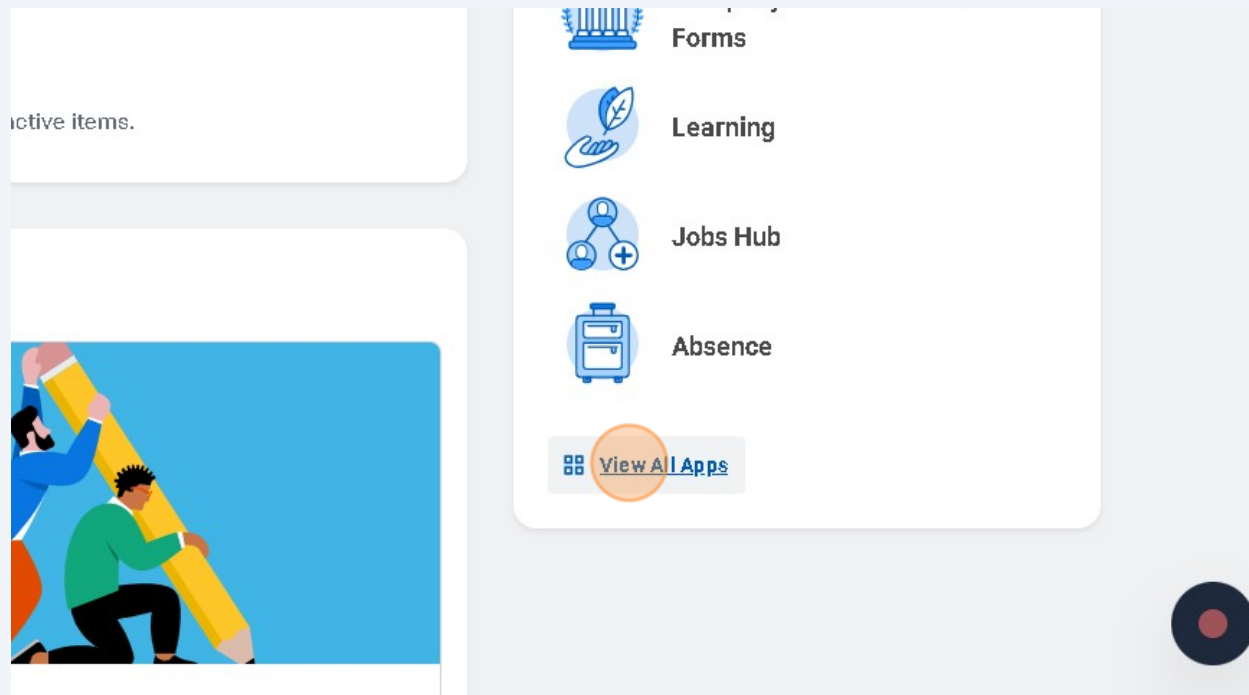


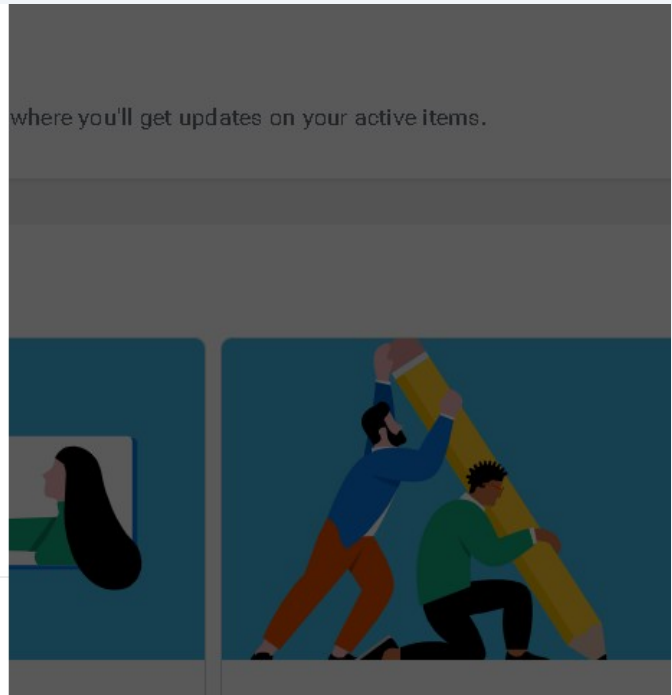
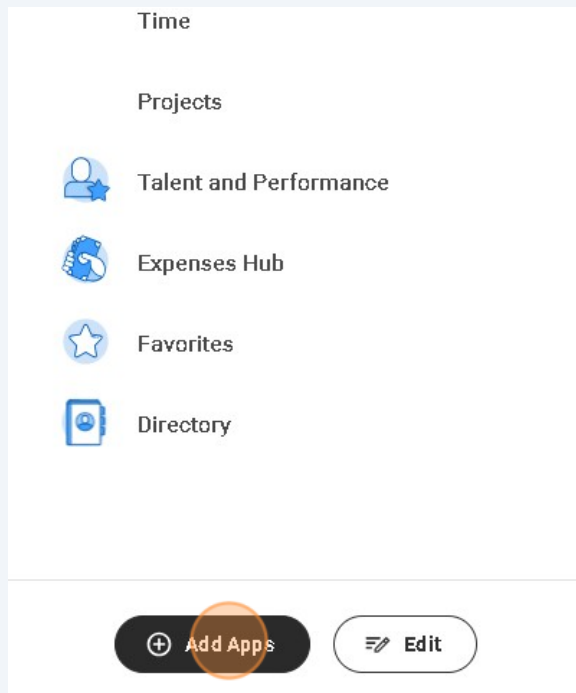
Add a Beneficiary

1

