

Updating Beneficiaries in Workday

42 Steps [View most recent version](#) 

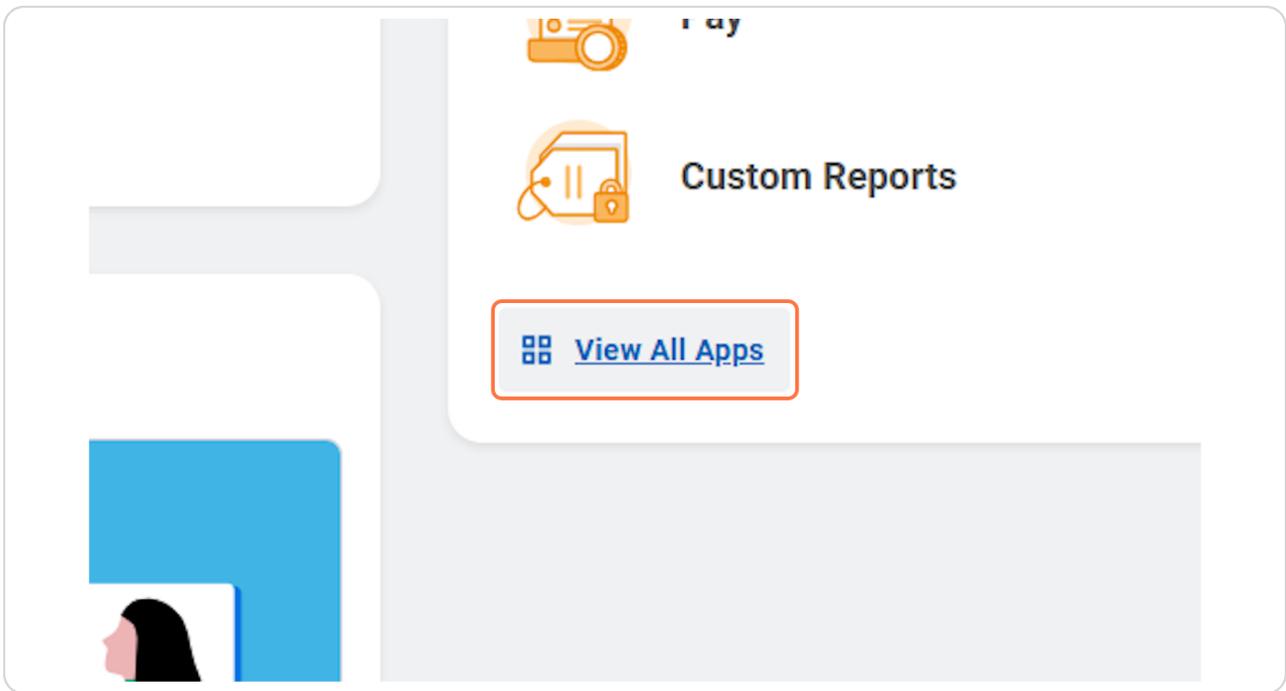
Created by	Creation Date	Last Updated
Alex Drabik	Nov 26, 2024	Mar 04, 2025

