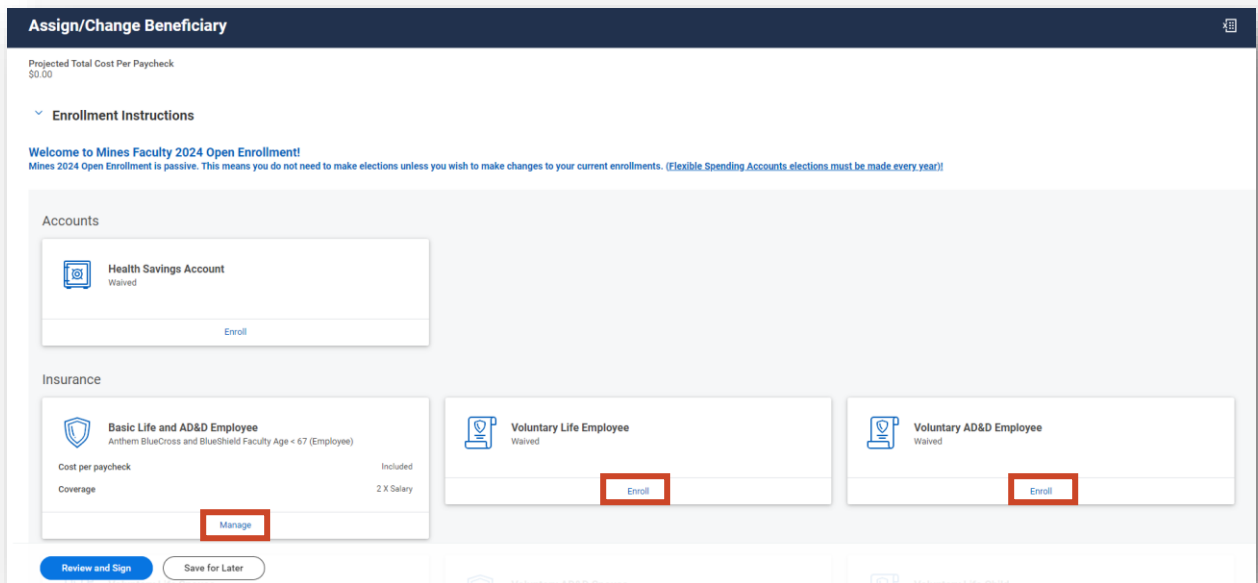


3) Click **Submit**.

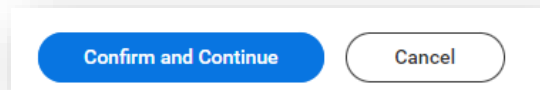
4) You now have a **Benefit Change – Assign/Change Beneficiary** task on your home screen. Click it to view and then click **Let’s Get Started**.



5) The **Assign/Change Beneficiary** page will open for you to make the necessary updates. Click **Manage** for the insurance benefits you want to add/update a beneficiary.



a. On the **Basic Life and AD&D Employee** page, click **Confirm and Continue** to proceed.



b. You can now add **Primary** and/or **Secondary Beneficiaries** by clicking **+**.

**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 0 items ☰ ☐ ↗

+	Beneficiary	Percentage
No Data		

Secondary Beneficiaries 0 items ☰ ☐ ↗

+	Beneficiary	Percentage
No Data		

c. Click in the **Search** field and select as follows:

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 Be

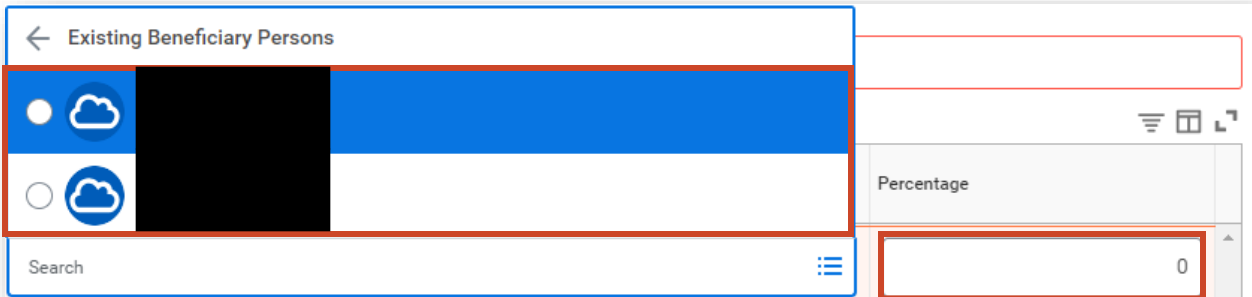
- Existing Beneficiary Persons >
- Existing Trusts >
- Add New Beneficiary or Trust
- Search ☰