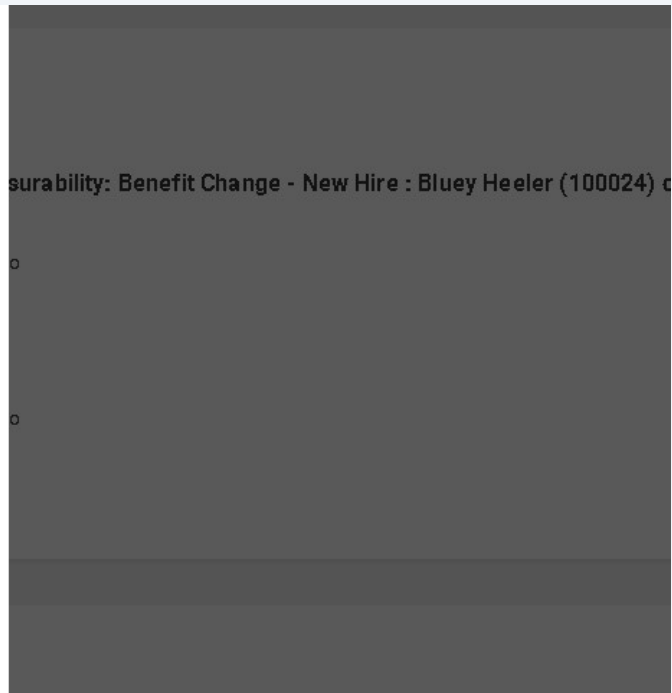
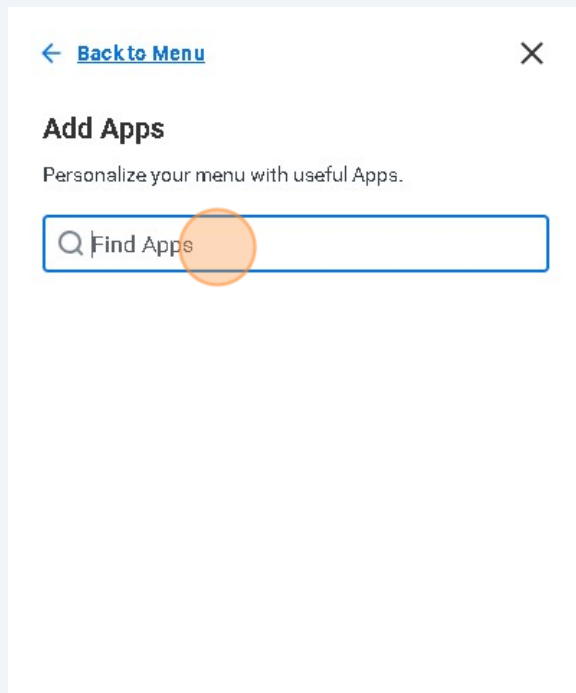
Click "View All Apps" on Workday home screen if the Benefits and Pay App is not visible



