Benefits: Adding a New Beneficiary

Within Workday, you can manage your beneficiaries by adding, editing, or removing a beneficiary, and viewing and editing your beneficiary elections. Please contact the benefits team at benefits@usfca.edu or dial (415) 422-2442 if you have further questions.

REPORT A BENEFICIARY CHANGE EVENT

If you need to add a beneficiary for any reason, initiate a Change Benefits event in Workday.

- You may edit your beneficiaries within the Beneficiary Change benefit event type or as an independent beneficiary change task (refer to Manage Beneficiaries below)
- If you are adding a new beneficiary, please provide pertinent contact details and personal information for the beneficiary.

From the Home Page:
1. Click the Benefits button on the home page.
2. Click the Beneficiaries button under Change.
3. Choose Beneficiary Change from the Reason list.
4. You will be asked to add beneficiaries.
5. Choose to create a new beneficiary or to create a new trust beneficiary.
6. Click OK.
7. Complete the necessary beneficiary information.
8. A Primary Address is required along with Legal Name and Relationship.

- Note: Beneficiaries will require Legal Name [First and Last], Relationship, Country, and Contact Information [address], to complete a beneficiary designation in Workday.
- Note: Trust Beneficiary Designations will require Trust Name, Trustee Name [First and Last]. Additionally, Trust ID, Trust Date, and Contact Information [address and phone number] for Trustee may be provided for ease of administration.
Benefits: Adding a New Beneficiary

9. Click Submit.
10. You will receive a submission confirmation. Click on the To Do button.

11. Click Change Benefits to add your beneficiary.

12. Choose Beneficiary Change

13. Enter the Benefit Event Date (enter today’s date).

14. Once the date is entered the policies requiring a beneficiary will be shown.

15. Click the Submit button on the bottom of the page. You will then receive another submission confirmation. Click Open.


17. The Beneficiary Change page will appear.

18. All Insurance policies in which you are enrolled will appear. Click Manage on an insurance policy to add/update beneficiaries.
Benefits: Adding a New Beneficiary

- **Note:** Each policy you hold will need to be updated separately.

19. Details of the selected plan will populate. No changes to enrollment can be made except during annual open enrollment.

20. Click **Confirm and Continue** to access the beneficiary page.

21. Click the **plus sign (+)** to add a beneficiary.

22. Choose **Existing Beneficiary Persons** from the dropdown menu.

23. The beneficiary you created earlier will appear. Click on the name.
Benefits: Adding a New Beneficiary

24. Enter Allocations for Primary and/or Secondary Beneficiary. Type Primary and/or Secondary Percentage in for each beneficiary.

Note: Percentages MUST total 100%. You may also add additional beneficiaries to whom you may allocate Secondary Percentage totaling 100%. You may NOT designate the same beneficiary more than once within a single benefit plan.
25. Click **Save**. You will receive a pop up message.

![Your Basic Life & AD&D changes have been updated, but not submitted](image)

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

26. Click **Review and Sign**.

![Review and Sign](image)

27. Review your beneficiary designations.

![Beneficiary Designations](image)

28. Complete electronic signature “I Agree” check box

![Electronic Signature](image)

29. Click **Submit**.

30. Click **Done** on the following page.

31. Your submission is automatically routed to your HR Benefits partner who will then approve your request. You will receive confirmation of the approval in your Workday inbox.