

This quick reference guide (QRG) provides details for employees who wish to enroll or make changes to Optional Life and/or Dependent Life Insurance. Beneficiaries should be added before enrolling in coverage.

Please note that a dependent/beneficiary should be added only once in Workday and can be edited later. Employees will be required to name at least one Primary Beneficiary for Basic Life Insurance, Optional Life Insurance and Accidental Death & Dismemberment Insurance. Beneficiaries and their information should be kept up to date as life events occur. If the beneficiary is a dependent already in Workday, you may edit the dependent to be used as a beneficiary.

You may add a person or a trust as beneficiary. Adding the beneficiary does not make updates to beneficiary designations on insurance plan enrollments and the employee must assign the Person/Trust as beneficiaries for the different Life Plans in a Life Event.

ADD A BENEFICIARY

1. From the Workday home page, click the **Benefits** application.
2. Click the **Beneficiaries** button under Change.
3. Click the **Add** button.
4. Select **Create a New Beneficiary** then click **OK**.
The *Add My Beneficiary personal information* screen appears.
5. Enter **Legal Name**, **Relationship**, and at least one **Contact Information** section.
6. Click **Submit**.

ADD A NEW TRUST AS BENEFICIARY

A trust is a fiduciary arrangement that allows a third party or trustee to hold assets on behalf of a beneficiary or beneficiaries.

1. From the Workday home page, click the **Benefits** application.
2. Click the **Beneficiaries** button under Change.
3. Click the **Add** button.
4. Select **Create a New Trust as Beneficiary** then click **OK**.
The *Beneficiary Trust information* screen appears.
5. Enter **Trust Name**, **Trust ID**, **Trust Date**, **Beneficiary Trustee Name** (first and last), and an **Address**.
6. Click **Submit**.

ENROLL/CHANGE EMPLOYEE AND/OR DEPENDENT LIFE INSURANCE

1. From the Workday home page, click the **Benefits** application.
2. Click the **Benefits** button under Change.
3. Select **Change Reason of Change Optional Employee and/or Dependent Life insurance election**.
4. Fill in the **Today's Date or Starting Pay Date** field.
5. Click **Submit**.
6. A pop up will display with "You have submitted". Click **Open**.
7. Click the **Let's Get Started** button.

Benefits: Enroll in Optional Employee and/or Dependent Life Insurance

Employee

8. To enroll or change coverage for Optional Employee Life, click **Enroll** or **Manage** on the Optional Employee Life tile. To enroll or change coverage for Optional Dependent Life, click **Enroll** or **Manage** on the Optional Dependent Life tile. Employees can enroll, change plans, or cancel.
9. Click **Select** for the plan you would like to enroll in.

*Selection	Benefit Plan
<input checked="" type="radio"/> Select <input type="radio"/> Waive	The Standard Employee Paid - Dependent(s) Life Insurance for UASYS (Benefit Coverage: \$10K, \$15K, \$20K Amounts) (Dependent)

10. Click **Confirm and Continue**.
11. In the **Coverage** field, select the desired coverage.
12. Select at least one Primary Beneficiary. Click the + icon.
13. In the Beneficiaries column, select either **Existing Beneficiaries Persons** or **Existing Trusts**, then select the person or trust.
14. Input a **Percentage** if adding more than one primary beneficiary.

*Primary Beneficiaries 1 item	
Beneficiary	Percentage
<input type="text"/>	<input type="text" value="0"/>

15. Add **Secondary Beneficiaries**, if applicable.
16. Click **Save**.

17. Click **Review and Sign** once all enrollments and changes are completed.
18. The summary page will display. Review the selections, click the checkmark next to **'I Accept'**, then click **Submit**.



Note: Employees that are newly eligible to enroll in Optional Employee or Dependent Life Insurance due to a qualifying event must contact their Benefits Partner to have their Evidence of Insurability approved in Workday and do not have to complete the Evidence of Insurability process due to the qualifying event. Employees making changes not due to a qualifying event will be subject to the Evidence of Insurability process.