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. 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.**

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

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

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.
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**.

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

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.