

Welcome to Workday Self Service. Within Workday, you can manage your beneficiaries by adding, editing, and changing beneficiary allocation and information. This guide covers general information on how to add beneficiary information. If you have any questions please contact your Benefits Team.



Note: You will need social security numbers, date of birth, and addresses to make add or make modifications to your beneficiaries.

MANAGE BENEFICIARIES

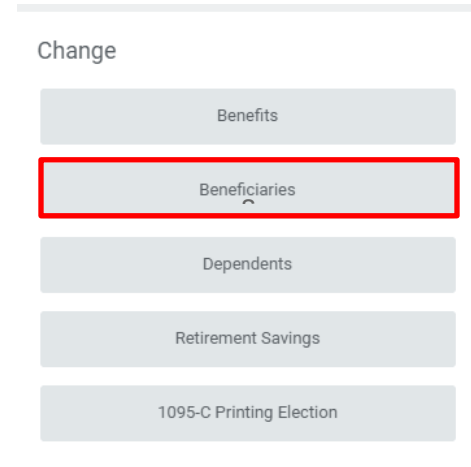
A beneficiary is a designated individual who would receive your Life Insurance Benefit. You can change, edit, and add beneficiaries from the Benefits application.



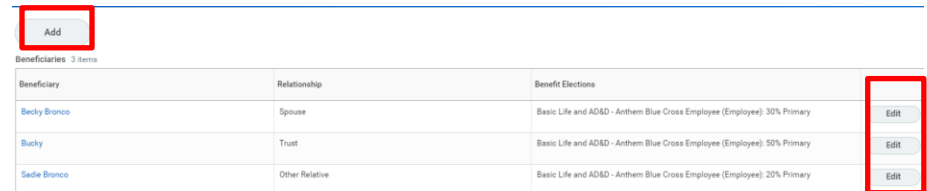
Note: If you are your assigning existing dependents or emergency contacts as beneficiaries, please go to Assigning Beneficiaries section on page 3

From the Benefits application:

1. Click the **Beneficiaries** button under **Change**.



2. View existing beneficiaries for enrollment in benefit plans or modify the existing information by clicking **Edit**. OR
3. Click **Add** to add a new beneficiary. The Add Beneficiary page displays.



5. Select **Existing Dependent or Emergency Contact, New Person as Beneficiary**, or **New Trust as Beneficiary**.

Add My Beneficiary

- Existing Dependent or Emergency Contact
- New Person as Beneficiary
- New Trust as Beneficiary

6. Click **OK**.

7. Enter all required information, denoted by an asterisk.

Beneficiary Personal Information

Legal Name

Legal Name *
Bronx Bronco



Relationship

Relationship *
Friend



Date of Birth

Date of Birth



Gender

Gender



8. Click **Submit**.

ASSIGNING BENEFICIARIES

Employees can view and update beneficiary assignment to Life Insurance(s).

From the Benefits application:

1. Click the **Benefits** button under Change.
2. Select **Beneficiary Change** for the **Benefit Event Type**.
3. Click the **Calendar** icon to enter the Benefit Event Date.



Change Reason * Beneficiary Change ▼

Benefit Event Date * 10/01/2020 


Submit Elections By 10/30/2020

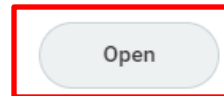
Benefits Offered Basic Life and AD&D
Voluntary Life Employee

4. Click **Submit**.
5. Open the **Change Benefit Election** event.



Up Next

 Bucky Senior Bronco
Change Benefit Elections

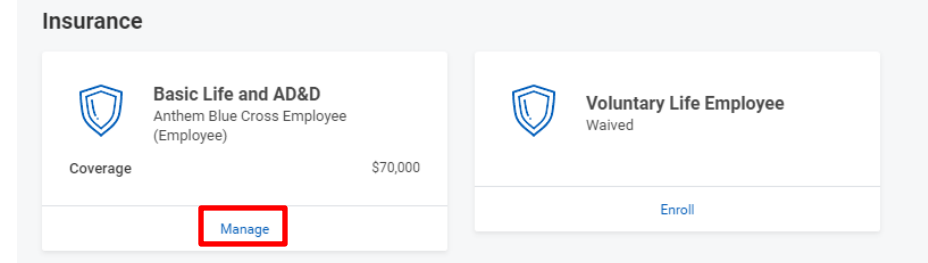


> **Details and Process**

6. Click **Let's Get Started**



7. All Life Insurance Plans that you are enrolled in/can enroll in will appear. Click **Manage** to add beneficiary.



8. Review the plan information. Click **Confirm and Continue**

Basic Life and AD&D

Plans Available

1 item

| *Selection | Benefit Plan | Company C |
|--|---------------------------------------|-----------|
| <input checked="" type="radio"/> Select <input type="radio"/> Waive | Anthem Blue Cross Employee (Employee) | \$6.13 |

Confirm and Continue

Cancel

9. Click **Add Icon** In Beneficiary column to add beneficiary.
10. Click the **Prompt Icon** and select **Beneficiary Persons** or **Trust** to see the list of Beneficiaries available.
11. Click the name of the person you want to assign and enter the Primary or Contingent Percentage for the beneficiary.
12. If adding more than one beneficiary to a plan, click the **Add Icon** to repeat the process. . If you are adding more than one

beneficiary, the total percentage must equal 100%.

Coverage

Coverage \$70,000

Calculated Coverage \$70,000.00

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 |
|---|---|--|
| 9 | 10 <input type="text" value="x Bucky Bronco ..."/> | 11 <input type="text" value="100"/> |

13. Click **Save** when done.
14. When all changes complete you will be brought to the main page with a confirmation message about actions taken. Either update other plans or if done click **Review and Submit**.

Beneficiary Change
Projected Total Cost Pe

✓

Your Basic Life and AD&D changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

✕

Insurance

Basic Life and AD&D
Anthem Blue Cross Employee
(Employee)

Coverage \$70,000

Manage

Voluntary Life Employee
Waived

Enroll

Review and Sign
Save for Later

I Agree

enter your comment

Process History

Bucky Bronco

Change Benefits for Life Event - Awaiting Action

Submit
Save for Later
Go Back
Cancel

Click **Submit**.

15. Review your benefit elections and beneficiaries. Check off the **I Agree** box to provide an electronic signature confirming your changes.

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 AGREE" checkbox, you are certifying that:

1. You understand that your benefit elections are legal and binding transactions.
2. You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

Kaiser Enrolled Employees

If you enrolled into SCU's Kaiser plan, this electronic signature acknowledges that you accept the rules and regulations of Kaiser California.

I Agree

Submit
Save for Later
Go Back
Cancel

16. Click **Submit**