workday@UCHICAGO

Have a nice Workday

Change Beneficiaries

Keep in Mind

- You have 7 days to complete your beneficiary change. After 7 days, you will need to re-initiate the event.
- If you are modifying your beneficiaries or dependents, you must provide Social Security Numbers, Dates of Birth, and Addresses for those individuals.

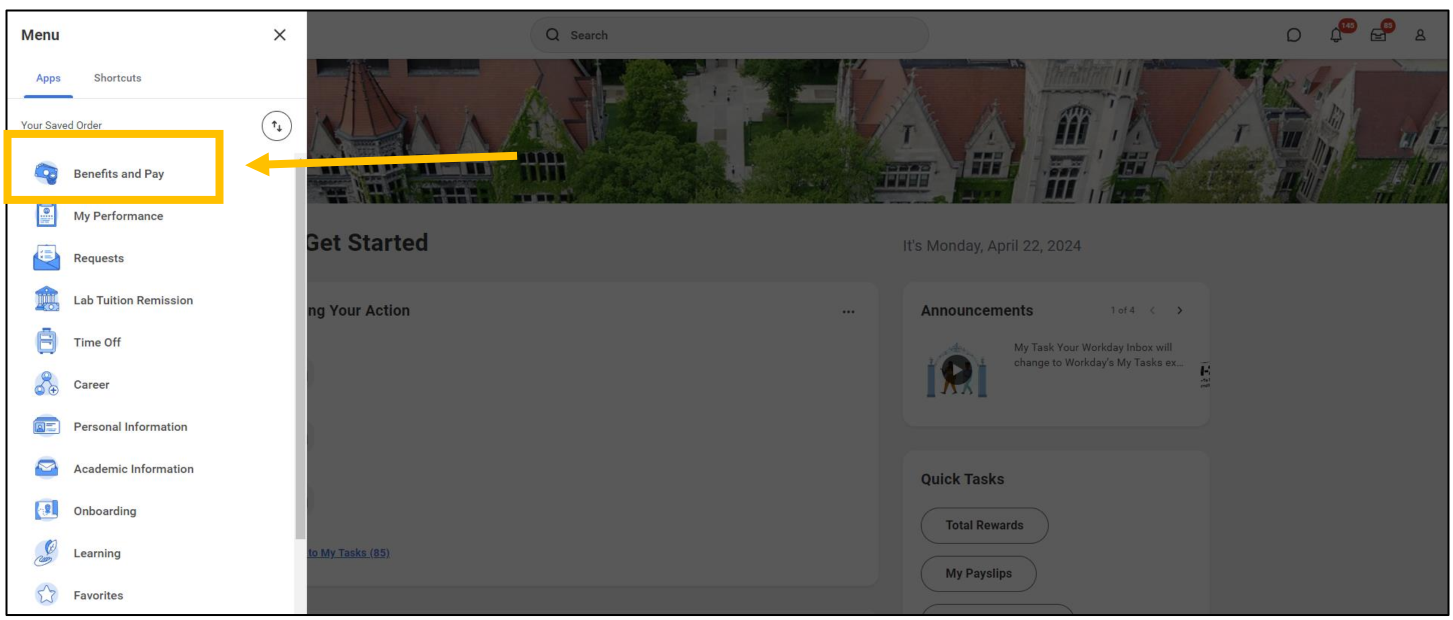
Purpose

This document explains how to designate or change beneficiaries for Basic Life Insurance, Supplemental Life Insurance, and/or Personal Accident Insurance.

