

Introduction

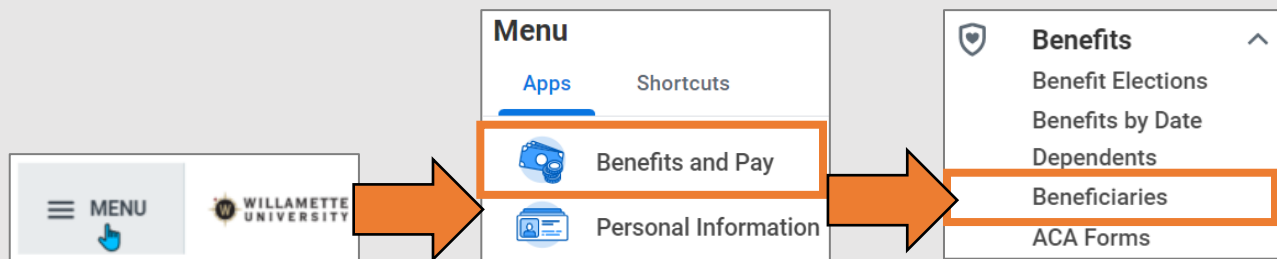
Beneficiaries are assigned to the following benefit plans in Workday:

- Basic Life
- Basic Accidental Death & Dismemberment
- Supplemental Life
- Supplemental Accidental Death & Dismemberment
- Fidelity 403(b) Retirement Contribution Plans

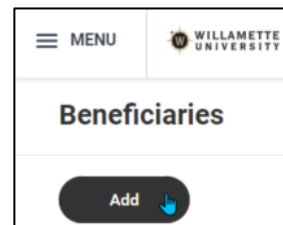
You should have beneficiaries assigned to each of the plans in which you are participating. To do so, you must first create the beneficiaries and then assign them to the benefit plans.

Creating a Beneficiary

1. Upon logging into Workday, click the **Menu** button in the upper left hand corner, then select **Benefits and Pay**. On the resulting screen, click **Benefits** from the left hand navigation, and then **Beneficiaries** from the submenu the results.

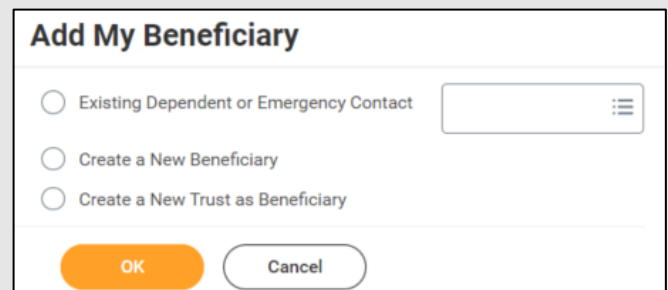


2. On the resulting screen, a list of existing beneficiaries entered will display. Click the **Add** button to create a new beneficiary.



3. You will be offered three choices to continue:

- If you had previously created a dependent for coverage or an emergency contact, you can select Existing Dependent or Emergency Contact and choosing the desired beneficiary from a drop down list;
- You can create a new beneficiary; or
- You can create a trust instead of a person to become your beneficiary.



The image shows a screenshot of the 'Add My Beneficiary' dialog box. It has a title bar with the text 'Add My Beneficiary'. Below the title, there are three radio button options: 'Existing Dependent or Emergency Contact', 'Create a New Beneficiary', and 'Create a New Trust as Beneficiary'. To the right of the first option is a dropdown menu icon. At the bottom of the dialog, there are two buttons: 'OK' (orange) and 'Cancel' (white with a grey border). A hand cursor is shown clicking the 'Add' button from the previous screen, which has triggered this dialog.

Make your selection and click **OK**.

- In the following example, we are proceeding by selecting **Create a New Beneficiary**. A similar process would be involved in creating a new trust. For that option you enter the name of the trust instead of an individual person.

