# Beneficiary Change

**Overview**
Beneficiary Change allows you to assign beneficiaries for your Life Insurance and AD&D plans.

**Who Does This:** Employee

**Things to Know:**
- You can change your beneficiaries at any time.

**To Edit a Beneficiary already entered in Workday, please go to Step 20.**

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| **Benefits** | **Step 1**<br>Access Workday online or via your mobile device.<br><br>Click on the **Benefits** worklet. |
| Change<br><br>Benefits<br><br>Beneficiaries<br><br>Dependents | **Step 2**<br>Under Change, click on **Benefits**. |
| Change Reason * select one ▼ | **Step 3**<br>Click the down arrow to access the Change Reason menu. |
| Change Reason * Beneficiary Change ▼<br><br>Benefit Event Date * 04/12/2022 📅<br><br>Submit Elections By 04/16/2022 | **Step 4**<br>Select **Beneficiary Change** from the list of Change Reasons.<br><br>Use the calendar icon 📅 to select today's date as the Benefit Event Date.<br><br>You do not need to attach any documents. |
| Submit | **Step 5**<br>Click **Submit.** |

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| **You have submitted**<br><br>Up Next: Sally Smith, Change Benefit Elections<br>View Details<br><br>Open<br><br>_____<br><br>**Inbox**<br>10 items<br><br>Benefit Change - Beneficiary Change : Sally Smith on 04/12/2022<br>1 minute(s) ago - Effective 04/12/2022 | **Step 6**<br>Up Next, click **Open** to start the actual **Beneficiary Change** task.<br><br><br><br>The **Beneficiary Change** task will also be in your Workday Inbox.<br><br>You can access it either way. |
| **Change Benefit Elections**<br><br>2 minute(s) ago - Effective 04/12/2022<br><br>Initiated On          04/12/2022<br><br>Submit Elections By     04/16/2022<br><br>Let's Get Started | **Step 7**<br>Click **Let's Get Started**. |
| **Update Your Information**<br><br>**Health Information**<br><br>**Tobacco Use**<br><br>Question     Have you used tobacco in any form in the past 12 months?<br><br>Answer   *   ○ Yes<br>         ● No<br><br><br>Continue | **Step 8**<br>Answer the **Tobacco Use** question.<br><br><br><br><br><br>Click **Continue**. |
| Continue | **Step 9**<br>Click **Continue** again on the next screen. |

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| **USA - Basic Life**<br>Unum (Employee)<br><br>Cost (Semimonthly)      Included<br><br>Coverage      1 X Salary<br><br>Manage<br><br>**Confirm and Continue** | **Step 10**<br>On the Beneficiary Change page, click on the "tile" for each Insurance plan that you wish to designate a beneficiary.<br><br><br><br>Click **Manage** on the desired plan tile.<br><br><br><br>Click **Confirm and Continue**. |
| Primary Beneficiaries   0 items<br><br>(+)   Beneficiary<br><br><br>(+)   Beneficiary<br>(−)   [                ☰] | **Step 11**<br>On the Beneficiaries page, click on the **+** sign to create a new line for each beneficiary you want to add.<br><br><br><br>Click on the drop-down menu ☰ to select if you want to add a new beneficiary or a trust. |
| **Add New Beneficiary or Trust**   Sally Smith   •••<br><br>Relationship    *   [× Spouse       ☰]<br><br>Use as Beneficiary   ☑<br><br>Date of Birth   [02/02/1980 📅]<br><br>Age   42 years, 2 months, 10 days<br><br>Gender   [Male       ▼] | **Step 12**<br>Click on the drop-down menu ☰ to select your beneficiary's **relationship**.<br><br>Enter their **date of birth** and **gender**. |

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| **Legal Name**  Contact Information  National IDs  Additional Government IDs  Other IDs<br><br>Country \*  ✕ United States of America  ☰<br><br>Prefix  ☰<br><br>First Name \*  John<br><br>Middle Name<br><br>Last Name \*  Smith<br><br>Suffix  ☰ | **Step 13**<br>Scroll down under Legal Name and enter their **first name** and **last name.** |
| Legal Name  **Contact Information**  National IDs  Additional Government IDs  Other IDs<br><br>**Phone**<br>( Add )<br><br>**Address**<br>( Add )<br><br>Use Existing Address  ✕ 1o Main Street for Sally Smith  ☰<br><br>Country  United States of America<br><br>Address Line 1  1o Main Street<br><br>Address Line 2<br><br>City  Carlsbad<br><br>State  California<br><br>Postal Code  92008<br><br>County<br><br>**Usage**<br><br>Type \*  ✕ Home  ☰ | **Step 14**<br>Move over next to Legal Name and click on the **Contact Information** tab. Click on **Add Address.**<br><br><br><br>Enter the beneficiary's **address** and the address **Usage Type**: Home or Work. |
| Legal Name  Contact Information  **National IDs**<br><br>National IDs  0 items<br><br>⊕  \*Country | **Step 15**<br>Move over next to Contact Information and click on the **National IDs** tab.<br><br><br><br>Click on the **+** sign to add a line. |