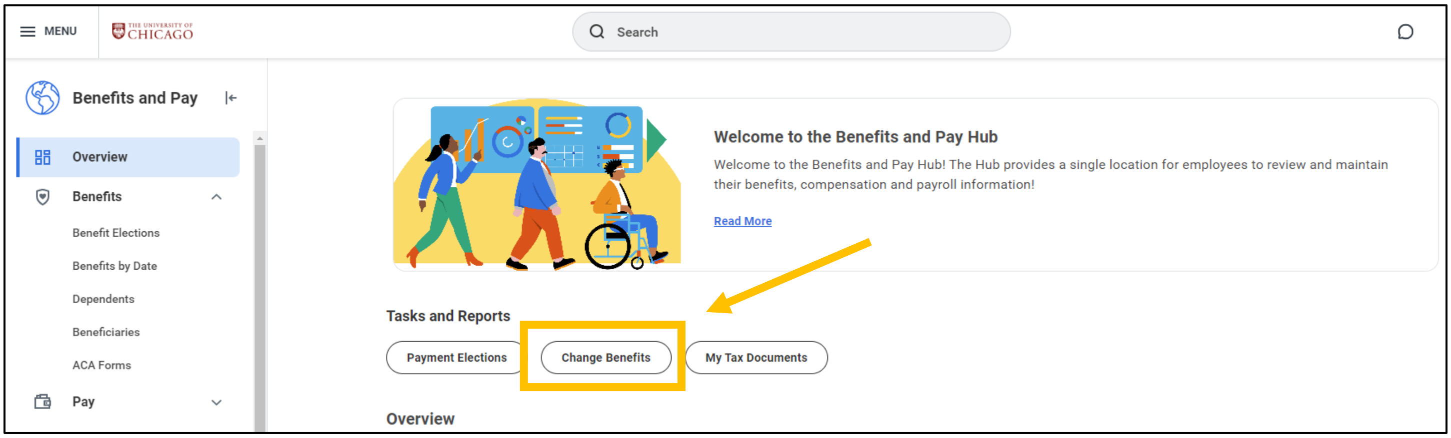
To designate or change beneficiaries for Retirement plans, log into your [TIAA account].

Steps to Change Beneficiaries

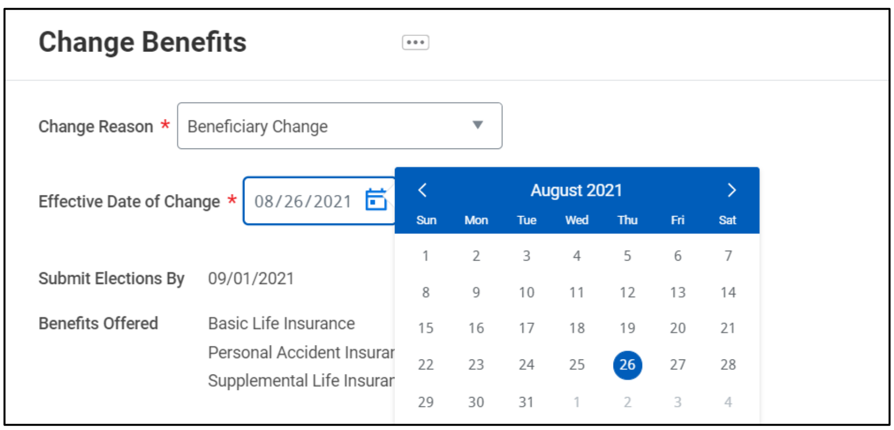
1. Log in to [Workday] using your CNet ID and Password.
2. From the Home page, click **Menu** at the top left of the screen. Click **Benefits and Pay**.



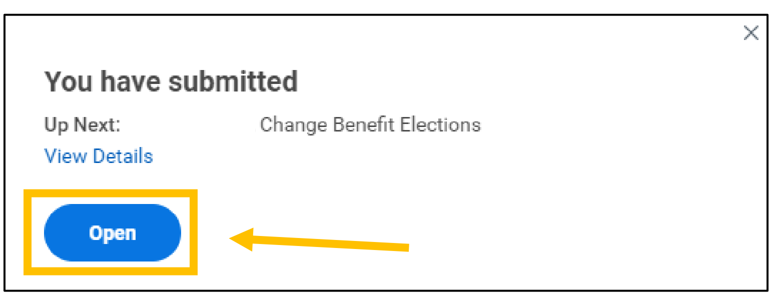
3. From the Overview page, click the Change Benefits button under Tasks and Reports.