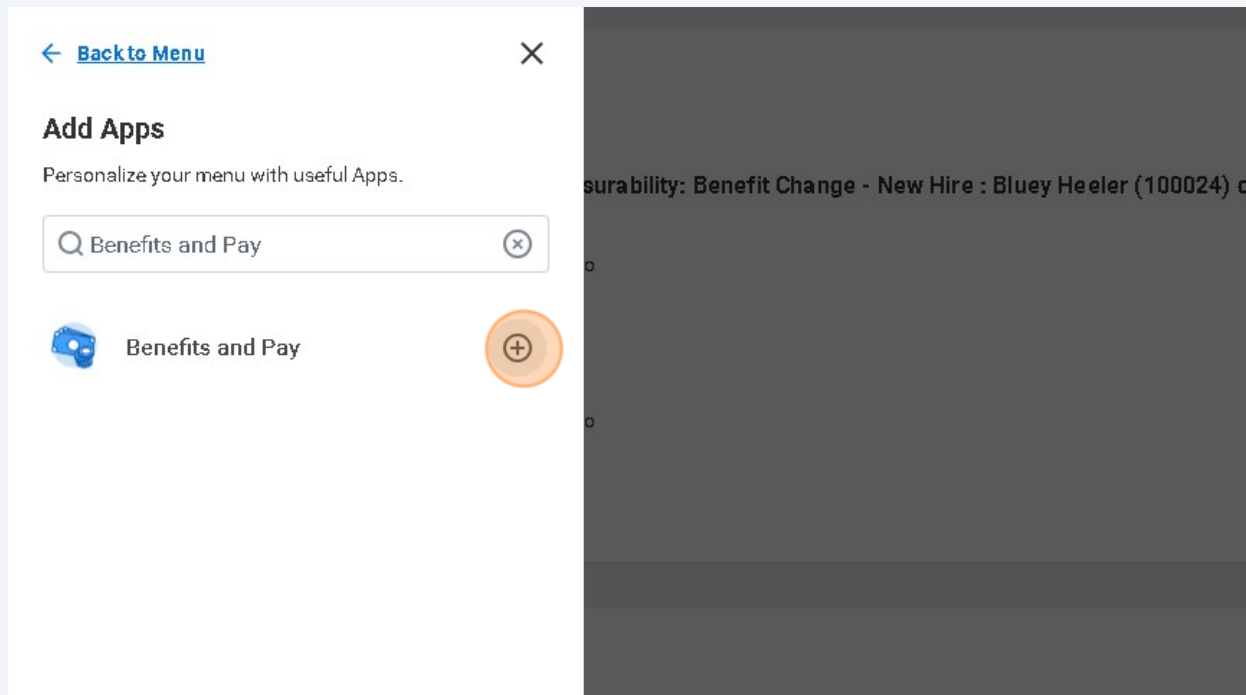
2 Click "Add Apps"