Opening the Event

10 Steps

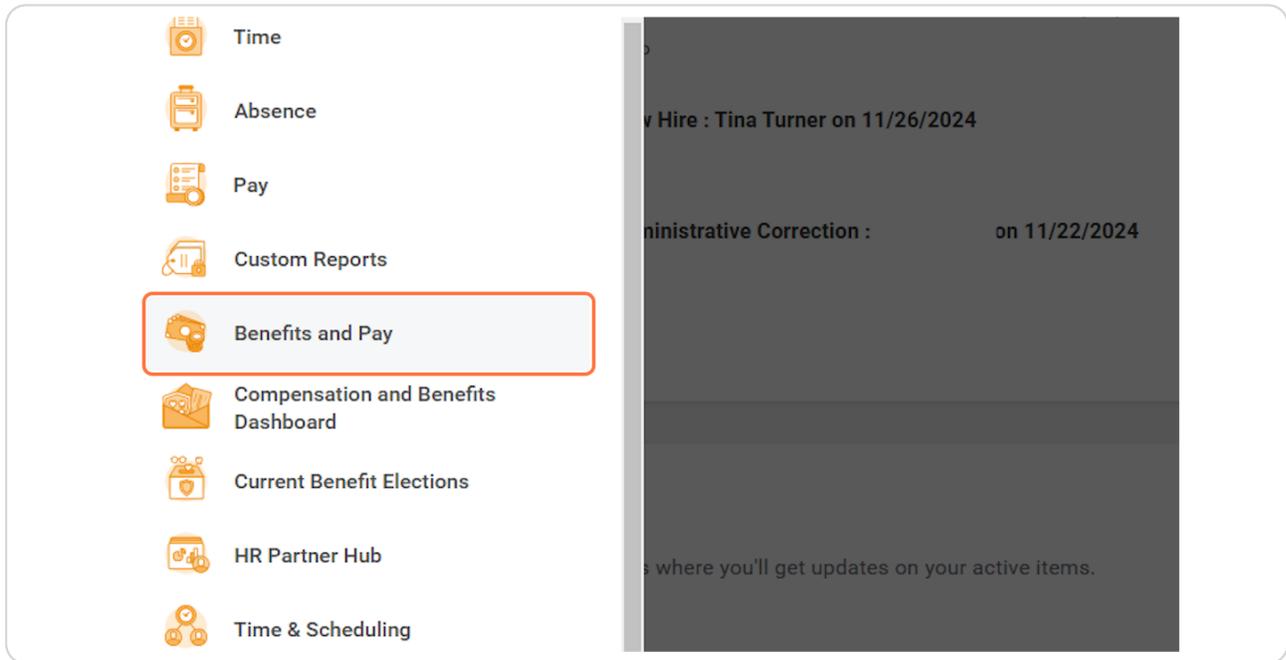
STEP 1

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



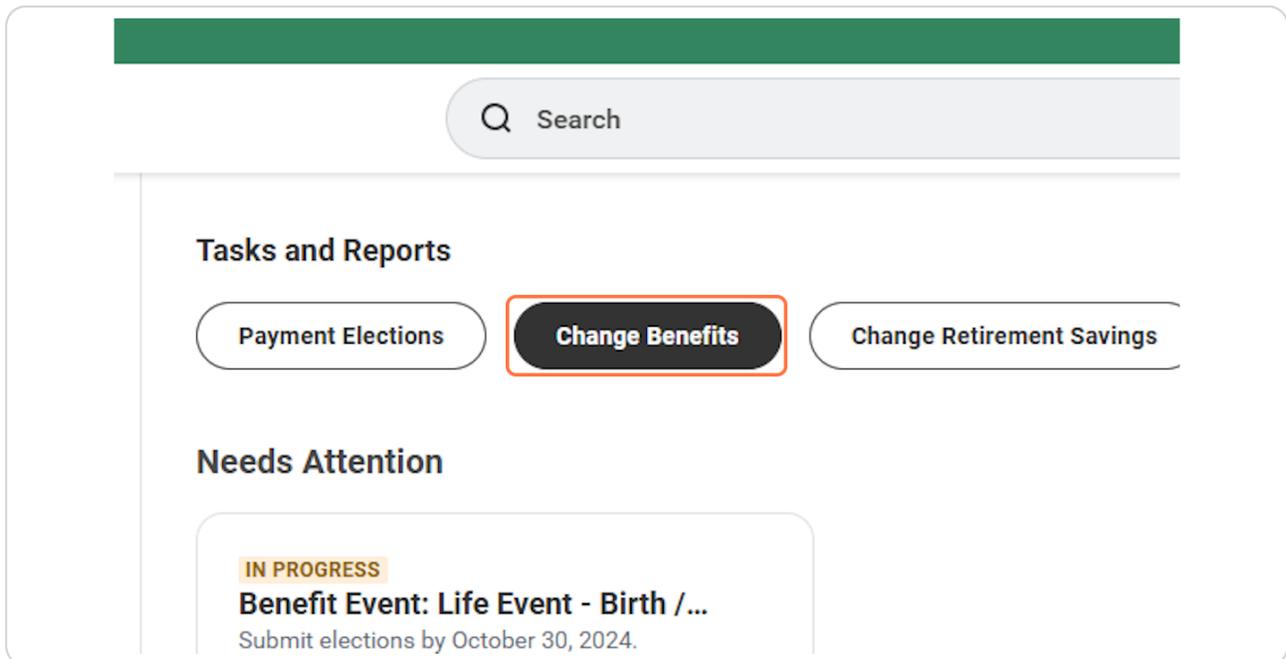
STEP 2

Click on Benefits and Pay



STEP 3

Click on Change Benefits



STEP 4

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

Change Benefits

Alexus Brandenburg

Change Reason *

- 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

STEP 5

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

Alexus Brandenburg

Change Reason * Add/Update Beneficiary ▼

Benefit Event Date * MM/DD/YYYY 

Submit Elections By (empty)