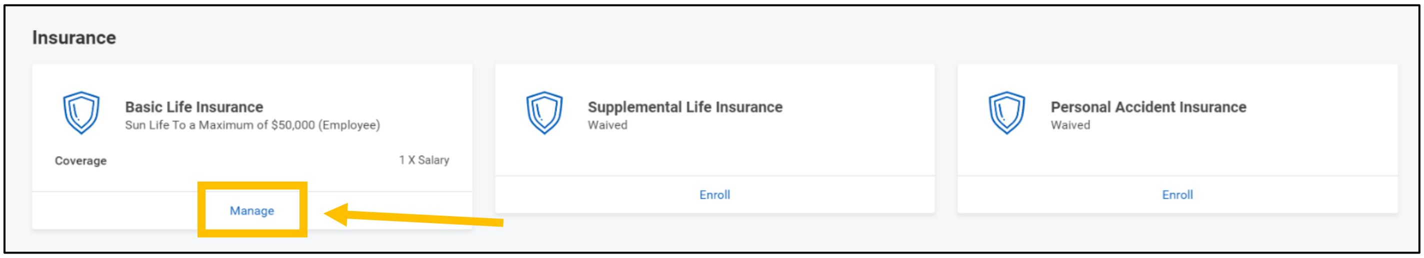
4. From the **Change Reason** dropdown menu, choose **Beneficiary Change**.
5. Enter today's date or a date in the future as the **Effective Date of Change** by typing in the prompt box or using the calendar icon.



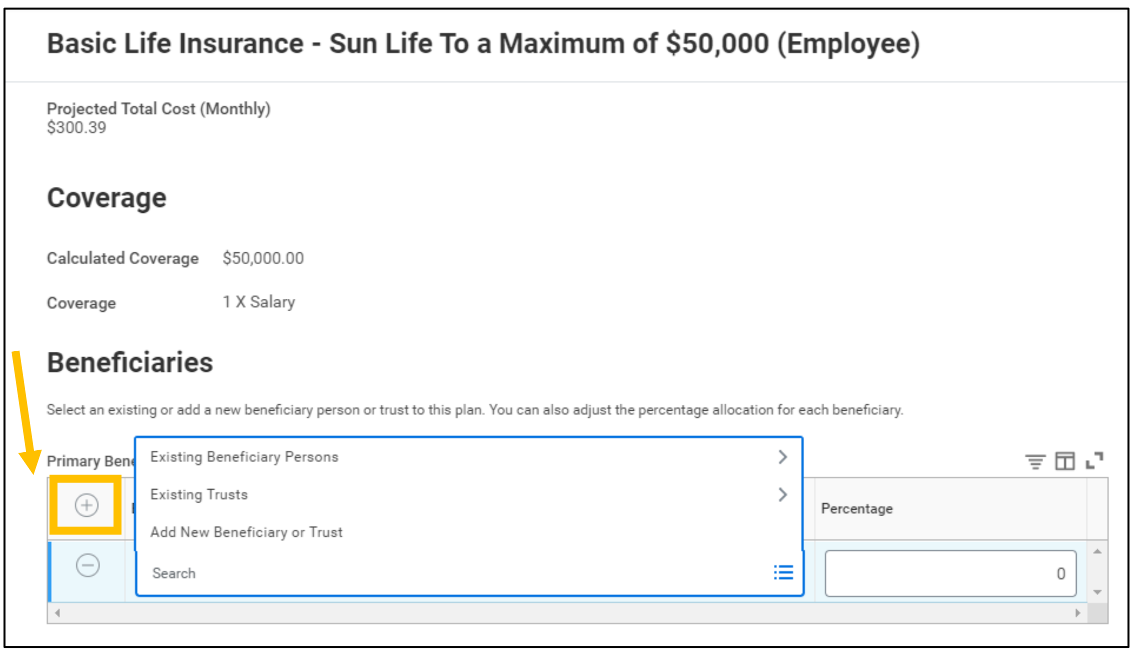
6. Click the **Submit** button.
7. You will see a pop-up with the next task to complete. Click **Open**.



