Within Workday, you can manage your beneficiaries by adding, editing, or removing a beneficiary then reporting a beneficiary change event and viewing and editing your beneficiary elections. Please contact USF HR or Benefits Representative if you have further questions at benefits@usfca.edu or dial (415) 422-2442.

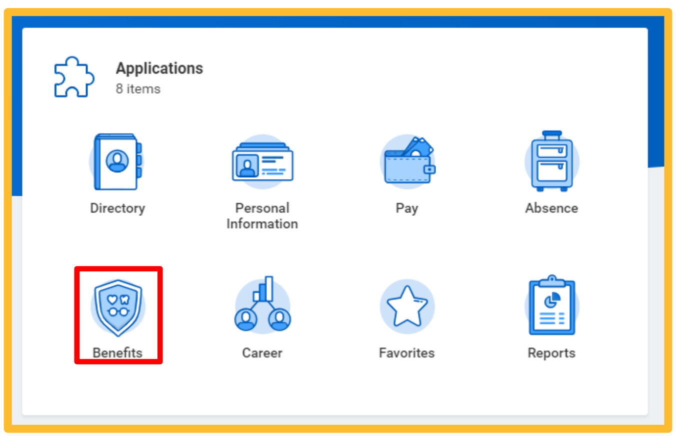
REPORT A BENEFICIARY CHANGE EVENT

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

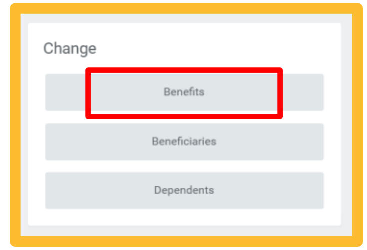
- You may edit your beneficiaries within the Beneficiary Change benefit event type or as an independent beneficiary change task (refer to Manage Beneficiaries below)
- If you are adding a new beneficiary, please provide pertinent contact details and personal information for the beneficiary.

From the Home Page: (Option 1)

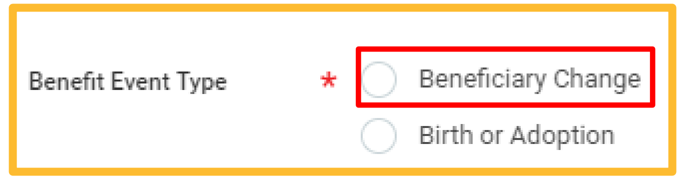
1. Click the **Benefits** button under **Applications**.



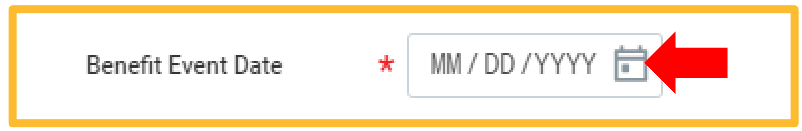
2. Click the **Benefits** button under **Change**.



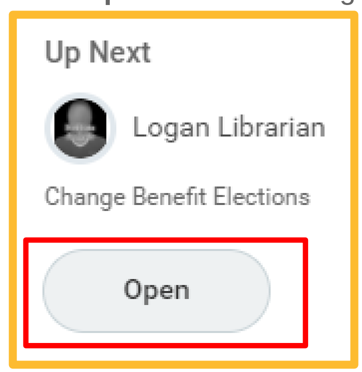
3. Select the **Benefit Event Type** [Beneficiary Change]



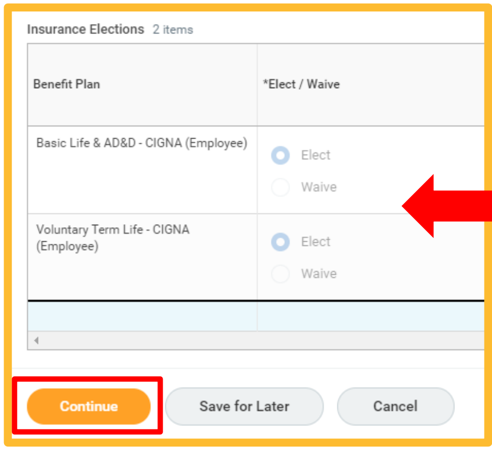
4. Click the **Calendar** icon to enter the date of the Benefit event.



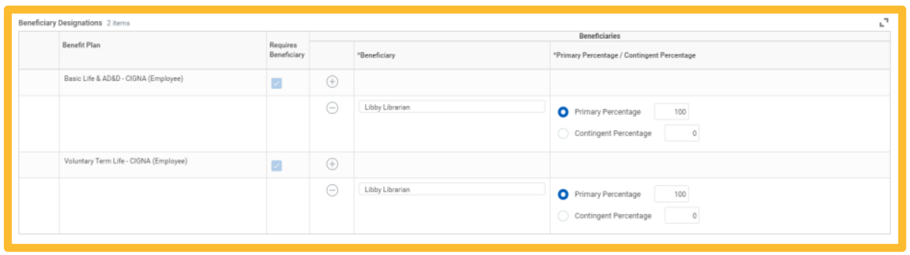
5. Click **Submit**.
6. Click **Open** to make changes to the available benefit elections.



