Updating Beneficiaries in Workday

42 Steps   [View most recent version](#) 🔗
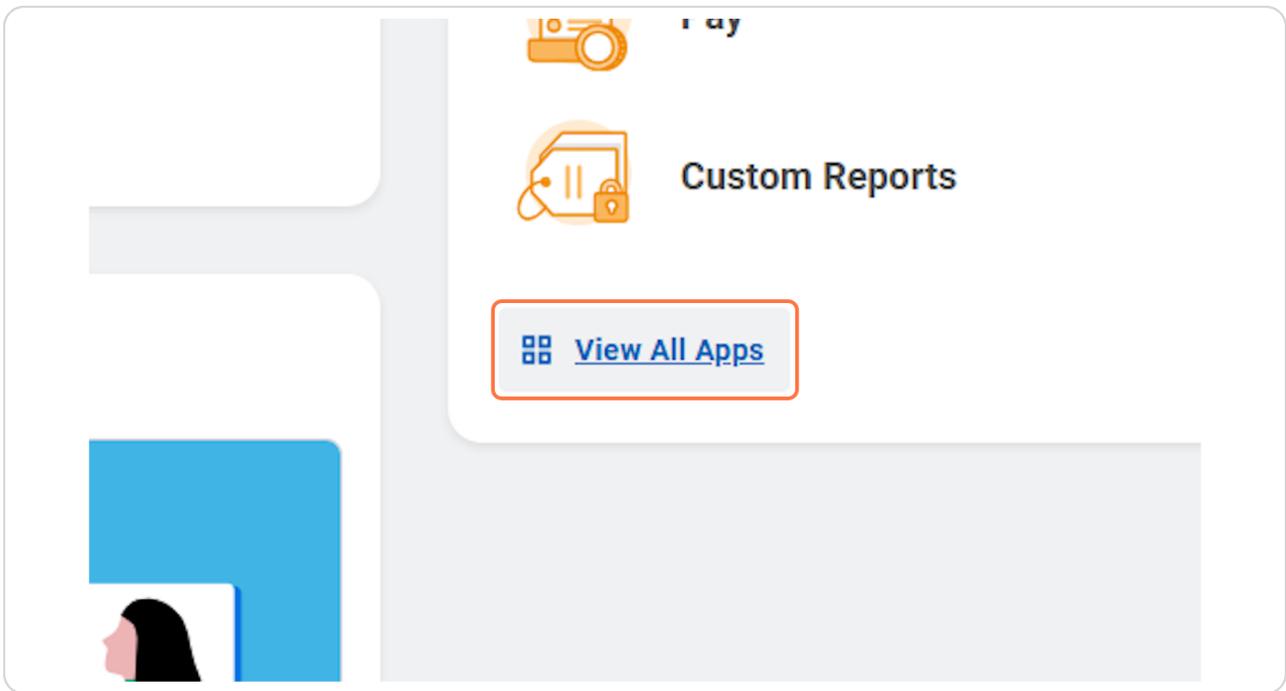

Created by	Creation Date	Last Updated
Alex Drabik	Nov 26, 2024	Mar 04, 2025

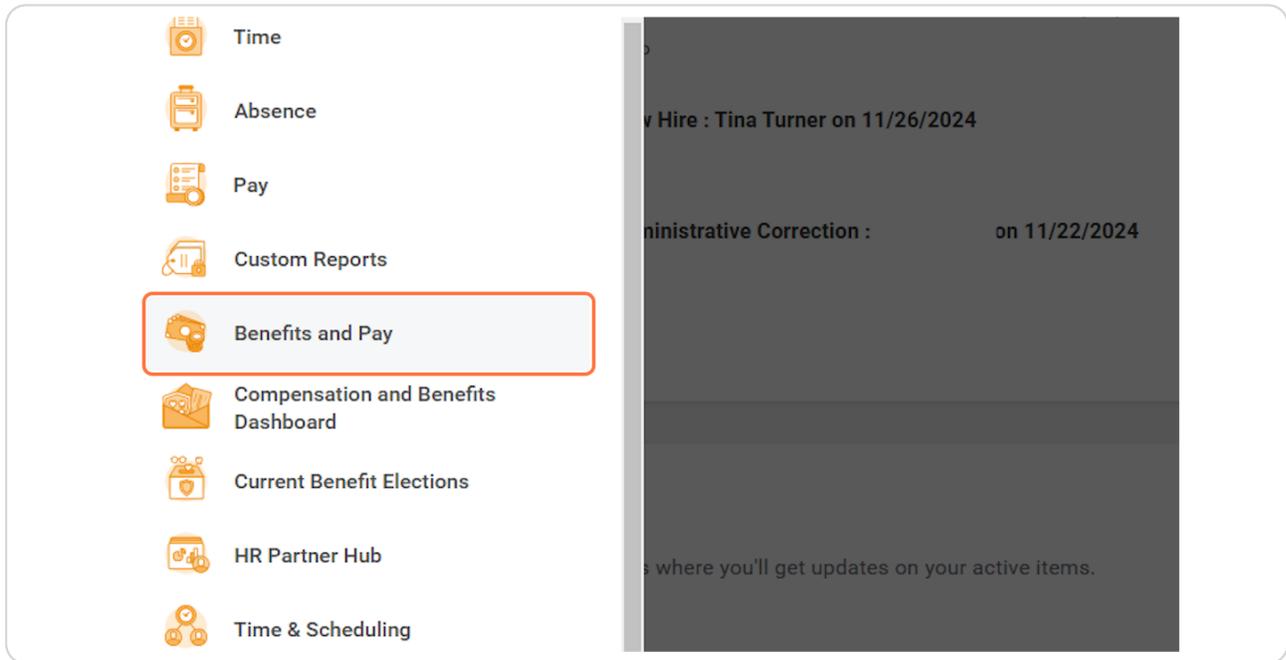# Log in To work you day account.

