# Change Benefits (Beneficiary Change Only)

## Overview

This job aid outlines the process for an Employee to add or edit a new beneficiary and make changes to coverage eligible for change outside of a life event or open enrollment

**Prerequisites:** N/A

**Important Information:**

* + The beneficiary must be added as a beneficiary *before* they can be attached to a plan using the **Beneficiary Change Only** event type in the **Change Benefits** process
	+ Changes to medical benefits can only be made during open enrollment or if there has been a qualified life event

### Steps

#### Add Beneficiary

From the Workday Home page:

1. Click the **Benefits** worklet



1. Click the **Beneficiaries** button under **Change**



1. The **Beneficiaries** page is displayed. Click **Add** to add a new beneficiary



**IMPORTANT:** You *must first add* a beneficiary prior to adding them to any benefits so that they become an option in the drop down menu when you go to change benefits

**Note:** You can also edit information on a currently listed beneficiary on this page as shown here

1. On the **Add My Beneficiary** page, select one of the following options:
* Create a New Beneficiary
* Create a New Trust as Beneficiary



1. Click **OK**
2. Complete or edit the following required fields:
* Country
* First Name
* Last Name



1. Select the appropriate **Relationship** to the Employee (Child, Spouse, Parent, Sibling, etc.)



1. Enter the **Date of Birth** and **Gender** for the beneficiary



**Note:** Gender is a required field

1. Enter any **Primary** or **Additional Address,** **Phone Numbers** or **Emails** for the beneficiary in the **Contact Information** section by clicking **Add**



**Note:** **Primary Address** and **Primary Phone Number** are required fields

Click **Submit.** You will receive a To Do providing instructions on how to add this Beneficiary to your Benefits (see the next section for details)



**Note:** If you only made an edit to a beneficiary’s data and do not need to make changes to the benefits elections attached to the individual and then **Submit**

#### Up Next

If you need to add this beneficiary to coverage, the next step is to attach the beneficiary to your life and/or AD&D coverage through the **Change Benefits** process**. This is critical to the completion of the Change Beneficiary process**

##### Change Benefits

From where you left off in adding the new beneficiary, from the To Do in your inbox *or* from the Workday Home page you can begin this process. This section guides you from the Workday Home page:

1. Click the **Benefits** worklet

 

1. Click **Benefits** under the Change column



1. Complete the following:
	* **Benefit Event Type.** Select Beneficiary Change Only from the drop-down listing
	* **Benefit Event Date.** Enter today’s date



**Note:** The **Submit Elections By** and **Enrollment Offering Types** will auto-populate based on what is selected previously

1. Click **Submit**
2. You will see the following message:



1. Click **Open**

##### Tobacco Use

1. You will now have an opportunity to make updates to Tobacco Use for you and your spouse



1. Click **Continue**

##### Insurance Elections

This section is not available for updates unless you initiate the Change Benefits business process for a Life Event

1. Click **Continue**

##### Beneficiary Designations

1. Here you can add beneficiaries to your coverages eligible for changing outside of a life event or open enrollment

Locate the plan for which you want to make a change and under the Beneficiary column you will Add, Delete or Edit a chosen beneficiary from the plan. See below



1. Make sure you designate **Primary** or **Contingent Percentages**



1. Click **Continue**
2. Select the **I Agree** checkbox after reviewing the elections



1. Click **Submit**

This completes the **Change Benefits (Beneficiary Change Only)** process