

# Job Aid: Beneficiary Change in Workday



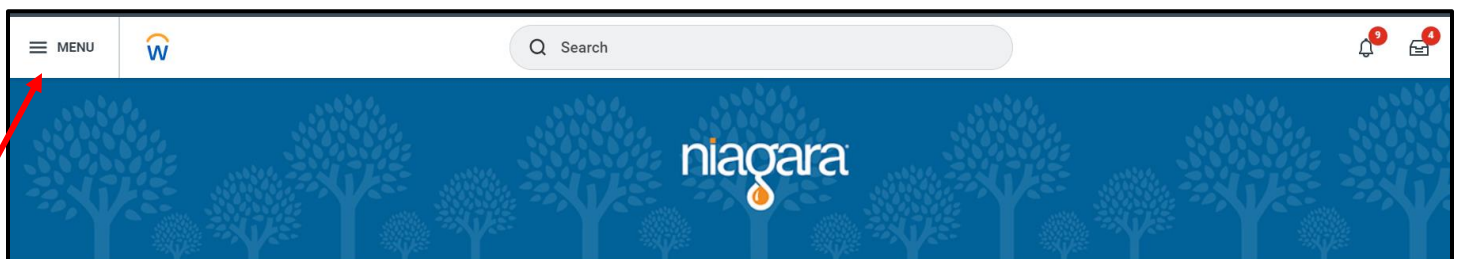
Document Name: Beneficiary Change in Workday		
Date Written: 4/5/2023	Written by: Victoria Jeon	Approved by:
Date Revised: 11/29/2023	Revised by: Yarixza Gonzalez	Approved by:

## Overview

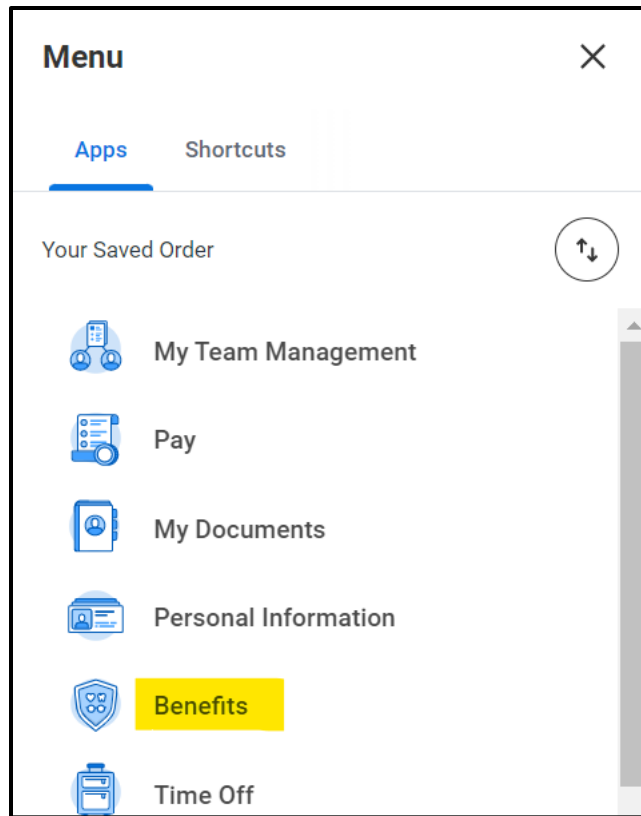
This job aid will walk you through the steps of changing your Beneficiary in Workday

## Procedure

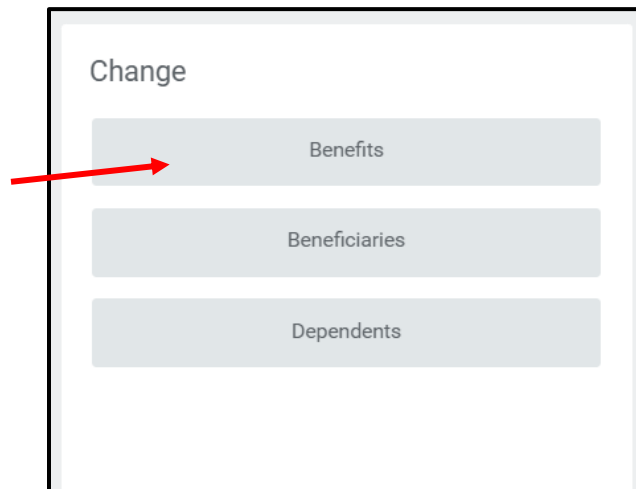
1. Login to Workday
2. Find the Menu dropdown on the left side



3. In the menu tab, find **Benefits**



4. Click **Benefits** under **Change**



5. Click the Drop down and select **Beneficiary Change**

The screenshot shows a web form with several fields. A dropdown menu is open for the 'Beneficiary Change' field, which is highlighted in yellow. A red arrow points to this dropdown. The dropdown list includes the following options: Birth / Adoption of Child, Commuter FSA Change, Electronic Document Consent, Employee Loses / Gains Coverage, Health Savings Change, Legal Marital Status Change OR Legal Domestic Partner Change, Medicare / Medicaid Change, Other Dependent Change, Spouse Loses / Gains Coverage, and Voluntary Benefit Change. Other fields visible include 'Benefit Event Type' (select one), 'Benefit Event Date' (select one), 'Submit Elections By', 'Enrollment Offering Types', and 'Attachments'.

