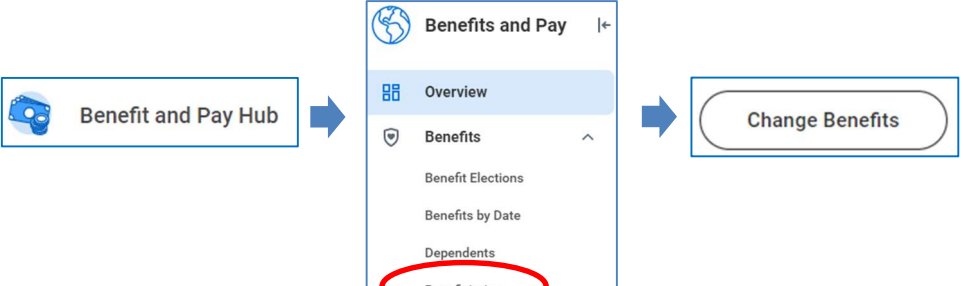
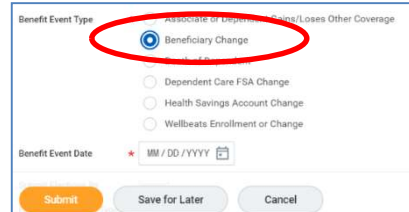
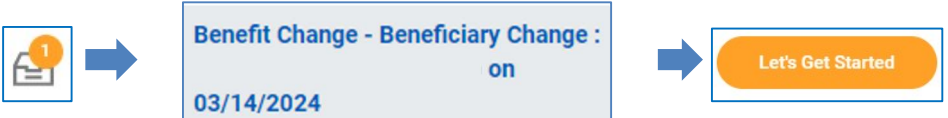
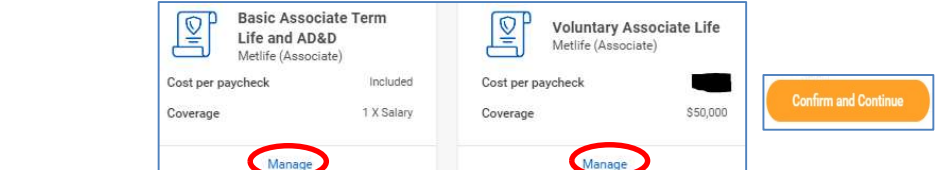
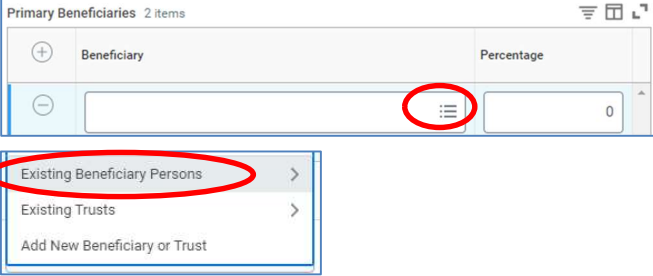
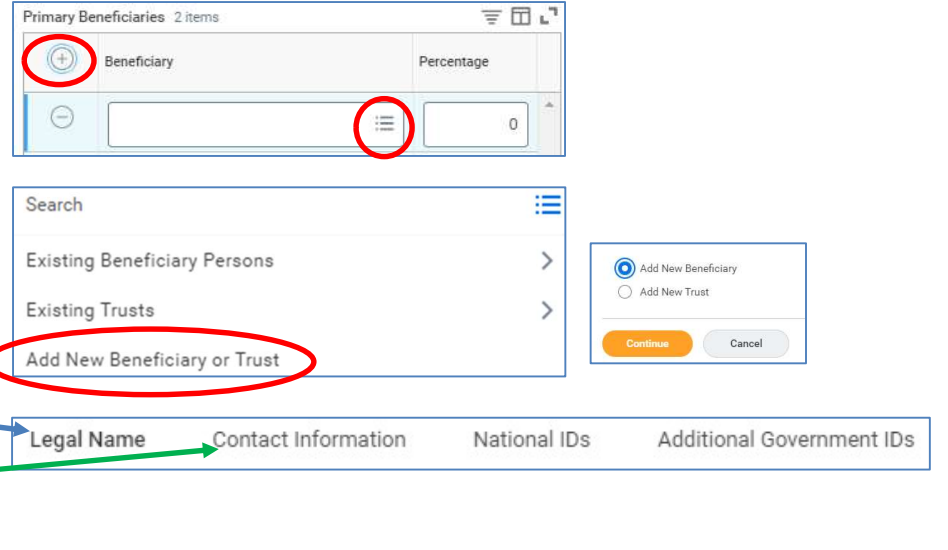
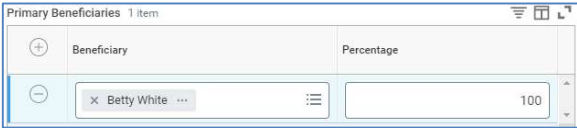
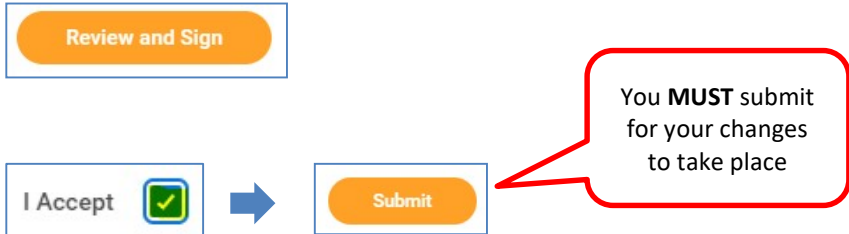