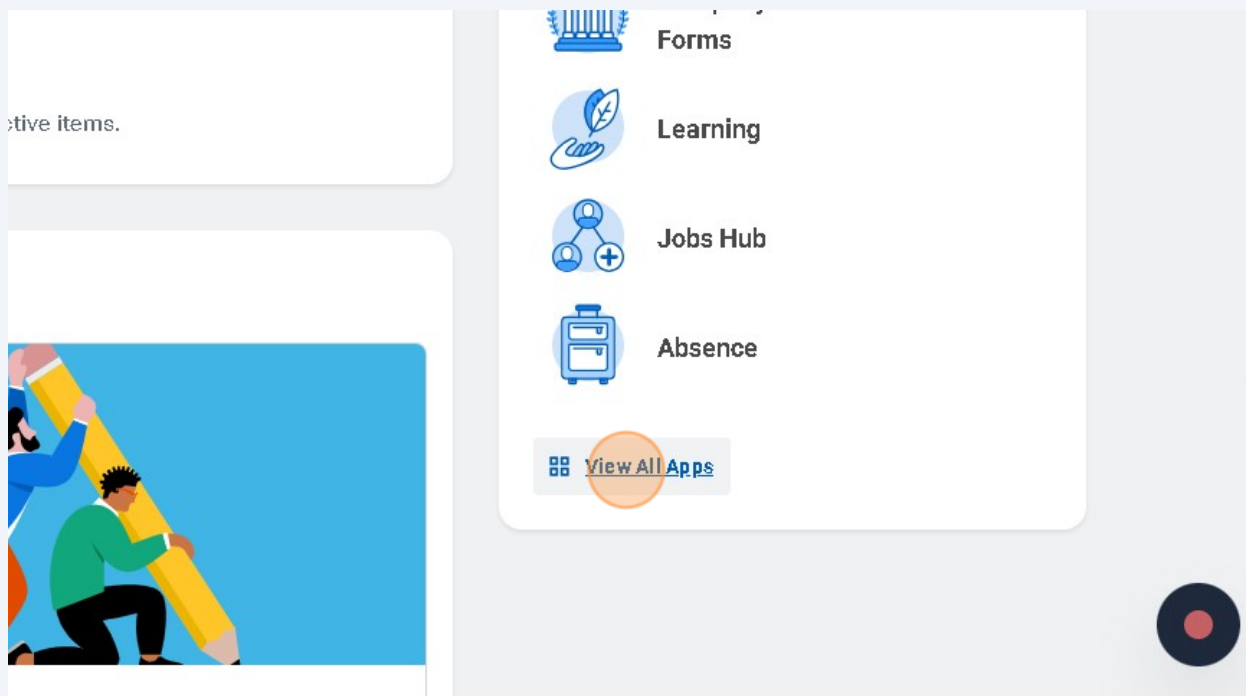
3 Click the "Find Apps" field and search for Benefits



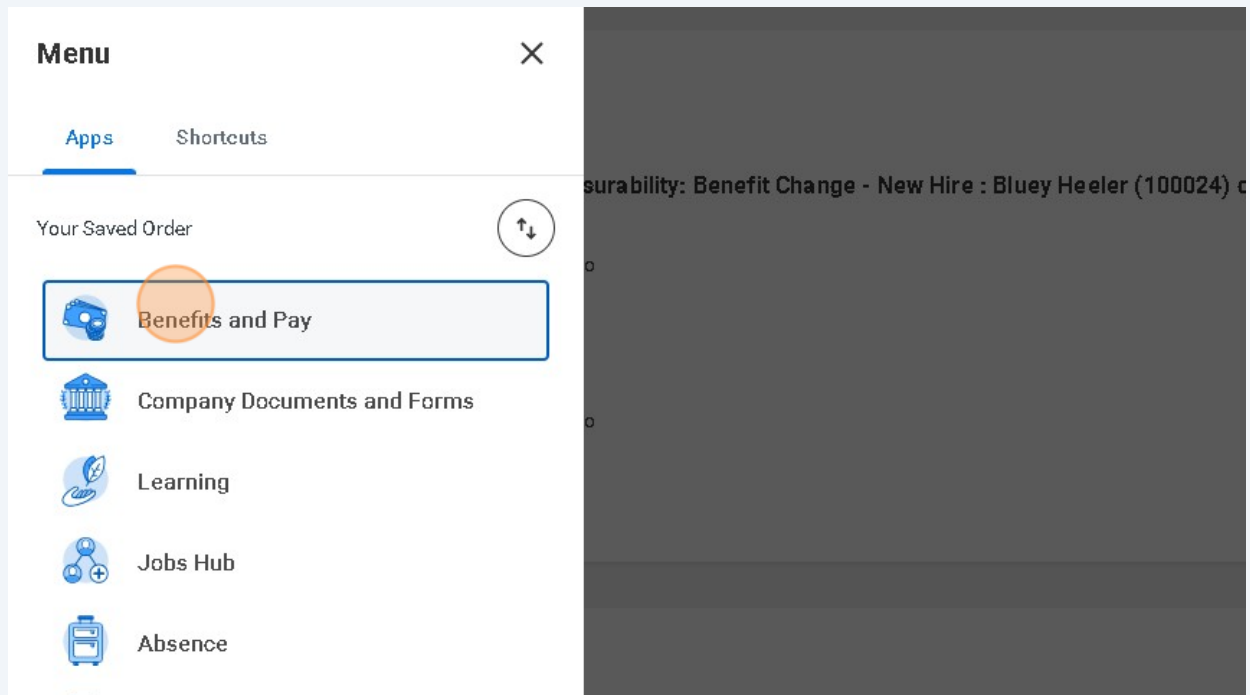
4 Click on the plus icon next to Benefits and Pay