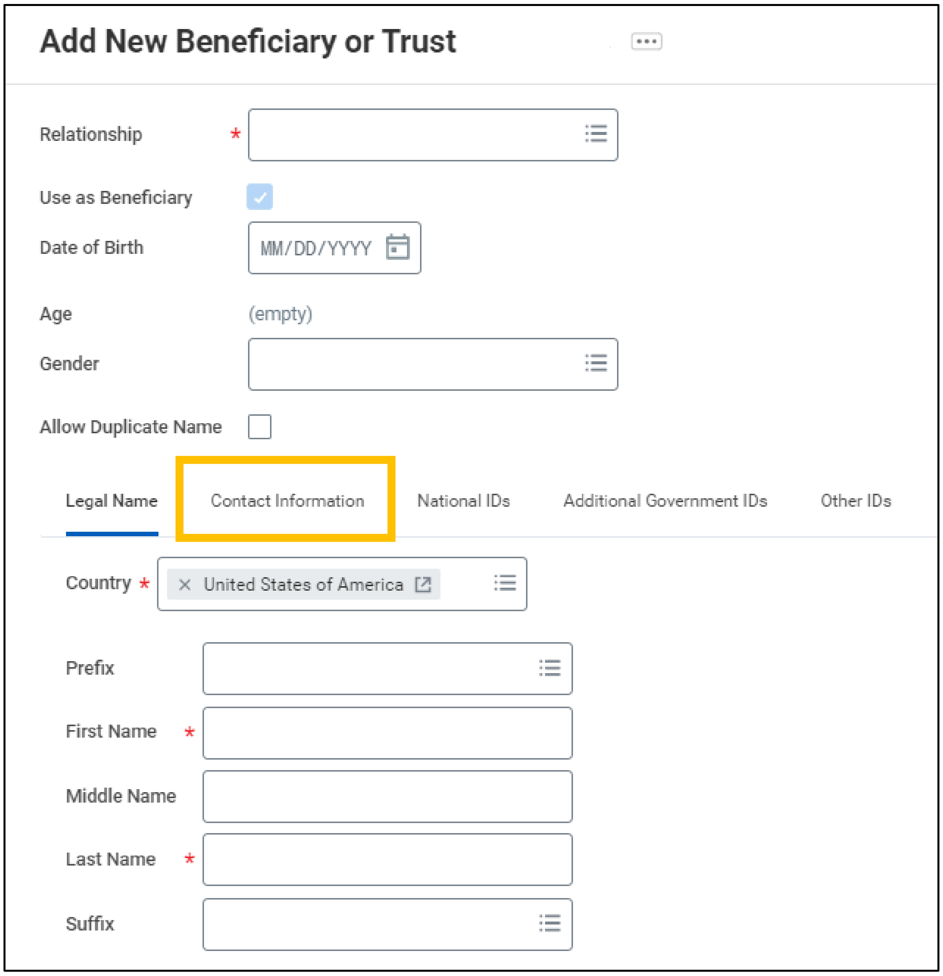
8. On the next screen, click the **Let's Get Started** button.
9. To change or designate beneficiaries, click **Manage** on the appropriate plan card.