+	Beneficiary	Percentage
No Data		

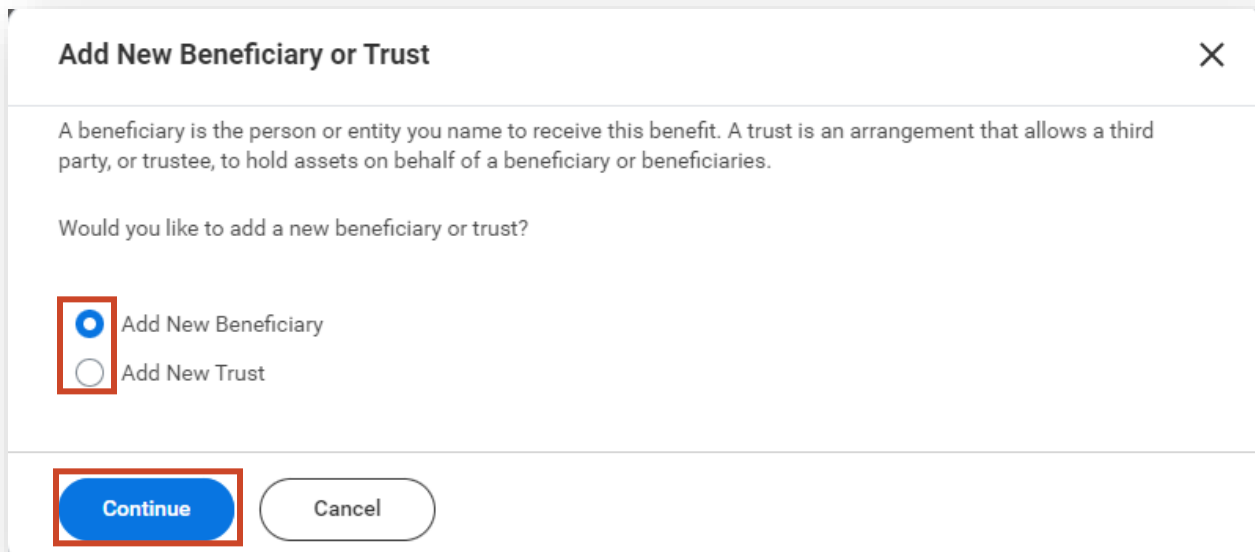
0

Save
Cancel

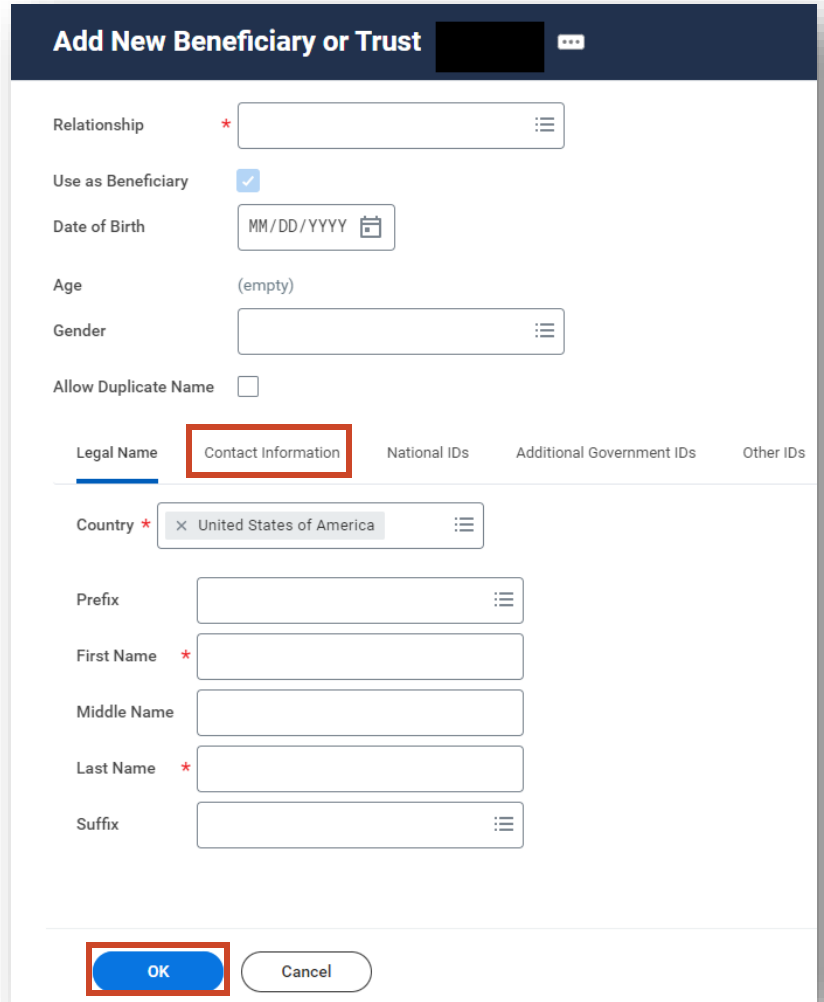
- Existing Beneficiary Persons:** Select this if you have added dependents or created beneficiaries in your beneficiary list. Select the individual(s) you want to add and select the percentage up to 100. Add multiple beneficiaries to assign total percentage to 100 or a **Secondary Beneficiary** following the same steps.



