Instructions: Changing Beneficiaries in Workday

1. Click on “All About Me” in the top right corner of the screen.
2. Click on the Benefits worklet.
3. In the “Change” section, click on Benefits.
4. Using the arrow next to the box “Benefit Event Type,” scroll down until you find Beneficiary Change.
5. Enter the Benefit Event Date (today’s date).
6. Click the “Submit” button.
7. Click the “Open” button.
8. Click “Continue” through the steps until you see Beneficiary Designations.
9. At this point, you may edit your beneficiaries. You may add beneficiaries by clicking the “+” button or remove beneficiaries by clicking the “x” button. If your beneficiary is not listed, click “Create” and then “Add Beneficiary.”
10. Be sure to complete all of the fields for the beneficiary, including contact information and social security number.
11. Fill in the appropriate percentages for each beneficiary:
   - Primary Percentage – In the event of your death, your primary beneficiary(ies) receive the benefit. Primary beneficiary percentages must total 100%.
   - Contingent Percentage – In the event you and your primary beneficiary(ies) pass away at the same time, your contingent beneficiary(ies) receive the benefit. Contingent beneficiary percentages must total 100%.
12. Click the “Continue” button.
13. After reading the disclaimers, scroll down on the page, and check the “I Agree” box in order to continue.
14. Click the “Submit” button.