Opening the Event

10 Steps

STEP 1

Click on View All Apps if you don't already see the " Benefits and Pay" App

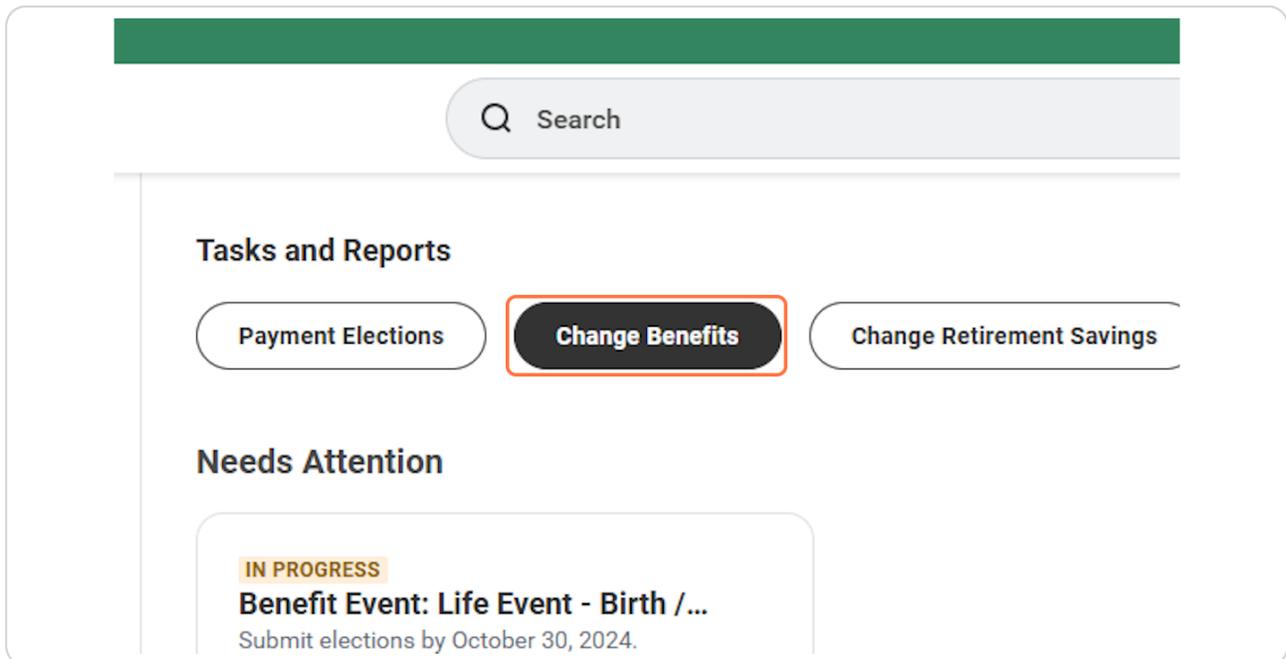## Click on Benefits and Pay

Click on Change Benefits

Click on Change Reason and select "Add/Update Beneficiary"

