




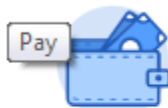




Beneficiary Designation The purpose of this guide is to help you navigate Workday to create or update your beneficiaries. You may launch a beneficiary change at any time in Workday.

WORKDAY TERMS AND SYMBOLS

●	Home Page:		This is the main landing page of Workday that houses all of the icons you will use to access Workday features such as Absence, Pay, Benefits and more.
●	Inbox:		Accessible on the left side of your Workday dashboard or in the top right corner of any Workday screen, this is where you will find all of your messages and task notifications.
●	Task:		An item that has been assigned to your Workday inbox for you to complete.
●	Prompt:		This is an icon that looks like a tiny bulleted list. You can click this button to expand it, and it will give you a list of options.
●	Plus:		You can use this symbol to add more line items, such as if you wanted to add multiple dependents or beneficiaries.
●	Minus:		Use this symbol to delete line items such as deleting beneficiaries.
●	Edit:		The pencil allows you to make edits to the assigned field.
●	Applications:		These are blue thumbnails on the Workday home page that represent Workday icon features like Time, Pay, Benefits, Personal Information and more.



Pay




Personal
Information





Benefits


BENEFICIARY INFORMATION


Beneficiaries listed in Workday are tied to the District–paid Basic Life, Basic AD&D and the Voluntary Life plans. To create or update your beneficiary in Workday, click on your Benefits icon on your home page.


**Applications**
6 items



Career


Pay


Personal Information


Benefits


Time


Time Off

Click Benefits icon to create or update your beneficiary.

CHANGE BENEFICIARY

On the left hand column under Change, choose Benefits.

Change

Benefits

Beneficiaries

Dependents

Retirement Savings

View

Benefit Elections

Benefit Elections as of Date

To change your beneficiary choose the benefit event

Enter the benefit event date (effective date of beneficiary designation)

As you complete your beneficiary change, be sure to click **Submit** when finished. The task will not be processed if Submit is not selected.

If you miss a field you will not be allowed to move forward.

Benefit Event Type *

- ☐ Birth / Legal Adoption
- ☒ Change Beneficiary
- ☐ Change Retirement Savings
- ☐ Death of Legal Dependent
- ☐ Divorce / Dissolution of Certified Domestic Partnership
- ☐ Gain of Outside Coverage
- ☐ Legal Guardianship
- ☐ Loss of Outside Coverage
- ☐ Marriage / Creation of Certified Domestic Partnership

Benefit Event Date * 03 / 01 / 2019

Submit Elections By 03/31/2019

Enrollment Offering Types

- Basic AD&D
- Basic Life
- Voluntary AD&D (EE)
- Voluntary AD&D (FAM)
- Voluntary Life (EE)

Attachments

Drop files here

or

Select files

Submit Save for Later Cancel

Click open to begin process

Change Benefit Elections

Due Date 03/22/2019

Open

> Details and Process

Event Date 03/01/2019

Initiated On 03/20/2019

Submit Elections By 03/31/2019

Beneficiary Designations 2 items

Benefit Plan	Requires Beneficiary	*Beneficiary	Beneficiaries
Basic AD&D - The Hartford (Employee)	<input type="checkbox"/>	+	percentage / Contingent Percentage
Basic Life - The Hartford (Employee)	<input type="checkbox"/>	+	

Click continue until you reach the Beneficiary Designation page. To add a beneficiary click on the add symbol

Beneficiary Designations 2 items

Benefit Plan	Requires Beneficiary	*Beneficiary	*Primary Percentage / Contingent Percentage
Basic AD&D - The Hartford (Employee)	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="radio"/> Primary Percentage <input type="text" value="0"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/>
Basic Life - The Hartford (Employee)	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="radio"/> Primary Percentage <input type="text" value="0"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/>

Click on prompt button to create your beneficiary

Event Date 03/01/2019
Initiated On 03/20/2019
Submit Elections By 03/31/2019

Beneficiary Designations 2 items

Benefit Plan	Requires Beneficiary	*Beneficiary	*Primary Percentage / Contingent Percentage
Basic AD&D - T	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="radio"/> Primary Percentage <input type="text" value="0"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/>

Follow the steps to choose existing "Beneficiary Persons" or create a new beneficiary.

Beneficiary Persons
Trusts
Create
Search

Event Date 03/01/2019
Initiated On 03/20/2019
Submit Elections By 03/31/2019

Beneficiary Designations 2 items

Benefit Plan	Requires Beneficiary	*Beneficiary	*Primary Percentage / Contingent Percentage
Basic AD&D - The Hartford (Employee)	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/> Jane Doe	<input checked="" type="radio"/> Primary Percentage <input type="text" value="100"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/>
Basic Life - The Hartford (Employee)	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/> X Jane Doe	<input checked="" type="radio"/> Primary Percentage <input type="text" value="100"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/>

Continue

To add more than one beneficiary, click on the add button

Choose if your beneficiary is Primary or Contingent and enter the percentage

Once you've created your beneficiary, click continue

Once you created or updated your beneficiaries, you will need to review and approve your changes. This will be the summary of your benefits. After you review your changes, read the legal notices required for your benefits, click on the "I agree" box, then click "Submit" when finished.

Click **Submit** when finished. The task will not be processed if Submit is not selected.

If you miss a field you will not be allowed to move forward.

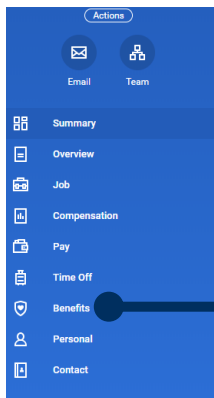
Submit

Save for Later

Go Back

Cancel

Your submission will be sent to Benefits Department for final review and approval. Once the benefits department approves your changes, you will be able to view your beneficiaries from your profile file page in Workday. Click your benefit tab below and you will see the benefits you are enrolled in as well as your designated beneficiaries:



"Benefits" tab

Benefits						
Benefits 8 items						
Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries
Medical - Kaiser HMO	12/01/2016	12/01/2016	Employee			
Dental - Delta PPO	12/01/2016	12/01/2016	Employee			
Vision - VSP PPO	12/01/2016	12/01/2016	Employee			
Basic Life - The Hartford (Employee)	12/01/2016	12/01/2016	\$50,000			Jane Doe
Basic AD&D - The Hartford (Employee)	12/01/2016	12/01/2016	\$50,000	\$50,000.00		Jane Doe

Designated beneficiary

Jane Doe

Benefits			
My Dependents			
My Beneficiaries			
Beneficiaries 1 item			
Beneficiary	Relationship	Benefit Elections	
Jane Doe	Spouse	Basic AD&D - The Hartford (Employee): 100% Primary Basic Life - The Hartford (Employee): 100% Primary	Edit

Click on "My Beneficiaries" to ensure that your beneficiaries are tied to the correct plan

Note: Beneficiary information for your pension plan or retirement savings plan is not saved in Workday. Those updates can only be made directly with the institution. Please contact CalPERS, CalSTRS, or your 403(b)/457(b) vendor directly to update your beneficiary information.