7. Click **Continue** to modify beneficiaries and/or beneficiary allocations.
   Note: *Your Insurance Elections appear but are NOT editable.*



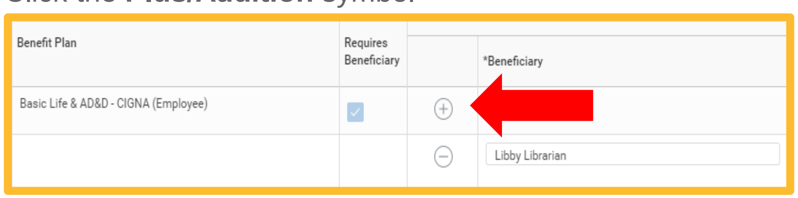
8. **Add, remove, or change allocation** for a beneficiary in the **Beneficiary Designation** screen



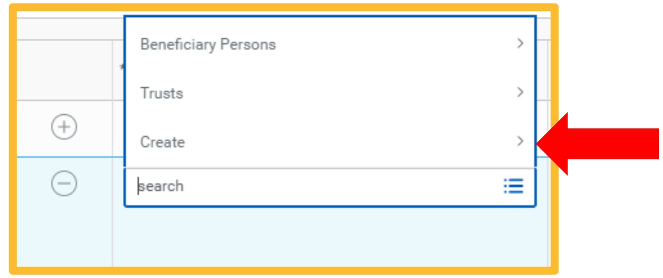
ADD a Beneficiary

a. Identify the **Benefit Plan** to which the beneficiary will be assigned.

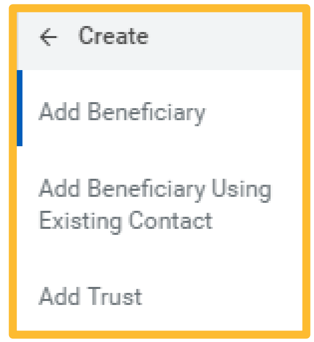
b. Click the **Plus/Addition** symbol



c. Click the Search key to add a new Beneficiary Person or Trust existing in the employee profile or Create a Beneficiary Person or Trust. If using an existing Beneficiary Person or Trust, skip step D.



d. Click the appropriate beneficiary option to Create a Beneficiary Person or Trust [new beneficiary, new trust, or beneficiary identified as an existing contact].

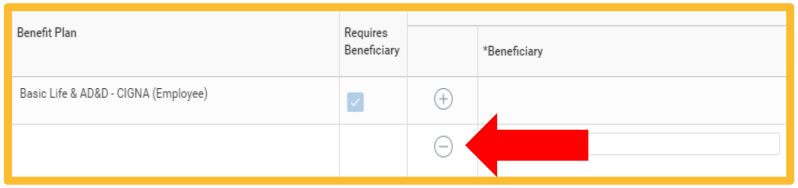


Note: *Beneficiaries will require Legal Name [First and Last], Relationship, Country, and Contact Information [address], to complete a beneficiary designation in Workday.*

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.*

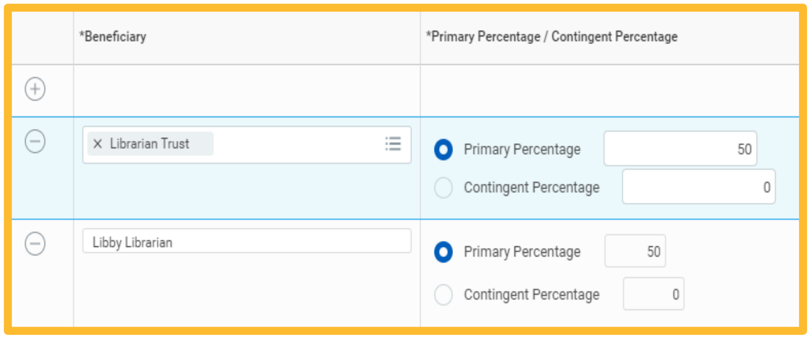
Remove an assigned Beneficiary

a. Click the **Minus/Dash** symbol



Change Allocations for Primary and/or Contingent Beneficiary

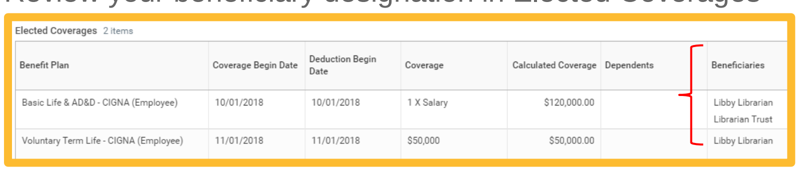
a. Type Primary and/or Contingent Percentage in for each beneficiary by plan (e.g., Basic Life & AD&D, Voluntary Term Life).



Note: Primary Percentages MUST total 100%. You may also add additional beneficiaries to whom you may allocate Contingent Percentage totaling 100%. You may NOT designate the same beneficiary more than one with a benefit plan.

10. Click **Continue**

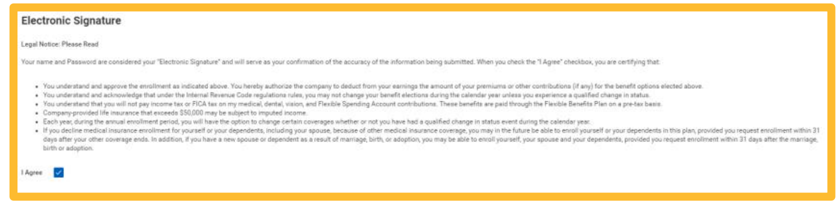
11. Review your beneficiary designation in Elected Coverages



Elected Coverages 2 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries
Basic Life & AD&D - CIGNA (Employee)	10/01/2018	10/01/2018	1 X Salary	$120,000.00		Libby Librarian Librarian Trust
Voluntary Term Life - CIGNA (Employee)	11/01/2018	11/01/2018	$50,000	$50,000.00		Libby Librarian

12. Complete electronic signature "I Agree" check box



13. Click Submit

14. 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.