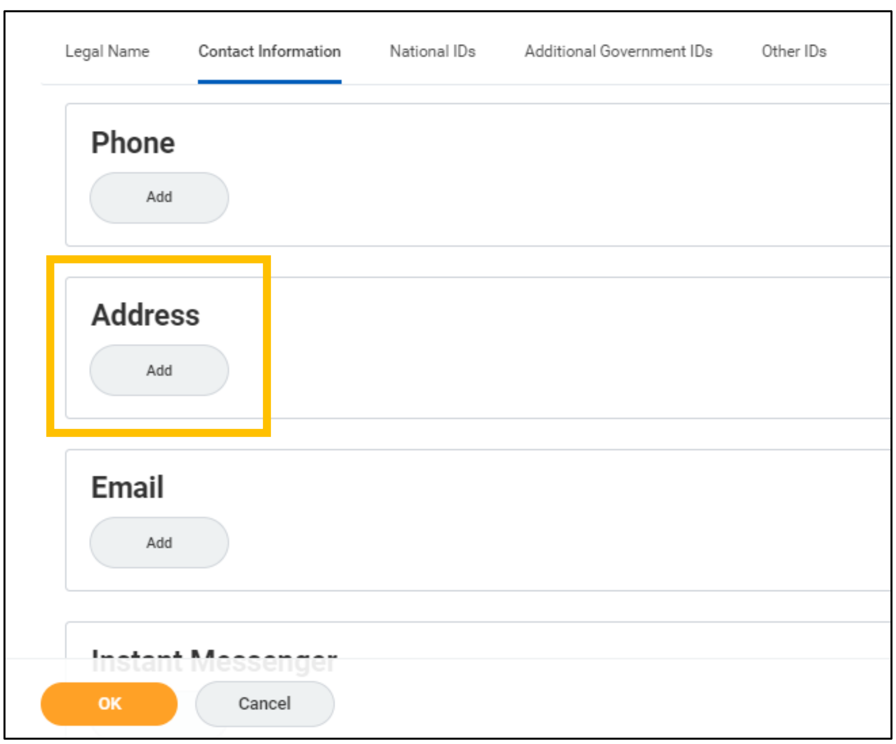


10. The Insurance Plan will be selected with no option to waive. Click the **Confirm and Continue** button at the bottom of the screen.
11. Use the Plus (+) radio button under Beneficiaries to add one or more beneficiary persons or trusts.
    a. If you already created Beneficiary Persons or Trusts, or checked the **Use as Beneficiary** box when creating your dependent(s), they will be available to select. Otherwise, use Add New Beneficiary or Trust to create a new beneficiary person or trust.