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| *Country    *National ID Type    Current ID    Add/Edit ID<br><br>× United States of America    × Social Security Number (SSN)    123-45-6789<br><br><br>**OK** | Enter the **Country**. Indicate that the **National ID Type** is SSN and add the beneficiary's **social security number.**<br><br>Issue date and expiration date are not necessary.<br><br>Click **OK**. |
| Primary Beneficiaries 1 item<br><br>⊕   Beneficiary      Percentage<br>⊖   × John Smith ⧉      0<br><br>Secondary Beneficiaries 0 items<br><br>⊕   Beneficiary      Percentage<br><br>**Save** | **Step 16**<br>Returning to the Beneficiaries page, enter the **percentage** allocation for the beneficiary you just entered. (The percentage will be 100% if you want just one beneficiary on that plan.)<br><br>You may click **+** to add more beneficiaries. Be sure that the sum of all Primary Percentages on a benefit plan equals 100%.<br><br>You may then decide to enter **Secondary Beneficiaries**. Click **+** to enter and follow the above steps.<br><br>When finished, click **Save**. |
| **Your USA - Basic Life changes have been updated, but not submitted**<br><br>**Next steps:** Update another plan, or click Review and Sign once you're ready to submit your changes.<br><br>🛡 **USA - Basic AD&D**<br>Unum (Employee)<br><br>Cost (Semimonthly)      Included<br>Coverage      1 X Salary<br><br>Manage | **Step 17**<br>The above changes are not yet saved.<br><br>If you want to add your beneficiary to another plan, click **Manage** on that plan's tile.<br><br>Go back to step 10 and follow the steps. |
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| **Review and Sign** | **Step 18**<br>When you are done adding beneficiaries, move to the bottom of the Beneficiary Change screen and click **Review and Sign**. |

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| **View Summary**<br><br>**Electronic Signature**<br><br>**LEGAL NOTICES: Please Read**<br><br>I Accept ☑<br><br>**Submit** | **Step 19**<br>Review the View Summary page for errors.<br><br>Read the Electronic Signature block.<br><br>When you understand and agree, click the **I Accept** box.<br><br>Click **Submit**. |
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| Change<br><br>Benefits<br><br>Beneficiaries<br><br>Dependents | **Step 20**<br>To **Edit** a beneficiary already entered in Workday, click on the Benefits worklet. Under **Change,** click on **Beneficiaries.** |
| Beneficiary | Relationship<br>John Smith | Spouse | Edit | **Step 21**<br>Click on **Edit** next to the beneficiary's name. |
| **Primary Address**<br><br>Address<br>1o Main Street, Carlsbad, CA 92008   ✕  ✎ | **Step 22**<br>Click on the pencil icon in the section where you want to make changes. Enter the changes. |
| **Submit** | **Step 23**<br>When finished, click **Submit**. |

# FAQ's

**How can I edit or delete my beneficiaries information?**  If you need to change information (such as relationship or contact information) regarding your beneficiaries, select the Benefit worklet, then under Change, choose Beneficiaries.

**How do I add a beneficiary to my 401k plan?**  Please visit the Fidelity site at www.401k.com.

**How do I add a beneficiary to my WEX Health Savings Account?** Please visit www.wexinc.com and select "profile."

**Can I have more than one beneficiary for a plan?** Yes. After you add a beneficiary, select the + icon again and add another beneficiary.  Remember that the total primary beneficiary percentage by plan cannot be more than 100% and the contingency percentage must also equal 100%.

**Can I have different beneficiaries for different plans?**  Yes. On Step 17 above, you can select or create different beneficiaries for each plan listed.

**What is the difference between a primary beneficiary and a contingent beneficiary?**  Your primary beneficiary is first in line to receive the named benefits.   Contingent beneficiaries will only receive benefits if the primary beneficiary is deceased.

Please contact benefits@coorstek.com with questions.