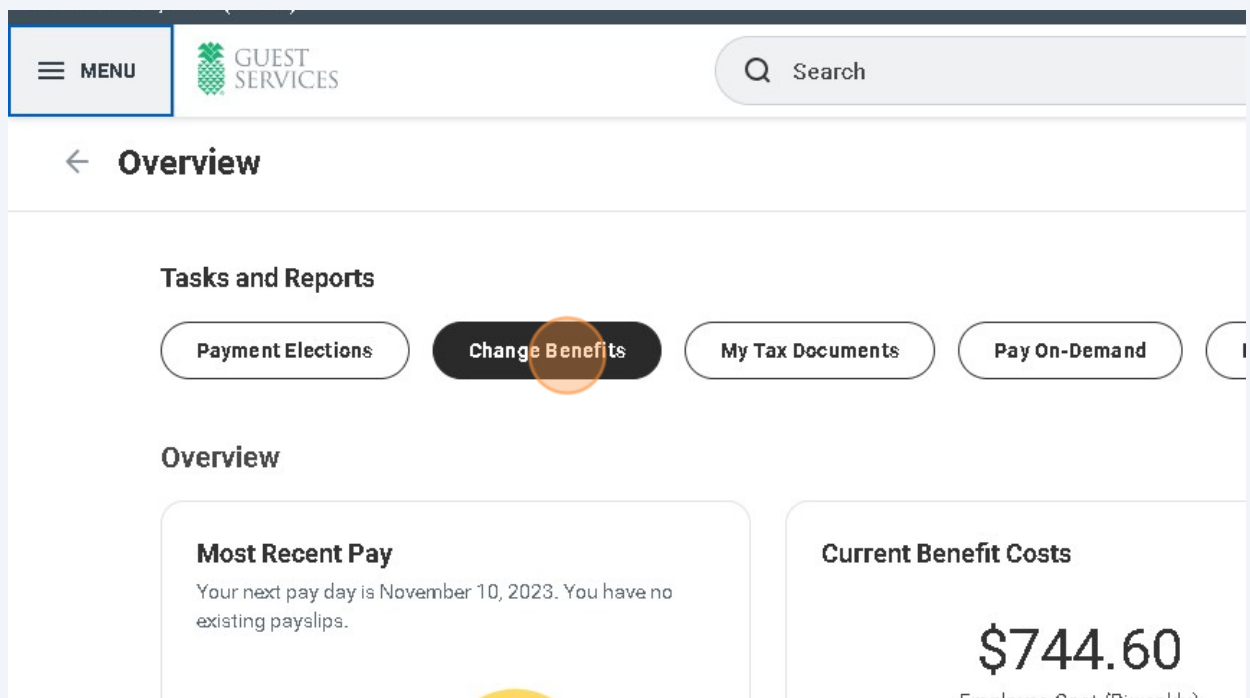
5 Click "View All Apps" again



6 Click on "Benefits and Pay"



7 Click on "Change Benefits"



8 Select Add/Update Beneficiary from the Change Reason drop-down

Change Benefits

Bluey Heeler (100024) ...

Change Reason * select one

- select one
- Add/Update Beneficiary
- Add/Update HSA Contribution
- Add/Update Workplace Giving Program
- Commuter Addition/Change
- Life Event - Birth/Adoption of a Child
- Life Event - Death of Spouse/Child
- Life Event - Divorce
- Life Event - Divorce/Dissolution of

Instruc

SAMPLE INST

Select the app
changes may

Most qualifyir
ting your ever
documentatic
benefit plans
Department.


Note! Before i
Ex-Spouse or
section, selec

9 Click on the calendar icon

Change Benefits

Bluey Heeler (100024) ...

Change Reason * Add/Update Beneficiary

Benefit Event Date * MM/DD/YYYY 

Submit Elections By (empty)

Instruc

SAMPLE INST


Select the app
changes may

Most qualifyir
ting your ever
documentatic
benefit plans
Department.