After selecting **Create a New Beneficiary** and **OK**, you will be presented with a list of information to provide about your beneficiary. Click the edit pencil in each field to enter information.

You are only required to enter the beneficiary name and relationship to you, but we highly suggest entering as much information as possible, particularly contact information. The more information entered, the easier it will be for your beneficiary to make a claim. Gathering the information prior to creating the beneficiary will be helpful.

Beneficiary Personal Information

Legal Name

Legal Name *
(empty) ✎

Relationship

Relationship *
(empty) ✎

Date of Birth

Date of Birth
(empty) ✎

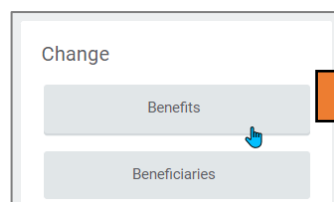
- When done, click Submit and move on to assigning your beneficiary to benefit plans.

Assigning a Beneficiary to a Benefit Plan

- Go back to the Workday home page, click **Menu** and then **Benefits** from the resulting drop down.



- Click **Benefits** under Change.
On the resulting screen select **Beneficiary Change** and enter the effective date.
Click **Submit**.



Change Benefits Mark Taylor ...

Change Reason * Beneficiary Change

- Birth / Adoption of Child
- Commuter Contribution Change
- Dependent Gains Coverage from another source
- Dependent Losses Coverage from another source
- Divorce / Dissolution of Domestic Partnership
- Marriage / Domestic Partnership
- Retirement Contribution Change

Benefit Event Date * 📅

Submit
Save for Later
Cancel

Adding a Beneficiary

3. A pop-up box will appear. Click **Open** to proceed adding beneficiaries to particular benefit plans.

You have submitted ✕

Up Next: Mark Taylor | Change Benefit Elections

[View Details](#)

Open

4. On the subsequent screen, click **Let's Get Started**. You will be presented with tiles representing each of the benefits you have chosen.

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Change Benefit Elections

Let's Get Started

5. In this example, we will add a beneficiary to the Voluntary 403(b) plan. Click Manage. On the following screen, you are presented with a summary of the benefit. To add a beneficiary, click **Confirm and Continue**.

Voluntary 403(b)
Fidelity (Pre-Tax)

Contribution

Manage

Voluntary 403(b)

Projected Total Cost Per Paycheck Projected Total Credits

Plans Available

2 items ☰ ☐ 🗨

*Selection	Benefit Plan Details	You Contribute (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Fidelity (Pre-Tax)	5%	
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Fidelity (Roth)		

Confirm and Continue
Cancel

6. Click the plus symbol under Primary Beneficiaries. Click the menu icon from within the name field, select Existing Beneficiary Persons, and then select the name of the beneficiary you wish to enter.

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	

Existing Beneficiary Persons >

Existing Trusts >

Add New Beneficiary or Trust

Search ☰

Existing Beneficiary Persons

Jennifer Taylor

Jeremy Taylor

Search ☰

Adding a Beneficiary


7. As desired, add more beneficiaries by clicking on the plus sign again and following the same process.

When done adding beneficiaries, place the percentage assigned to each in the corresponding box. Make sure the total adds up to 100.

Primary Beneficiaries 2 items

	Beneficiary	Percentage
+		
-	× Jennifer Taylor ...	50
-	× Jeremy Taylor...	50

8. You may also add one or more contingent beneficiaries following the same process as adding primary beneficiaries. Contingent beneficiaries are people selected in case the primary beneficiaries have also passed away at the time of your death.

9. When done, click the  button.

You will receive a confirmation the step is completed, and a prompt to add beneficiaries to other plans as desired.

Your Voluntary 403(b) changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

10. To finalize your selections, click  at the bottom of the benefits summary page.

11. You will be presented with a summary of your benefits, displaying your beneficiary choices for each. Scroll to the bottom of the page, review the agreement, check I Accept, and the **Submit** button.

I Accept