Title: Beneficiary Changes

Last Update Date: 03/14/2024

Beneficiary Changes	
<p>Add a new or update an existing beneficiary record:</p> <ul style="list-style-type: none"> - Click on Benefit and Pay Hub. - Under Benefits, click Beneficiaries. - Click Change Benefits button. 	
<p>Select Beneficiary Change for the Benefit Event Type.</p> <p>Enter today's date in the Benefit Event Date.</p> <p>Click Submit.</p>	
<p>A Benefit Change TO DO will appear in your Workday Inbox.</p> <p>Click Let's Get Started.</p>	
<p>Click Manage to begin your beneficiary change.</p> <p>Then click Confirm and Continue.</p>	
<p>To select an EXISTING Beneficiary</p> <p>Click on the ellipsis and select Existing Beneficiary Persons.</p> <p>Select a person from the list.</p> <p>Enter percentage %. If you have multiple primary beneficiaries, the total % needs to add up to 100%.</p>	
<p>To ADD a new beneficiary:</p> <p>Click the + button then click on the ellipsis.</p> <p>Select Add New Beneficiary or New Trust.</p> <p>The below fields are required when adding a Beneficiary:</p> <ul style="list-style-type: none"> • Choose Relationship from the dropdown list. <p>Legal Name Section</p> <ul style="list-style-type: none"> • First name and Last Name. <p>Contact Information Section</p> <ul style="list-style-type: none"> • Phone Number, Address, Email. 	

<p>This is what it would look like when you are finished.</p> <p>Click Save.</p> <p>If you have multiple primary beneficiaries, the total % needs to add up to 100%.</p>	 <p>A screenshot of a table titled "Primary Beneficiaries 1 Item". The table has two columns: "Beneficiary" and "Percentage". The "Beneficiary" column contains "x Betty White ..." and the "Percentage" column contains "100".</p>
<p>At the bottom of the page, click Review and Sign button.</p> <p>Review your changes. Scroll to the bottom of the page and check the box I Accept.</p> <p>Click Submit to complete your enrollment.</p>	 <p>A flowchart showing the final steps: an orange "Review and Sign" button, followed by a blue box containing "I Accept" and a green checkmark icon, with a blue arrow pointing to an orange "Submit" button. A red speech bubble points to the "Submit" button with the text "You MUST submit for your changes to take place".</p>

Important!

If you are enrolled in the **401(k)** or **HSA** accounts, you can assign your beneficiaries by logging into each of the vendor's websites. [Click here](#) to learn more.