Change Benefits

Alexus Brandenburg

Change Reason *   select one   ▼

| select one |
| Add/Update Beneficiary |
| Cafeteria Plan Enrollment |
| HSA Enrollment |
| Life Event - Birth / Placement of Child |
| Life Event - Death of a Dependent |
| Life Event - Dependent Gain or loss of Medicare |
| Life Event - Divorce |

Click on Benefit Event Date and enter the date in which you'd like this change to be effective. Ex) date of birth of a new dependent or today's date

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Change Reason *   Add/Update Beneficiary ▼

Benefit Event Date *   MM/DD/YYYY 🗓
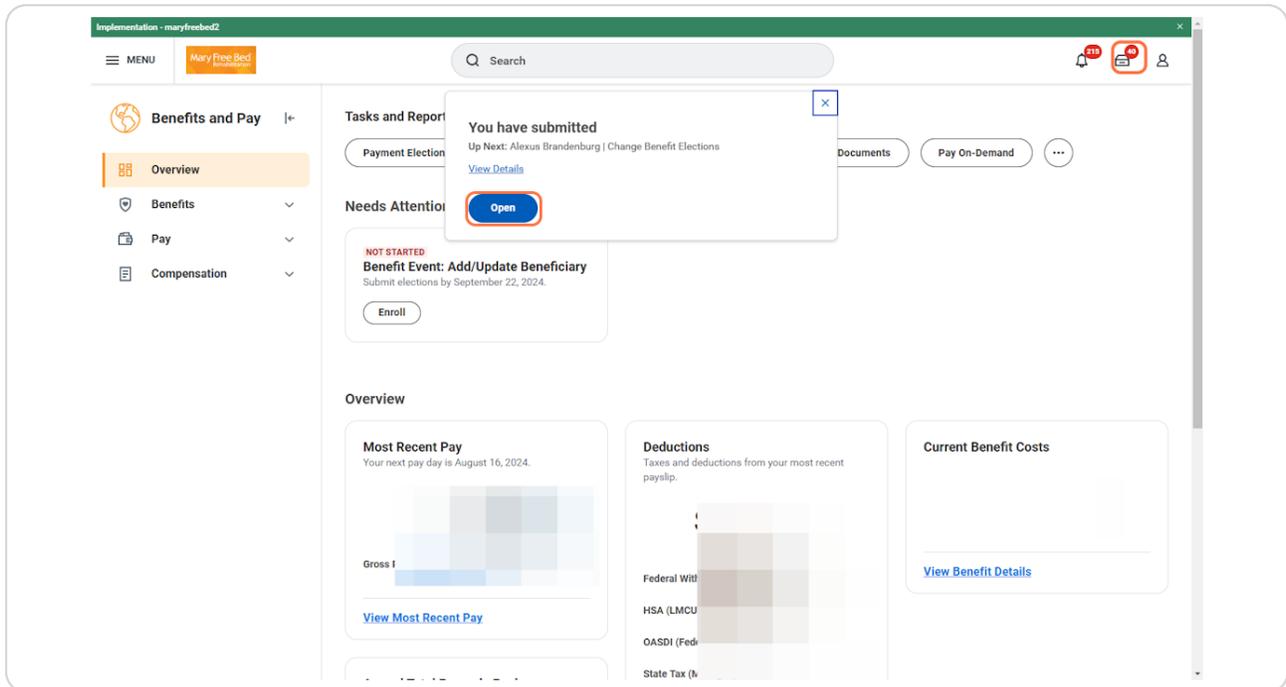
Submit Elections By   (empty)

Click on Submit

enter your comment

Submit   Save for Later   Cancel

STEP 7

A 'pop up' box will open, Click on 'Open' OR if you exit out of the pop up box, you can navigate to your Workday inbox, find your Change Benefits task and click 'Let's Get Started'

Click on Let's Get Started

IMPORTANT: When you are done with your elections, click the Review and Sign button to review

Initiated On   11/26/2024

Submit Elections By   09/22/2024

Let's Get Started

Click on Manage on the tile you'd like to add your beneficiary to. Note: you may add a beneficiary to any line of coverage meaning you may add a different beneficiaries to your basic lines vs your voluntary lines.

