


STAFF AND FACULTY: ADD LIFE INSURANCE BENEFICIARY

Follow the steps below to add or change a beneficiary to your Life Insurance in Workday. Once you have entered a beneficiary for Life Insurance, this beneficiary will be utilized for all LifeMap insurances whether College paid or voluntary including Employee or Spouse Life or Employee or Family AD&D. To add beneficiaries for TIAA-CREF 403(b) plan, you need to add in the TIAA-CREF website at www.tiaa-cref.org.

1. Open **Benefits** on your Workday **Home** screen and select the **Benefits** link in the **Change** section.
2. Select the **Benefit Event Type “Change Life Insurance Beneficiary”** and **Date**. You can use today’s date. For this type of event you do not need to attach any documents. Click **Submit**.


Benefit Event Type *

- ☒ Change Life Insurance Beneficiary
- ☐ Dependent Care FSA Change
- ☐ Dependent Change (Birth / Adoption / Guardianship)
- ☐ Divorce
- ☐ Gain Outside Coverage
- ☐ Lose Outside Coverage
- ☐ Marriage
- ☐ Optional Insurance
- ☐ Retirement Savings Change

Benefit Event Date * 

3. The next screen will show the next step. Click on **Open**.

Up Next

 Jane Austen

Change Benefit Elections

Due Date 03/08/2015

Open

4. The first screen of Change Benefit Elections will show what insurance plan you are currently enrolled in. Click **Continue** to move on to the next screen.

Change Benefit Elections Change Life Insurance Beneficiary for Jane Austen - Step 1 of 3 ...

Event Date 03/07/2015 Total Cost \$0.00 Monthly Cost

Initiated On 03/06/2015 Total Credits \$0.00 Monthly Credit

Submit Elections By 03/06/2015

You are automatically entered into 1.5X your base salary for Life and Accidental Death and Dismemberment (AD&D) Insurance. In addition, you are entered automatically into Long Term Disability at 60% of base pay. There are many voluntary insurance options available to you. If you sign up within the first 31 days of employment, you are guaranteed up to \$100,000 amount of coverage (guarantee issue amount). You can sign up for voluntary insurance at anytime, but employees have to submit evidence of insurability (EOI) form (health statement). Otherwise, a spouse always needs to submit an EOI and an employee must submit if over the guarantee issue or if you sign up after your first 31 days of employment. To review the insurance information go to http://www.lclark.edu/offices/human_resources/employee_resources/benefits/financial_security/

Insurance Plan Dependencies and Coverage Limitations

Insurance Elections

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents	Calculated Coverage	Employer Contribution (Monthly)	Benefit Credit (Monthly)	Provider Website
Basic Life - LifeMap Assurance Company (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	1.5 X Salary		\$93,000.00	\$12.74	0.00	LifeMap Assurance Company
					12.74	0.00	

Continue **Save for Later** **Cancel**

5. Click the **Add** icon in the **Beneficiary** column to designate a Life Insurance beneficiary.


Note: To designate a beneficiary for TIAA-CREF Retirement elections, please sign in at <https://www.tiaa-cref.org/public/index.html>.

Change Benefit Elections Change Life Insurance Beneficiary for Jane Austen - Step 2 of 3 ...

Event Date 03/07/2015 Total Cost \$0.00 Monthly Cost Total Credits \$0.00 Monthly Credit
 Initiated On 03/06/2015
 Submit Elections By 03/06/2015

Your beneficiary is very important for you to complete. A beneficiary is the person or persons who will receive your life insurance benefit in the event you die. You can designate primary and / or contingent beneficiaries. Just make sure that each primary and each contingent designation(s) add up to 100%. The more information you enter into Workday, the easier it will be for Lewis & Clark to find your beneficiaries. The beneficiary information you add here is for all insurances whether it be for life insurance, dependent life, accidental death and dismemberment or voluntary insurances. This beneficiary information is not for TIAA-CREF retirement funds. To designate a beneficiary for TIAA-CREF, please go to the TIAA-CREF website: <https://www.tiaa-cref.org> and enter your beneficiary for both voluntary contributions as well as the 9% College contribution.

Beneficiary Designations

Benefit Plan	Provider Website	Requires Beneficiary	Beneficiaries	
			*Beneficiary	*Primary Percentage / Contingent Percentage
Basic Life - LifeMap Assurance Company (Employee)	LifeMap Assurance Company	<input type="checkbox"/>		

Continue Save for Later More ▾


6. Click the **Prompt** icon next to the Beneficiary field. If you designated your dependents as beneficiaries in the past, they will be listed here. Click a name to select it, or click **Create** -> **Add Beneficiary** to add additional beneficiaries.

Change Benefit Elections Change Life Insurance Beneficiary for Jane Austen - Step 2 of 3 ...

