To change beneficiaries

1. On the Workday dashboard, click on the Benefits worklet.
2. Click on Benefits under Change in the left column.
3. Under Benefit Event Type, select the first option: Beneficiaries Change and then enter the Benefit Event Date for the Beneficiary Change to take effect. Click on Submit.

4. Click on the Open button on the next screen so you can review.

5. A summary of your insurance plan dependencies and coverage is displayed. Click on Continue.

6. Read the detailed instructions on top of Step 2. Click on the + sign to add each beneficiary.

When you click on the Prompt icon, the categories for beneficiaries (e.g., persons, trusts) will drop down. Click on the appropriate category.
7. If you previously had entered persons as beneficiaries, their names will drop down and you can click on the person you wish to change. The primary percentage and the Contingent Percentage can be adjusted in this step. Click on Continue.

8. Step 3 will re-display the elected coverages and your beneficiaries.

9. Step 3 also requires an electronic signature. Read the legal notice and place a check mark in the I AGREE checkbox to make the beneficiary change final. Then click on the Submit button at the bottom of the page. You also can save the change for later or completely cancel it as well.