Cost per paycheck	$2.70
Coverage	$150,000

Manage

Cost per paycheck

Coverage

Manage

Voluntary Child Life
Waived

Volun
Waived

<u>Click on Confirm and Continue, as you are not eligible to change your amount of coverage unless you have a qualifying life event.</u>

Adding an Existing Beneficiary to a Plan 5 Steps

Click on the '+' to add a row for a new beneficiary.

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You ca
allocation for each beneficiary.

Primary Beneficiaries 0 items

⊕	Beneficiary
	No Data

Secondary Beneficiaries 0 items

⊕	Beneficiary

Click in the dialogue box under the Beneficiary column, this will bring up an up

Click in the dialogue box under the Beneficiary column, this will bring up an option to select an Existing Beneficiary Persons, Trust, or add a new Beneficiary/Trust.

For a current Beneficiary contact, Click on the radio button next to your contacts name. Note: if no contacts are available please follow the upcoming steps on adding a new beneficiary.

You may enter the percentage you wish to allocate to your primary beneficiary. Note: total percentages for primary beneficiaries must equal 100%

Adding a New Beneficiary contact to a plan   19 Steps

Click on "+" sign to Add a new Row to for adding a new beneficiary

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You ca
allocation for each beneficiary.

Primary Beneficiaries 1 item

⊕	Beneficiary
⊖	✕ Thomas Brandenburg •••

Secondary Beneficiaries 0 items

Click in the dialogue box under 'Beneficiary', click on "Add New Beneficiary or Trust" to create a brand new contact/Beneficiary

STEP 18

Click on Continue
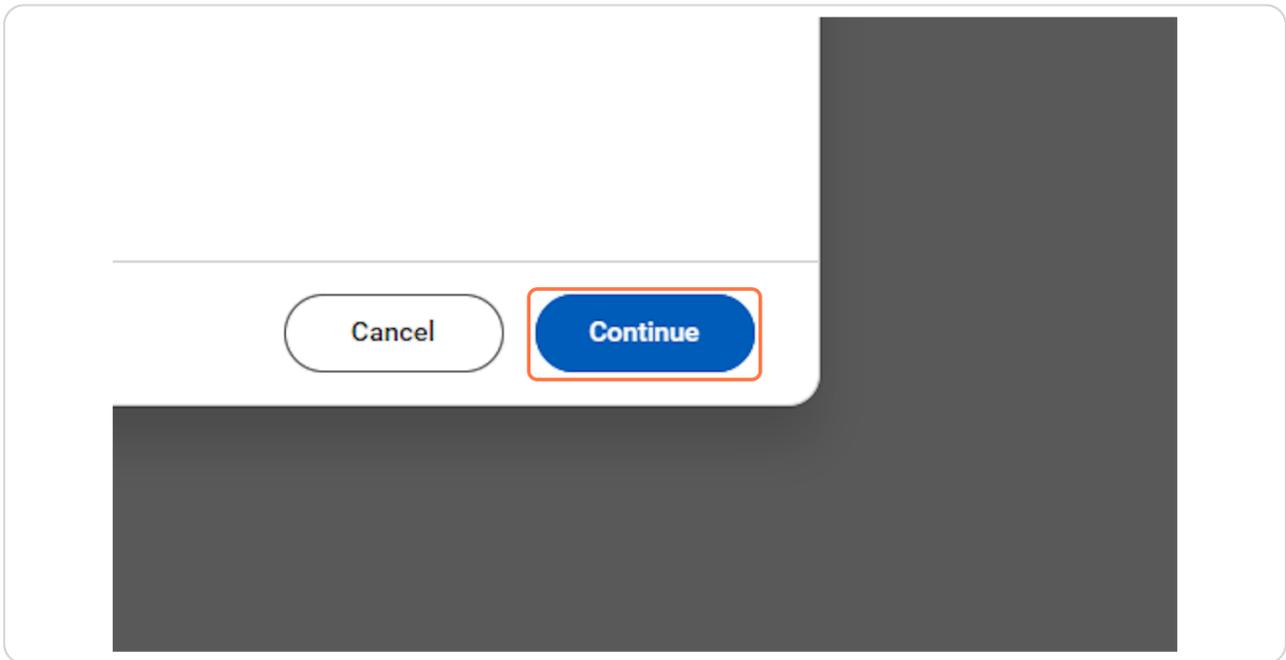
STEP 19

Select the appropriate Relationship from the 'Relationship' drop menu.