6. Select a **date** you would like this to be effective and click **Submit** at the bottom of the page

The screenshot shows a web form with a calendar widget. The 'Change Reason' dropdown is set to 'Beneficiary Change'. The 'Benefit Event Date' field is highlighted in yellow and contains the text 'MM/DD/YYYY'. A calendar for April 2023 is displayed, with the date '5' circled in blue. The 'Submit Elections By' field is empty. A red arrow points to the 'Beneficiary Change' dropdown. Below the calendar is a text input field labeled 'enter your comment'.

7. This will launch the event in the system. To immediately make the change, select the **Open** button to access your Beneficiary enrollment

The screenshot shows a confirmation message box with a close button (X) in the top right corner. The message reads: 'You have submitted' followed by 'Up Next.' and '| Change Benefit Elections'. Below this is a blue link labeled 'View Details'. At the bottom of the message is a blue button labeled 'Open', which is highlighted with a red arrow.

8. Now you are in the section to make your beneficiary changes

Insurance

**Basic Life**  
Unum - with AD&D (1x Salary) (Employee)

Cost per paycheck Included

Coverage 1 X Salary

[Manage](#)

**Supplemental Employee Life and AD&D**  
Unum (Employee)

Cost per paycheck \$3.39

Coverage \$60,000

[Manage](#)

**Supplemental Spouse Life and AD&D**  
Waived

[Enroll](#)

**Supplemental Child Life and AD&D**  
Waived

[Enroll](#)

- a. Click the plus button to drop down a new section
- b. Click the 3 lines to add a new Beneficiary or add an existing dependent as a beneficiary
  - i. If you are adding a new person you will need to add all of their personal information
- c. Select the percentage you would like them to have.

### 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 1 item

	Beneficiary	Percentage
+		
-	×	100

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
+		
No Data		

9. Click the Minus button to remove any unwanted beneficiaries
10. Repeat steps 8 and 9 to all other insurances that need beneficiaries
  - a. *Please note that TM's can only have themselves as a Beneficiary for Spouse insurance coverage and Child insurance coverage*
11. Click **Review and Sign** at the bottom of the page
12. This is the review page, double check that everything under the **Beneficiaries** column looks correct

**Review your benefits carefully!**

Because your benefit deductions are withheld on a pre-tax basis, the IRS requires you remain in these plans for the duration of the Plan Year, unless you experience a qualifying life events. Life events like marriage, divorce, birth/adoption, dependents gain or lose coverage must be reported in Workday within **30 days of the event date**.

**\*\*\*CHECK YOUR MEDICAL PLAN ELECTION!\*\*\***

Are your family members covered as you expected? Select Go Back and correct before you submit!

Selected Benefits 2 Items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Basic Life	01/01/2023	01/01/2023	1 X Salary		[Redacted]	Included
Unum - with AD&D (1x Salary) (Employee)					[Redacted]	
Supplemental Employee Life and AD&D	01/01/2023	01/01/2023	\$60,000		[Redacted]	\$3.39
Unum (Employee)					[Redacted]	

13. Scroll to the bottom of the page and click the **“I Accept”** button

**Electronic Signature**

**Legal Notice: Please Read**

Your name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I Accept" checkbox, you are certifying that:

- You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from your earnings the amount of your premiums or other contributions (if any) for the benefit options elected above.
- You understand and acknowledge that under the Internal Revenue Code regulations rules, **you may not change your benefit elections during the calendar year unless you experience a qualified change in status**.
- If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance coverage, you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment, typically within **30 days** after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse and your dependents, provided you request enrollment within **30 days** after the marriage, birth or adoption.
- You understand that you will not pay income tax or FICA tax on medical, dental, vision, and Flexible Spending Account contributions. These benefits are paid through the Flexible Benefits Plan on a pre-tax basis.
- Company-provided life insurance that exceeds \$50,000 may be subject to imputed income.
- Each year, during the Open Enrollment period, you will have the option to change certain coverage, whether or not you have had a qualified change in status event during the calendar year.
- In accordance with HIPAA, you understand that if you enroll in a Medical plan, Niagara may disclose information to third parties in connection with plan administration, through executed enrollment forms, or in another manner which satisfies applicable law.
- You understand if you enroll in a Niagara medical plan, covered Team Members will be asked to voluntarily participate in the Hydrate Your Health 2.0 Wellness program. **Failure to complete wellness activities by stated deadlines will result in additional payroll contributions** through the Wellness Surcharge, beginning in April. Wellness Rewards are treated as taxable income upon redemption.

14. Click **Submit** to complete the process