STEP 6

Click on Submit

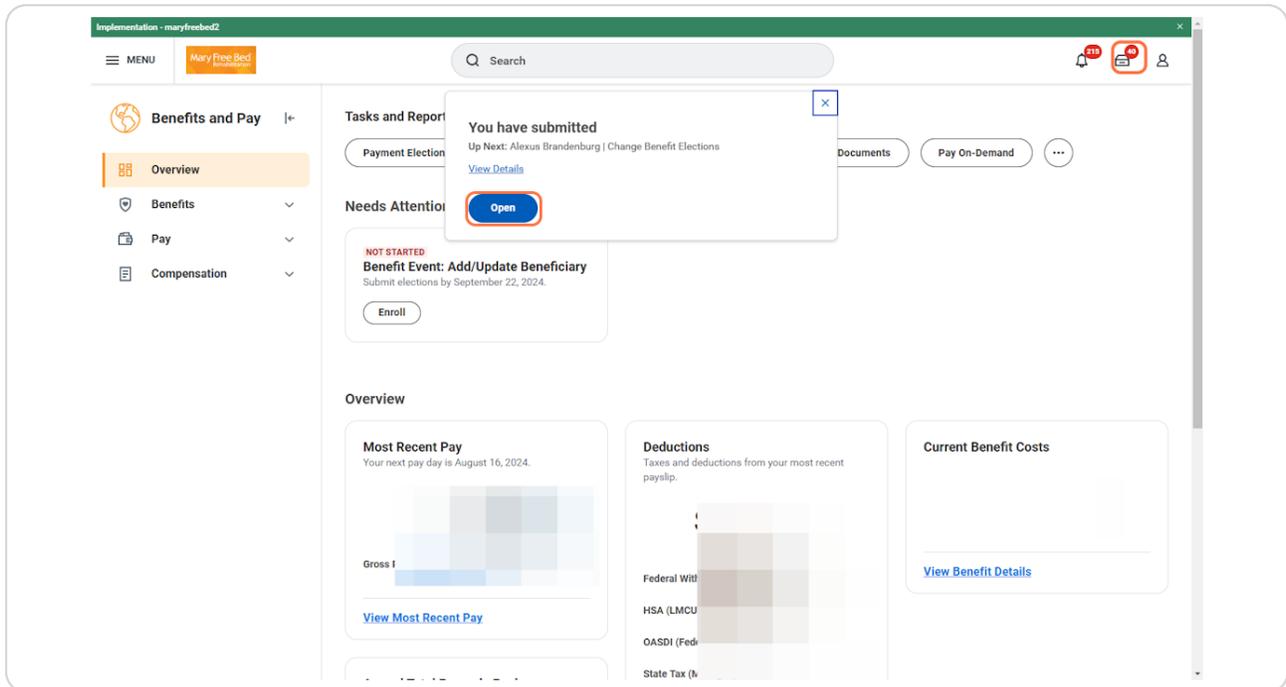
enter your comment



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'



STEP 9

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.

<p>Cost per paycheck \$2.70</p> <p>Coverage \$150,000</p> <p>Manage</p>	<p>Cost per paycheck</p> <p>Coverage</p> <p>Manage</p>
<p> Voluntary Child Life Waived</p>	<p> Volunt Waived</p>

STEP 10

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

The screenshot shows a form with a header "Unum (Employee)". Below the header, there are two radio button options: "Select" (which is selected) and "Waive". At the bottom of the form, there are two buttons: "Confirm and Continue" (highlighted with a red border) and "Cancel".

Adding an Existing Beneficiary to a Plan

5 Steps

STEP 11

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 can also specify an allocation for each beneficiary.

Primary Beneficiaries 0 items

	Beneficiary
No Data	

Secondary Beneficiaries 0 items

	Beneficiary
---	-------------

STEP 12

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

Plan cost per paycheck \$2.70

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
+		
-	<input type="text"/>	<input type="text" value="0"/>

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Save Cancel

STEP 13

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.