Note! Before i
Ex-Spouse or
section, selec

10 Choose today's date

Change Reason * Add/Update Beneficiary

Benefit Event Date * MM/DD/YYYY 

Submit Elections By (empty)

May 2024						
SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

SAMPLE INST

Select the app changes may

Most qualifyir ting your ever documentatic benefit plans Department.

Note! Before i Ex-Spouse or section, selec

- Marriage
- Birth/Ad Record:
- Death o
- Divorce
- Employ

11 Click "Submit"


Attachments

Drop files here

or

Select files

enter your comment



Submit Save for Later Cancel

Note! Before in Ex-Spouse or E Change section

- Marriage
- Birth/Ad Records
- Death of
- Divorce/I
- Employe

12 Click "Enroll"

Payment Elections Change Benefits My Tax Documents Open Pay On-Demand

Needs Attention

NOT STARTED
Benefit Event: Add/Update Beneficiary
Submit elections by May 19, 2024.

Enroll

Overview

Most Recent Pay
Your next pay day is November 10, 2023. You have no existing payslips.

Current Benefit Costs

13 Click "Let's Get Started"

be made. Please ensure you review each tile for all the benefit options available to you.


When you are done with your elections, click the **Review and Sign** button to review your final elections and complete the **Electronic**

Initiated On 05/19/2024

Submit Elections By 05/19/2024

Let's Get Started

14 Click "Manage" under Basic Life

Employee)	Included	<div><div></div><div>Basic Life Reliance Standard Life (Employee)</div></div> <div><div>Cost per paycheck</div><div>Included</div></div> <div><div>Coverage</div><div>1 X Salary</div></div> <div><div>Manage</div></div>	Included
	1 X Salary		1 X Salary

15 Click "Confirm and Continue"

(Employee)	<div><div><input checked="" type="radio"/> Select</div><div><input type="radio"/> Waive</div></div>	
------------	---	--

Confirm and Continue

Cancel

16 Click the plus icon under Primary Beneficiaries

Coverage 1 X Salary

Plan cost per paycheck Included

Beneficiaries

▼ Insurance

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Provider Web

Primary Beneficiaries 0 items



+	Beneficiary	Percentage	
	No Data		

Secondary Beneficiaries 0 items



+	Beneficiary	Percentage	
	No Data		

17 Click the "Search" field.

Beneficiaries

▼ Insurance

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Provider Webs

Primary Beneficiaries 1 item



+	Beneficiary	Percentage	
	- Search	0	

Secondary Beneficiaries 0 items



+	Beneficiary	Percentage	
	No Data		

Save

Cancel

18 Click "Add New Beneficiary or Trust"

Plan cost per paycheck Included

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries

	Beneficiary	Percentage
+	Existing Beneficiary Persons	
	Existing Trusts	
	Add New Beneficiary or Trust	
-	Search	

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Save Cancel

19 Click "Continue"

for a beneficiary or beneficiaries.

person or trust?

Cancel

Continue

20 Click the "Relationship" field.

Implementation - guestservices3

On behalf of: Bluey Heeler (100024)

MENU GUEST SERVICES Search

Add New Beneficiary or Trust Bluey Heeler (100024) ⋮

Relationship * ⋮

Use as Beneficiary ☒

Date of Birth 📅

Age (empty)

Gender ⋮

Allow Duplicate Name ☐

21 Select for example "Friend"

Date of Birth

Age

Gender

Allow Duplicate Name

Legal Name Contact Information Legal Government IDs

Country * ⋮

Prefix ⋮

First Name *

Middle Name

Last Name *

☐ Child

☐ Domestic Partner

☐ Ex-Spouse

☐ Ex-Domestic Partner

☐ Parent

☐ Sibling

☐ Other

☒ Friend

☐ Other Relative

22 Enter "First Name"


Allow Duplicate Name ☐

Legal Name

Contact Information

National IDs

Additional Government IDs

Country * × United States of America 

Prefix 

First Name *

Middle Name

Last Name *

Suffix 

OK

Cancel

23 Enter "Last Name"


Allow Duplicate Name ☐

Legal Name

Contact Information

National IDs

Additional Government IDs

Country * × United States of America 

Prefix 

First Name *

Middle Name

Last Name *

Suffix 

OK

Cancel

24 Click "Contact Information"

Use as Beneficiary ☒

Date of Birth

Age (empty)

