Benefits: Manage Beneficiaries from Inbox Task

Manage Beneficiaries from an Inbox Task

1. Click your Profile Icon in the upper right hand corner to access your Workday Inbox.

2. Select Benefit Change: Update Beneficiaries task from your Actions.

3. Click Continue at the bottom of your screen.

Change Benefit Elections Update Beneficiaries Step 1 of 3 displays.
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Change Benefit Elections Update Beneficiaries Step 2 of 3 displays.

Here you can designate Life Insurance Beneficiaries

1. Click the Plus icon + to add a beneficiary.

2. Click the prompt icon : in the Beneficiary, click Create. The following choices will be listed. You should start by selecting Add Beneficiary Using Existing Contact to see if your dependents/spouse are listed as contacts. (If not, you can always create a new one.)

3. Click the prompt on the Existing Contact field to reveal contacts you may use as a beneficiary.

4. To remove a beneficiary, click the minus icon - next to that beneficiary.

5. If there are no contacts save, you will need to create your beneficiaries.

6. Select Add Beneficiary.

7. Fill in the form that displays. Fields with a red asterisk must be completed. If this is a new contact, you will have to add an address for this contact.
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8. Click OK.

9. To remove a beneficiary, click the minus icon next to that beneficiary.

10. Enter the percentage of benefits for each beneficiary in the **Primary Percentage / Contingent Percentage** column. Your primary beneficiary and contingent beneficiaries must add up to 100%.

11. Click Continue.

**Change Benefit Elections Update Beneficiaries Step 3 of 3 displays.**

1. Review your beneficiary elections here and provide your electronic signature, by selecting I Agree.

2. Click Submit.

**Submit Elections Confirmation Update Beneficiaries page displays.**

1. Review your beneficiary elections and select Print (if desired) and Done to complete.