Calculated Coverage \$150,000.00

Coverage *

Plan cost per paycheck \$2.70

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

	Existing Beneficiary Persons	Existing Trusts	Add New Beneficiary or Trust	Search	Percentage
(+)					
(-)					0

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Insurance

Plan Description

Provider Website

STEP 14

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.

Coverage *

Plan cost per paycheck \$2.70

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 Beneficiary ← Existing Beneficiary Persons

	Beneficiary	Percentage
<input type="radio"/>	 [Redacted Name]	<input type="text" value="0"/>
<input type="radio"/>	[Redacted Name]	<input type="text" value="0"/>

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Insurance

Plan Description

Provider Website

STEP 15

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

son or trust to this plan. You can also adjust the percentage

Plan Description	Unum
Provider Website	Unum

Percentage
50

Percentage
No Data

Adding a New Beneficiary contact to a plan

19 Steps

STEP 16

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 can also specify an allocation for each beneficiary.

Primary Beneficiaries 1 item

	Beneficiary
	<input type="text" value="x Thomas Brandenburg"/> 

Secondary Beneficiaries 0 items

STEP 17

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

Coverage ✖ ☰

Plan cost per paycheck \$2.70

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.

Insurance

Plan Description

Provider Website

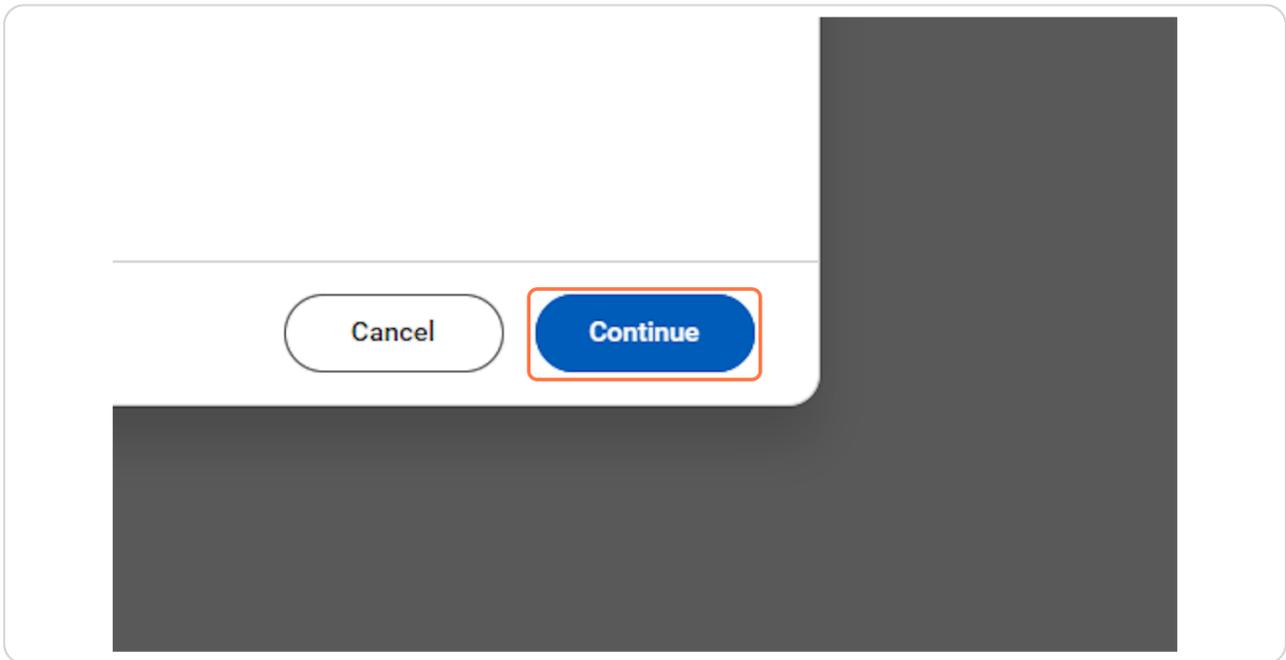
Primary Beneficiary	Percentage
<input type="text" value="Existing Beneficiary Persons"/> >	
<input type="text" value="Existing Trusts"/> >	
<input type="text" value="Add New Beneficiary or Trust"/>	<input type="text" value="0"/>
<input type="text" value="Search"/> ☰	
<input type="text" value="x Thomas Brandenburg"/> ☰	<input type="text" value="0"/>

