Benefits: Tagging an Existing 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.

TAGGING AN EXISTING BENEFICIARY TO A PLAN

This job aid shows how to tag an existing beneficiary to a plan. If you are unsure whether you have already tagged all your beneficiaries, follow the below steps.

From the Home Page:
1. Click the Benefits button on the home page.

2. Click the Benefits button under Change.

3. Choose Beneficiary Change from the Reason list.

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

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

6. Click Submit.

7. You will receive a submission message. Click Open.

8. Click Get Started.

9. Details of the selected plan(s) will populate. No changes to enrollment can be made except during annual open enrollment.
Benefits: Tagging an Existing Beneficiary

10. All Insurance policies in which you are enrolled will appear. Click Manage on an insurance policy to add/update beneficiaries.

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

11. On the next page, click Confirm and Continue.

12. Existing TAGGED beneficiaries will be shown in the Beneficiaries section.

13. Click the plus sign (+) to tag an existing beneficiary.

14. The beneficiary you created earlier will appear. Click on the name.

15. 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.

16. Click Save. You will receive a pop up message.

17. Click Review and Sign.
Benefits: Tagging an Existing Beneficiary

18. Review your beneficiary designations.

19. Complete electronic signature “I Agree” check box

20. Click Submit.

21. Click Done on the following page.

22. IMPORTANT: YOU MUST REPEAT THIS PROCESS FOR EACH INSURANCE POLICY YOU HOLD

23. 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.