Gender

Allow Duplicate Name ☐

Legal Name **Contact Information** National IDs Additional Government IDs

Country *

Prefix

First Name *

Middle Name

25 Click "Add" under Address

Allow Duplicate Name ☐

Legal Name **Contact Information** National IDs Additional Government IDs

Phone

Address

26 Enter full address

Country *

Search Address

powered by Google

> Use of Address Lookup

Address Line 1 *

Address Line 2

City *

State *

Postal Code *

27 Click the "Type" field.

State *

Postal Code *

County

Usage

Type *

Primary Work

Primary Home

Use For (empty)

Visibility ☐ Public

Comments

28 Click "Home"

Address Line 2

City *

State * ⋮

Postal Code *

County

Usage

Type * ⋮

Primary Work ☐

Primary Home ☐

Use For (empty)

Visibility

☐ Home

☐ Work

29 Keep defaults if appropriate

Postal Code *

County

Usage

Type * ⋮

Primary Work ☐

Primary Home ☒

Use For ⋮

Visibility

30 Click "OK"

Use For

- × Mailing
- × Street Address

Visibility

Comments

Remove

Add

Email

OK Cancel

31 Click here.

Insurance Instructions

Beneficiary person or trust to this plan. You can also adjust the percentage

Provider Website [Reliance Standard Life](#)

	Percentage
	0

No Data

Cancel

32 Type "100"

33 Click "Save"

Beneficiaries

Insuranc

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Provider Webs

Primary Beneficiaries 1 item



	Beneficiary	Percentage
+		
-	<input type="text" value="Jane Doe"/>	<input type="text" value="100"/>

Secondary Beneficiaries 0 items



	Beneficiary	Percentage
+		
No Data		

Save

Cancel

34 Click "Review and Sign"

Cost per paycheck	Included	Cost per paycheck
Coverage	1 X Salary	Coverage
Manage		Manage

[Review and Sign](#) [Save for Later](#)


35 Check off next to "I Accept"

Your name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information provided.


You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from your earnings the amount of your contribution to the plan. You understand and acknowledge that under the Internal Revenue Code regulations rules, you may not change your benefit election for the plan. You understand that you will not pay income tax or FICA tax on my medical, dental, vision, and Flexible Spending Account contributions. Company-provided life insurance that exceeds \$50,000 may be subject to imputed income.

Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you have had a change of status. If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance, you must request enrollment within 30 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of a life event, provided you request enrollment within 30 days after the marriage, birth or adoption.

I Accept ☐



Process History

 **Bluey Heeler (100024)**
Change Benefits for Life Event- Awaiting Action

36 Click "Submit"

If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance provided you request enrollment within 30 days after your other coverage ends. In addition, if you have a new spouse or dependent as a dependents, provided you request enrollment within 30 days after the marriage, birth or adoption.

I Accept ☒



Process History



Bluey Heeler (100024)

Change Benefits for Life Event- Awaiting Action

Submit

Save for Later

Cancel

37 Click "View Benefits Statement"

MENU



GUEST
SERVICES

Search

Submitted

You've submitted your elections.

View 2024 Benefits Statement

38 Click "Print"

Important: You have Evidence of Insurability pending for a previous enrollment. Your insurance elections may be affected based on

Elected Coverages 2 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Co
Basic AD&D - Reliance Standard Life (Employee)	04/03/2024	04/03/2024	1 X Salary	\$28,0
Basic Life - Reliance Standard Life (Employee)	04/03/2024	04/03/2024	1 X Salary	\$28,0

Beneficiary Designations 2 items

Benefit Plan	Provider Website	Requires Beneficiary	Bene
Basic AD&D - Reliance Standard Life (Employee)	Reliance Standard Life		

Print

39 Click "Download"

s enrollment. Select Print to launch a printable version of this summary for your records.

ty pending for a previous enrollment. Your insurance e at process.

Export Document

Download

Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries
04/03/2024	04/03/2024	1 X Salary	\$28,000.00	
04/03/2024	04/03/2024	1 X Salary	\$28,000.00	Jane Doe