Event Date 03/07/2015 Total Cost \$0.00 Monthly Cost Total Credits \$0.00 Monthly Credit
 Initiated On 03/06/2015
 Submit Elections By 03/06/2015

Your beneficiary is very important for you to complete. A beneficiary is the person or persons who will receive your life insurance benefit in the event you die. You can designate primary and / or contingent beneficiaries. Just make sure that each primary and each contingent designation(s) add up to 100%. The more information you enter into Workday, the easier it will be for Lewis & Clark to find your beneficiaries. The beneficiary information you add here is for all insurances whether it be for life insurance, dependent life, accidental death and dismemberment or voluntary insurances. This beneficiary information is not for TIAA-CREF retirement funds. To designate a beneficiary for TIAA-CREF, please go to the TIAA-CREF website: <https://www.tiaa-cref.org> and enter your beneficiary for both voluntary contributions as well as the 9% College contribution.

Beneficiary Designations

Benefit Plan	Provider Website	Requires Beneficiary	*Beneficiary	*Primary Percentage / Contingent Percentage
Basic Life - LifeMap Assurance Company (Employee)	LifeMap Assurance Company	<input type="checkbox"/>		

Beneficiary Persons

Truets

Create

Add Beneficiary

Add Beneficiary Using Existing Contact

Add Trust

Primary Percentage 0

Contingent Percentage 0

7. Complete Add Beneficiary form. Required fields are marked with a red asterisk. After completing **Legal Name** screen, click on **Contact Information** to add an address. At least one address is required for beneficiaries. When done, click **OK**.

Add Beneficiary Jane Austen ...

Enter your beneficiary information.

Relationship * Sibling

Use as Beneficiary ☒

Date of Birth 12/03/1970

Age 44 years, 3 months, 3 days

Gender X Male

Full-time Student ☐

Student Status Start Date

Student Status End Date

Disabled ☐

Allow Duplicate Name ☐

Legal Name Contact Information National IDs Additional Government IDs Other IDs

Country * United States of America

Prefix search

First Name * Henry

Middle Name

Last Name * Austen

Suffix search

OK Cancel

8. Enter **Percentage** amounts for selected beneficiaries. You may add additional beneficiaries at this point by clicking on the + under Beneficiary and going through the original process again. Both Primary and Contingent percentages need to add up to 100% each. When done, click **Continue**.

Change Benefit Elections Change Life Insurance Beneficiary for Jane Austen - Step 2 of 3 ...

Event Date 03/07/2015 Total Cost \$0.00 Monthly Cost Total Credits \$0.00 Monthly Credit

Initiated On 03/06/2015

Submit Elections By 03/06/2015

Your beneficiary is very important for you to complete. A beneficiary is the person or persons who will receive your life insurance benefit in the event you die. You can designate primary and / or contingent beneficiaries. Just make sure that each primary and each contingent designation(s) add up to 100%. The more information you enter into Workday, the easier it will be for Lewis & Clark to find your beneficiaries. The beneficiary information you add here is for all insurances whether it be for life insurance, dependent life, accidental death and dismemberment or voluntary insurances. This beneficiary information is not for TIAA-CREF retirement funds. To designate a beneficiary for TIAA-CREF, please go to the TIAA-CREF website: <https://www.tiaa-cref.org> and enter your beneficiary for both voluntary contributions as well as the 9% College contribution.

Beneficiary Designations

Benefit Plan	Provider Website	Requires Beneficiary	Beneficiaries	
			*Beneficiary	*Primary Percentage / Contingent Percentage
Basic Life - LifeMap Assurance Company (Employee)	LifeMap Assurance Company	<input type="checkbox"/>	+	
			-	Henry Austen
				<input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0

Continue Save for Later More

9. Check **Electronic Signature** box at bottom of screen next to “I Agree”. Click **Submit**.

Change Benefit Elections
Benefit Elections Review for Change Life Insurance Beneficiary - Step 3 of 3

Worker	Jane Austen	Total Cost	\$0.00 Monthly Cost	Total Credits	\$0.00 Monthly Credit	Total Employee Net Cost/Credit	\$0.00 Monthly Cost
Event Date	03/07/2015						
Initiated On	03/06/2015						
Submit Elections By	03/06/2015						

Elected Coverages 2 Items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employer Contribution (Monthly)	Benefit Credit (Monthly)
Basic Life - LifeMap Assurance Company (Employee)	03/01/2014	02/01/2014	1.5 X Salary	\$93,000.00		Henry Austen	\$12.74	
							Total: 12.74	0.00

Beneficiary Designations

Attachments

Attachment	Comment	File
No Data		

Electronic Signature

Clicking the checkbox is considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. You declare that you have examined your elections and to the best of your knowledge and belief, they are true, correct, and complete.
2. You understand that all submissions are contingent upon acceptance by your benefits representative.

These elections are not valid without an electronic signature.

I Agree ☒

enter your comment

Submit Save for Later More

10. Close next screen. You now have beneficiaries attached to your Life Insurance. In the future, you can edit Beneficiary information (such as address) by going to the **Benefits** worklet on your Workday **Home** screen and selecting the **Beneficiary** link in the **Change** section of the pop-up window.