Secondary Beneficiaries 0 items

Beneficiary	Percentage
<input type="text" value="Beneficiary"/>	

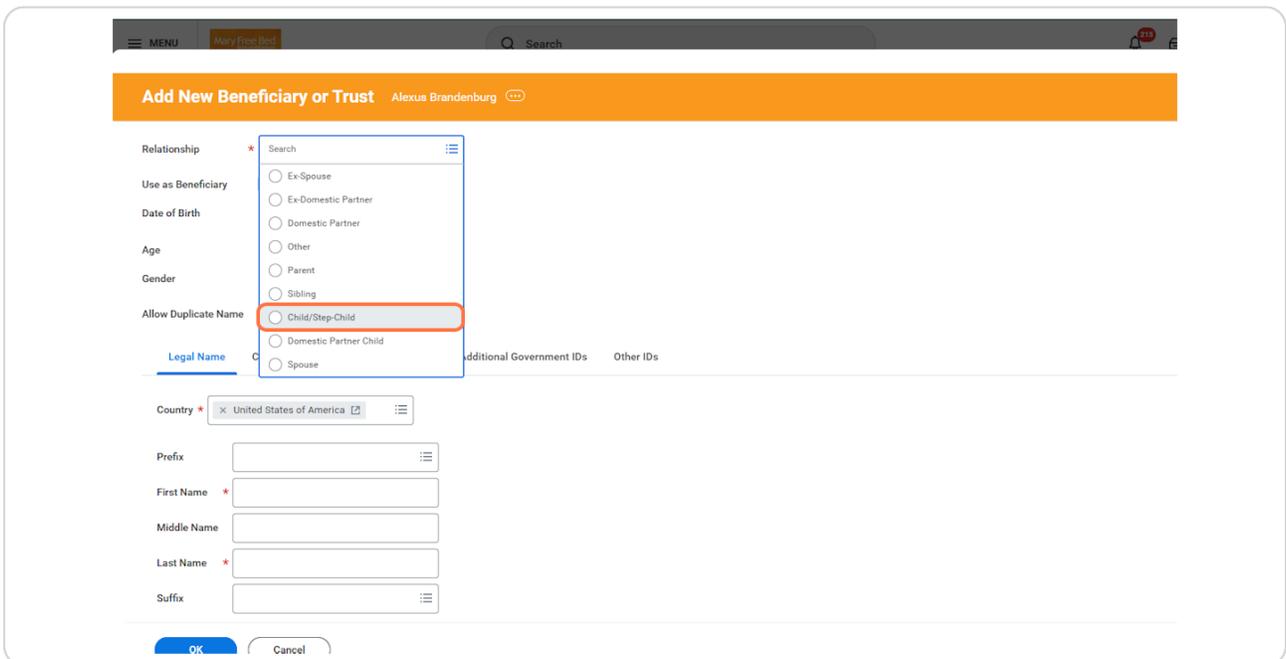
STEP 18

Click on Continue



STEP 19

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

A screenshot of a web form titled "Add New Beneficiary or Trust" for "Alexus Brandenburg". The form includes several fields: "Relationship" (with a dropdown menu open showing options like "Ex-Spouse", "Ex-Domestic Partner", "Domestic Partner", "Other", "Parent", "Sibling", "Child/Step-Child", "Domestic Partner Child", and "Spouse", where "Child/Step-Child" is highlighted with a red border), "Use as Beneficiary", "Date of Birth", "Age", "Gender", "Allow Duplicate Name", "Legal Name" (with sub-fields for Prefix, First Name, Middle Name, Last Name, and Suffix), and "Country" (set to "United States of America"). There are also fields for "Additional Government IDs" and "Other IDs". At the bottom, there are "OK" and "Cancel" buttons.

