# Workday | Manage Your Beneficiaries

***Workday User Guide***

**Intended Audience:** All Full-Time Employees

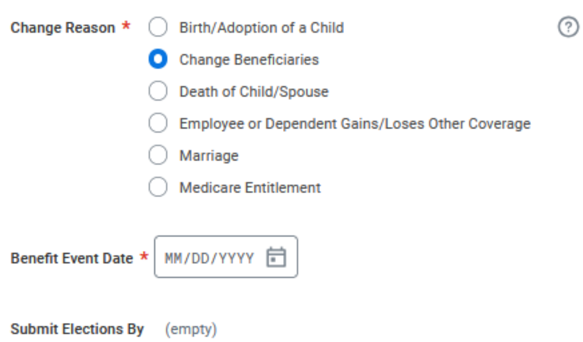
**Managing beneficiaries** is completed to add/update/remove beneficiaries for your life insurance benefits. Beneficiary information can be adjusted at any time following the steps outlined below.

## Manage Beneficiaries

A beneficiary is a designated individual who would receive your benefits in the event of your death. You can *change, edit, and add beneficiaries* from the **Benefits and Pay** application. Enter all required information, denoted by an asterisk (*).

**From the Menu, Select the Benefits and Pay HUB or select the task in your inbox and move to Let's Get Started:**

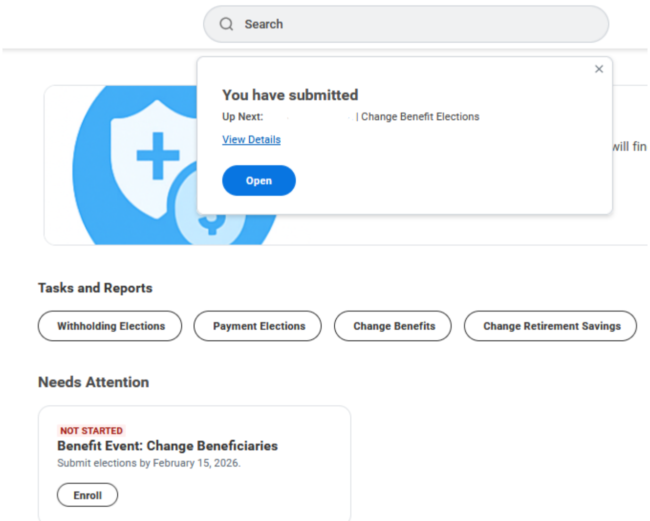
1. Select **Change Benefits** tab in the toolbar Navigation Pane under Tasks and Reports
2. On the **Change Benefits** screen, select **Change Beneficiaries**.




Follow the instructions listed – and add the Benefit Event Date. Add a comment in the comment box for the change requested. Click Submit.

Supporting documentation is not required for this change.

**3**. Click “**Open**” or Enroll to continue with your Change Beneficiary process:



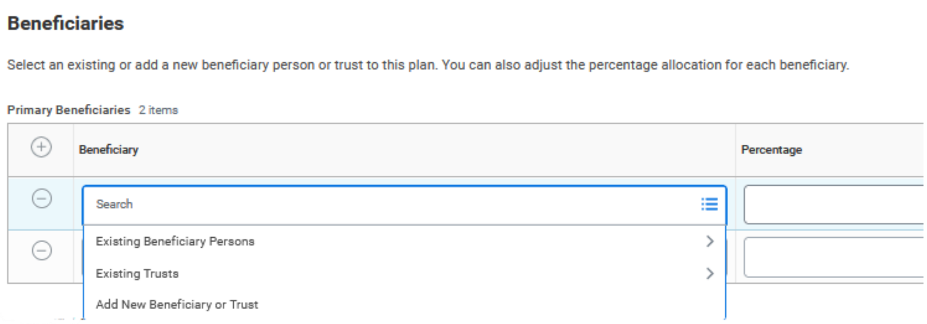

**4.** Click ‘**Let’s Get Started**’ to View and edit existing beneficiaries for enrollment benefit plans or modify information.

**5.** Click **Manage** to update beneficiary information for your selected insurance plan. *Note: Retirement plan beneficiaries must be updated directly with TIAA or Fidelity.*

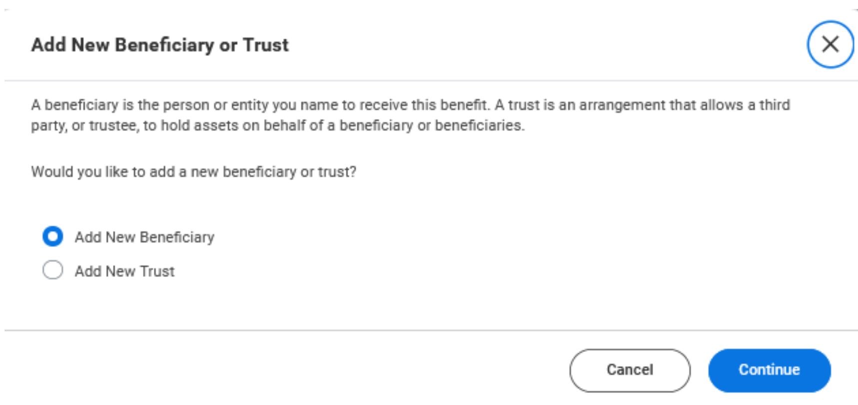
**6.** Select the desired Benefit Plan if there is more than one shown (i.e. *Reliance Standard insurance*) then click on **Confirm and Continue**.

**7.** The Coverage and Beneficiary page displays.

- **Adding** a Beneficiary: Select the **Add** (+) button to add a new beneficiary either under the Primary or Secondary Beneficiaries area
    - **a.** Click in the Search box to **select “Existing Beneficiary Persons”** – this will bring up a list of dependents already on your profile.
    - **b.** If you want to add a beneficiary who is not already listed as an existing dependent, then select “**Add New Beneficiary or Trust**”




c. Select **Add New Beneficiary** (or Trust) – then click **Continue**




i. Complete the required information (*) for the new beneficiary's **personal information** and on the tabs showing **Legal Name**, **Contact Information** on the tabs shown.

ii. Click OK

- **Remove** a beneficiary: select the **Minus/Remove** (-) button located beside the beneficiary name(s) listed.
- *Adjust the percentage if there is more than one beneficiary listed under primary or secondary, so that the total for the primary and the secondary areas each total 100%.*

8. Click **Save**.
9. Once you have updated all your beneficiary designations, you'll be redirected to the **Change Beneficiary** page.
10. Click **Review and Sign** at the bottom left corner of the page.

11. On the **View Summary** page you can see your selected beneficiaries, scroll down to check the box next to I Accept and select **Submit**.

**Support: Still have questions?**

For additional questions or support, please contact Human Resource Services at hrservices@dickinson.edu.

For technical support, please contact the Helpdesk at (717) 245-1000 or helpdesk@dickinson.edu.