

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.

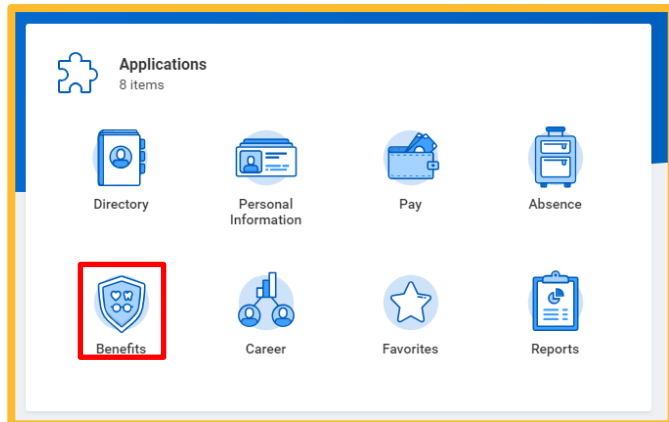
REPORT A BENEFICIARY CHANGE EVENT

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

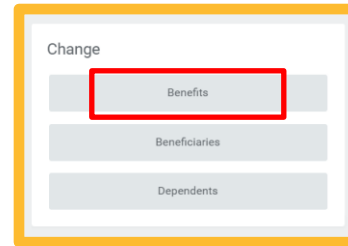
- You may edit your beneficiaries within the Beneficiary Change benefit event type or as an independent beneficiary change task (refer to Manage Beneficiaries below)
- If you are adding a new beneficiary, please provide pertinent contact details and personal information for the beneficiary.

From the Home Page: (Option 1)

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



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



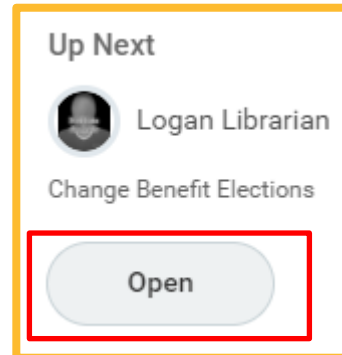
3. Select the **Benefit Event Type** [Beneficiary Change]



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.



- Click **Continue** to modify beneficiaries and/or beneficiary allocations.

Note: Your Insurance Elections appear but are NOT editable.

| Benefit Plan | *Elect / Waive |
|--|---|
| Basic Life & AD&D - CIGNA (Employee) | <input checked="" type="radio"/> Elect <input type="radio"/> Waive |
| Voluntary Term Life - CIGNA (Employee) | <input checked="" type="radio"/> Elect <input type="radio"/> Waive |

Buttons: **Continue**, Save for Later, Cancel

- Add, remove, or change allocation for a beneficiary in the Beneficiary Designation screen

| Benefit Plan | Requires Beneficiary | *Beneficiary | *Primary Percentage / Contingent Percentage |
|--|-------------------------------------|-----------------|--|
| Basic Life & AD&D - CIGNA (Employee) | <input checked="" type="checkbox"/> | Libby Librarian | <input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0 |
| Voluntary Term Life - CIGNA (Employee) | <input checked="" type="checkbox"/> | Libby Librarian | <input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0 |

ADD a Beneficiary

- Identify the **Benefit Plan** to which the beneficiary will be assigned.
- Click the **Plus/Addition** symbol

| Benefit Plan | Requires Beneficiary | *Beneficiary |
|--------------------------------------|-------------------------------------|-------------------|
| Basic Life & AD&D - CIGNA (Employee) | <input checked="" type="checkbox"/> | + |
| | | - Libby Librarian |

- 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.

- Beneficiary Persons
- Trusts
- Create
- Search

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

← Create


- Add Beneficiary
- Add Beneficiary Using Existing Contact
- Add Trust

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

| Benefit Plan | Requires Beneficiary | *Beneficiary |
|--------------------------------------|-------------------------------------|---|
| Basic Life & AD&D - CIGNA (Employee) | <input checked="" type="checkbox"/> | + |
| | | -  |

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).

| *Beneficiary | *Primary Percentage / Contingent Percentage |
|---------------------|---|
| + | |
| - X Librarian Trust | <input checked="" type="radio"/> Primary Percentage <input type="text" value="50"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/> |
| - Libby Librarian | <input checked="" type="radio"/> Primary Percentage <input type="text" value="50"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/> |

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

| 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

Electronic Signature

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 savings 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 31 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 31 days after the marriage, birth or adoption.

I Agree

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.