Enter the Beneficiary's Date of Birth

Enter the Beneficiary's Gender

Enter the Beneficiary's Legal first and last name (DO NOT CLICK OKAY YET)

Country *	✕ United States of America 🔗 ☰
Prefix	☰
First Name *	Gronkowski
Middle Name	
Last Name *	Brandenburg
Suffix	☰

OK   **Cancel**

DO NOT CLICK OKAY!

Click on the Contact Information Tab

Note: one form of contact information is required for a Beneficiary. HR recommends you include an address and phone number. Click on 'Add' under the appropriate contact type

Add

Address

Add

Email

Add

To use an existing address Click on Use Existing Address and select one of your saved addresses, or you may fill out the address information if you do not have an applicable existing address.

Phone

(Add)

Address

Use Existing Address	
Country	* ✕ United States of America ⧉
Address Line 1 *	
Address Line 2	
City *	

Ensure you select a 'Type' (Work or Home) for address/phone numbers/ emails under the 'Usage' section. NOTE: DO NOT CLICK OKAY YET

DO NOT CLICK OKAY

Click on National IDs, this is where you'll enter your beneficiary's social security number which is required for Beneficiary contacts.

0 years, 10 months, 25 days

× Male

icate Name

l Name   **Contact Information**   National IDs   Additional Government IDs   C

one

Add

Click on Add Row

Legal Name   Contact Information   **National IDs**   Additic

National IDs   0 items

⊕		*Country

Enter the appropriate country for the contact.

egal Name   Contact Informa   onal Government IDs   Othe

National IDs   1 item

⊕		*		*National ID Type
⊖			USA ☰	Search

Click on National ID Type, and typically you'll be selecting 'SSN', but you may use a TIN.

STEP 33

Enter the Social Security or TIN number.

STEP 34

Finally, you may now Click on OK

STEP 35

We now see multiple Beneficiaries, you may allocate percentages up to 100% total. You may also have 100% assigned as primary, and then add a secondary beneficiary with 100% following the similar process as above.

STEP 36

Once you have completed your percentage allocations you may Click on Save

STEP 37

<u>Note the pop up that your changes have been updated but not submitted.</u>

Click on Review and Sign

Manage

Manage

Voluntary Child Life
Waived

Voluntary Child A
Waived

Enroll

Enroll

Review and Sign

Save for Later

On the review page you can view Beneficiaries under the Beneficiaries column and Dependents under the Dependents column.

Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
01/01/2024	01/01/2024	1.5 X Multiples			Included
01/01/2024	01/01/2024	1.5 X Multiples			Included
01/01/2024	01/01/2024	60% of Salary			Included
01/01/2024	01/01/2024	60% of Salary			Included
01/01/2024	01/01/2024	$150,000		Gronkowski Brandenburg Thomas Brandenburg	$2.70
01/01/2024	01/01/2024	$400,000			$3.69
01/01/2024	01/01/2024	$100,000	Thomas Brandenburg		$3.32
01/01/2024	01/01/2024	$100,000	Thomas Brandenburg		$0.92

STEP 40

Click on I Accept...

Electronic Signature

Benefit Electronic Signature Text

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:

You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from your earnings the amount of your premiums or other contributions (if any) for the benefit options elected above.

You understand and acknowledge that under the Internal Revenue Code regulations rules, you may not change your benefit elections during the calendar year unless you experience a qualified change in status.

You understand that you will not pay income tax or FICA tax on my medical, dental, vision, and Flexible Spending Account contributions. These benefits are paid through the Flexible Benefits Plan on a pre-tax basis.

Company-provided life insurance that exceeds $50,000 may be subject to imputed income.

Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you have had a qualified change in status event during the calendar year.

If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance coverage, you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment within 30 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse and your dependents, provided you request enrollment within 30 days after the marriage, birth or adoption.

I Accept ☐

enter your comment

Process History

Alexus Brandenburg
Change Benefits for Life Event– Awaiting Action

Submit   Save for Later   Cancel

STEP 41

Click on Submit

enter your comment

Process History

Alexus Brandenburg
Change Benefits for Life Event– Awaiting Action

Submit   Save for Later   Cancel

STEP 42

If you have questions or run into any issues please contact benefits@maryfreebed.com