

Adding a Beneficiary in Workday

- 1. Log into Workday
- 2. Choose the **My Compensation Hub** from your menu on the homescreen.



3. Under the "Benefits" heading, select "Benefits Elections" then Change Benefits

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		Benefit Elections		Change Benefits
		Benefits by Date		
		Dependents		
		Beneficiaries		

- 4. From the Benefit Event Type Drop Down select: Add / Change Beneficiary
- 5. Benefit Event date: enter today's date
- 6. Click Submit
- 7. Click Open
- 8. You will have the option to review your life insurance elections, click "Continue"
- 9. To add a beneficiary:
 - a. Click the plus sign next to the plan you would like to associate them with

Beneficiary Designations 1 item									
		Benefit Plan			*Beneficiary				
		Basic Life - Canada Salaried (Employee)		(+)					

b. Select the menu option and create \rightarrow add beneficiary

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	Beneficiary Persons	>	
	Trusts		
	Create		



- c. Complete the following information:
 - i. Relationship
 - ii. First & Last Name
 - iii. Under contact information, add an address or phone number
 - iv. Click OK
- d. Repeat this step for each beneficiary you would like to add
- e. Designate each beneficiary as either a primary or contingent beneficiary
- f. Allocate a percentage (if you have multiple primary beneficiaries, the total of all percentages combined must equal 100)
- g. Continue for additional coverages if required
- h. When complete, click Continue
- i. Review and select "I Agree" as your electronic signature
- j. Hit Submit
- k. If you are taken to a confirmation page your changes have been processed
- I. You can select **PRINT** to download a copy of your election for your records