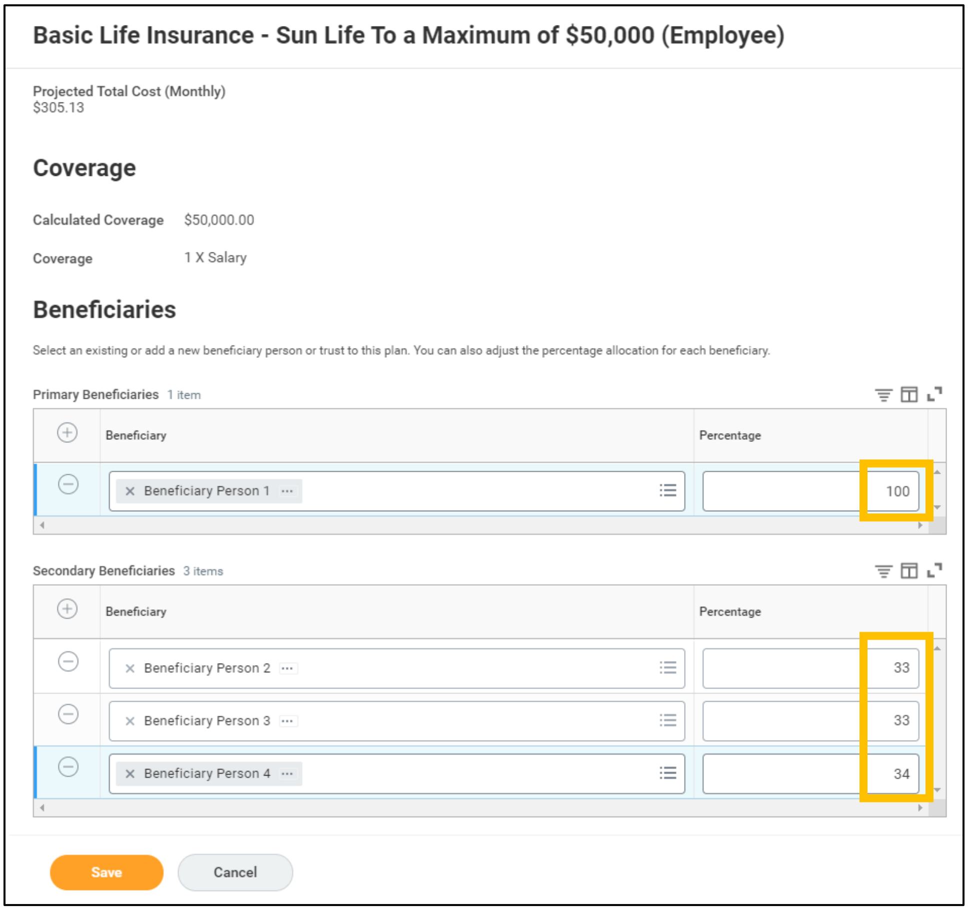


    b. For each new beneficiary person, you must enter a first & last name, relationship to you, and an address. To enter an address, click on the Contact Information tab.

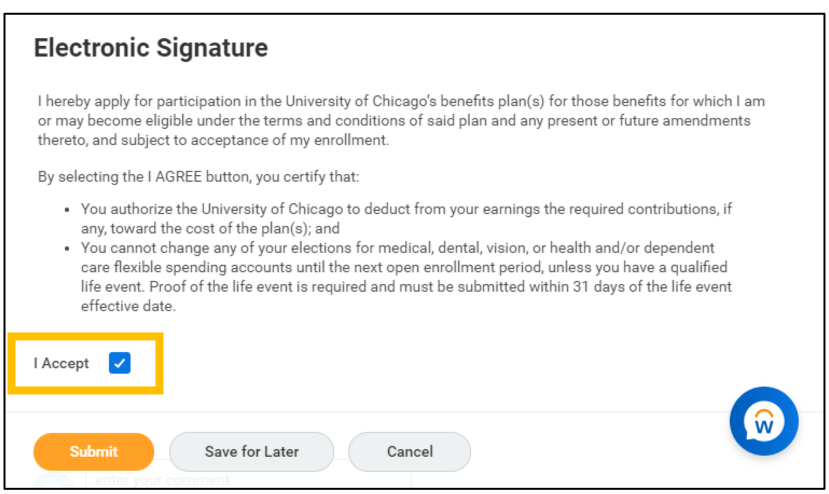

Add New Beneficiary or Trust
Relationship *
Use as Beneficiary
Date of Birth
MM/DD/YYYY
Age
(empty)
Gender
Allow Duplicate Name
Legal Name
Contact Information
National IDs
Additional Government IDs
Other IDs
Country *
United States of America
Prefix
First Name *
Middle Name
Last Name *
Suffix


Legal Name
Contact Information
National IDs
Additional Government IDs
Other IDs
Phone
Add
Address
Add
Email
Add
Instant Messenger
OK
Cancel

c. You may add as many beneficiary persons or trusts as you wish, but the sum of Percentages must be equal to 100% for both Primary and Secondary Beneficiaries.



12. Click **Save**.
13. Once you have made all your beneficiary designations, click the **Review and Sign** button.
14. Review the Selected Benefits with your new list of beneficiaries.
15. Scroll down to the bottom of the page. Read the Electronic Signature and click the **I Accept** checkbox.
16. Click **Submit**.



17. Click the **View Benefits Statement** button to print your beneficiary change for your records.
    a. You will be able to view your updated beneficiary designations on your Workday profile once the effective date has passed.