- Existing Trusts:** Select this if the trust is already entered in Workday. Select the trust(s) you want to add and select the percentage up to 100. Add multiple beneficiaries to assign total percentage to 100 or a **Secondary Beneficiary** following the same steps. Secondary beneficiaries are added in the event of a death or termination of the primary beneficiary assigned.
- Add New Beneficiary or Trust:** Select this to add a new beneficiary or trust in Workday. Select the appropriate radio button then click **Continue**.



- i. On the Add New Beneficiary or Trust page, enter all the red asterisk details. Select **Contact Information** to enter address details then click **OK**.



**Add New Beneficiary or Trust**

Relationship \*

Use as Beneficiary

Date of Birth

Age (empty)

Gender

Allow Duplicate Name

Legal Name  **Contact Information**  National IDs  Additional Government IDs  Other IDs

Country \*

Prefix

First Name \*

Middle Name

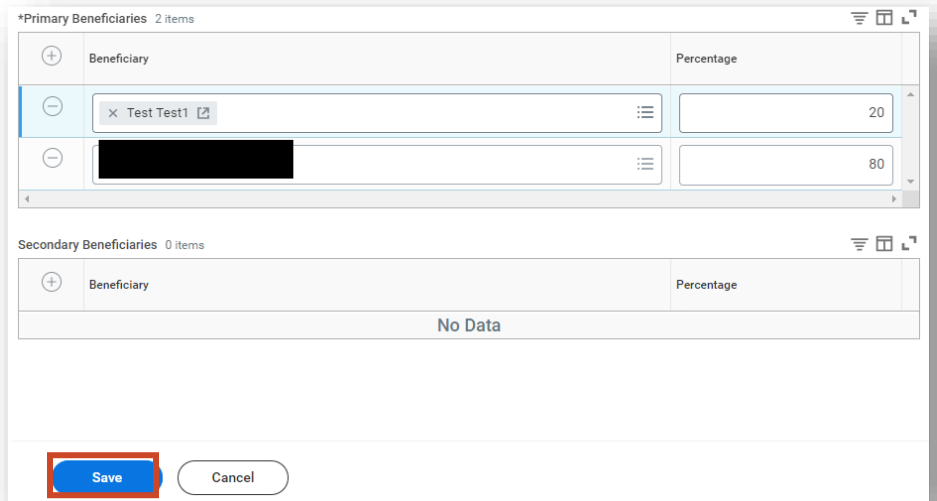
Last Name \*

Suffix

**OK** Cancel

- 6) Once you have added all beneficiaries and appropriate percentages, scroll down and click **Save**.

- 7) Repeat these steps for all other insurance plans you have enrolled in to manage your beneficiaries. **Reminder:** Workday houses insurance beneficiary information **ONLY**. To assign beneficiaries for retirement please do that in **Corebridge** or **PERA** according to the retirement plan(s) you have elected, both mandatory and voluntary retirement.



\*Primary Beneficiaries 2 items

Beneficiary	Percentage
<input type="text" value="x Test Test1"/>	<input type="text" value="20"/>
<input type="text" value="x [Redacted]"/>	<input type="text" value="80"/>

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

**Save** Cancel



- 8) Click **Review and Sign** to review the summary of your changes.
- 9) If everything looks accurate, check **I Accept** then click **Submit**.

- 10) You have submitted your elections and can click **View Benefits Statement** to view and print your records. Click **Done**.