STEP 20

Enter the Beneficiary's Date of Birth

Add New Beneficiary of Trust Alexia Brandenburg

Relationship *

Use as Beneficiary

Date of Birth

Age (empty)

Gender

Allow Duplicate Name

STEP 21

Enter the Beneficiary's Gender

Relationship *

Use as Beneficiary

Date of Birth

Age (empty)

Gender

Allow Duplicate Name

[Legal Name](#) [Contact Information](#) [National IDs](#) [Additional Government IDs](#) [Other](#)

Country *

STEP 22

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

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

STEP 23

DO NOT CLICK OKAY!

STEP 24

Click on the Contact Information Tab

Age 0 years, 10 months, 25 days

Gender

Allow Duplicate Name

[Legal Name](#) **Contact Information** [National IDs](#) [Additional Government ID](#)

Country *

Prefix

First Name *

STEP 25

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

The image shows a form with three distinct sections, each separated by a horizontal line. The top section contains a single rounded rectangular button with the text "Add". The middle section is titled "Address" in bold text and contains a dark grey rounded rectangular button with the text "Add", which is highlighted by a red rectangular border. The bottom section is titled "Email" in bold text and contains a single rounded rectangular button with the text "Add".

STEP 26

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 *

Address Line 1 *

Address Line 2

City *

STEP 27

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

State	Michigan
Postal Code	49508
County	
Usage	
Type *	<input type="text" value="Search"/> 
Primary Work	<input type="checkbox"/> Home
Primary Home	<input type="checkbox"/> Work
Use For	(empty)
Visibility	<input type="checkbox"/> Public
Comments	<input type="text"/>

STEP 28

DO NOT CLICK OKAY

STEP 29

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

Indicate Name

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

one

STEP 30

Click on Add Row

Legal Name Contact Information **National IDs** Additio

National IDs 0 items

		*Country

STEP 31

Enter the appropriate country for the contact.

Legal Name Contact Informa **National IDs** onal Government IDs Othe

National IDs 1 item

			*National ID Type
		USA	<input type="text" value="Search"/>

STEP 32

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

ths, 25 days

tion **National IDs** Additional Government IDs Other IDs

Country

× United States of America

Social Security Number (SSN)

U.S. Individual Taxpayer Identification Number (ITIN)

Search

Current ID Add/Edit ID

STEP 33

Enter the Social Security or TIN number.

The screenshot shows a form with two tabs: "Current IDs" and "Other IDs". Below the tabs is a table with the following columns: "Type", "Current ID", "Add/Edit ID", "Issued Date", and "Expiration Date". The "Type" column contains a dropdown menu with "Security Number (SSN)" selected. The "Add/Edit ID" column contains a text input field with a red border and a placeholder "____-____-____". The "Issued Date" column contains a date input field with the format "MM/DD/YYYY" and a calendar icon. The "Expiration Date" column contains a date input field with the format "MM/DD/YYYY".

STEP 34

Finally, you may now Click on OK

The screenshot shows the bottom portion of the form. At the top, there are two tabs: "United States of America" and "Social Number". Below the tabs is a horizontal line. At the bottom of the form, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red border.

Allocating Beneficiary Percentages

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.

Calculated Coverage \$150,000.00

Coverage *

Plan cost per paycheck \$2.70

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 2 items

	Beneficiary	Percentage
<input type="checkbox"/>	<input type="text" value="Gronkowski Brandenburg"/>	<input type="text" value="0"/>
<input type="checkbox"/>	<input type="text" value="Thomas Brandenburg"/>	<input type="text" value="0"/>

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Insurance Instructions

Plan Description Unum

Provider Website Unum

STEP 36

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

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 2 items

Beneficiary	Percentage
<input type="text" value="Gronkowski Brandenburg"/>	<input type="text" value="50"/>
<input type="text" value="Thomas Brandenburg"/>	<input type="text" value="50"/>

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

STEP 37

Note the pop up that your changes have been updated but not submitted.

Your Voluntary Employee Life 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.

Basic AD&D
2 Plans

Included Prudential - (\$50,000) (Employee) Included

Included Unum - (\$50,000) (Employee) Included

[Manage](#)

Short Term Disability (STD)
2 Plans

Prudential (Employee) Included

Unum (Employee) Included

[Manage](#)

Volu Disa
Waive

[Enroll](#)

STEP 38

Click on Review and Sign

<hr/> Manage	<hr/> Manage
 Voluntary Child Life Waived	 Voluntary Child A Waived
<hr/> Enroll	<hr/> Enroll
Review and Sign	Save for Later

STEP 39

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	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**