

## STAFF AND FACULTY: BENEFICIARY CHANGE

Follow the steps below to update your beneficiary information in Workday.

1. Open the **Benefits** worklet on your Workday **All About Me** screen and select the **Beneficiaries** link in the **Change** section of the pop-up window:



2. Click **Edit** to make changes to existing beneficiaries and follow directions below:



3. Click the **Contact Information** tab to access phone, address and email details. Click the **Legal Name** or **National IDs** tabs to change other beneficiary information (you are required to enter in any information with an asterisk):

4. Make changes to beneficiary details as needed, then click the **OK** button to save your entries:

**Edit Beneficiary:**  
John Smith 

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

**Phone**

**Add**

 Country Phone Code  

Area Code

Phone Number \*

Phone Extension

Phone Device \*  ▼

Type \*  

Primary Work

Primary Home

Use For  

Visibility  Public

Comments

Shared With John Smith 

Change for this Contact only  
 Change for all Contacts above

**Address**

**Add**

 Effective Date \* 12/17/2013  
Country \* United States of America  
Address Line 1 222 SW Forest Lane  
Address Line 2

**OK** Cancel

5. Click the **Close** button to continue:

**Edit Beneficiary Confirmation:**  
**John Smith** ▾ Actions

You have successfully saved the following beneficiary information.

Beneficiary ID BENEFICIARY\_PERSON-6-97  
 Related to Worker ▾ Jane Smith  
 Relationship \* Spouse  
 Inactive Date  
 Date of Birth \* 05/04/1972  
 Age 41 years, 7 months, 16 days  
 Gender \* Male  
 Citizenship Status Citizen (United States of America)  
 Full-time Student  
 Student Status Start Date  
 Student Status End Date  
 Disabled

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

Country \* United States of America  
 Prefix  
 First Name \* John  
 Middle Name  
 Last Name \* Smith  
 Suffix  
 Enter Western Script

**Close**

**Note:** You can also add beneficiaries. Click **Add** and complete the required fields noted by an asterisk.

6. Click the **All About Me** link at the top of the screen to close the beneficiary change screen:

Implementation - lewisandclark2 Implementation - lewisandclark2 **All About Me** Common Search

workday Jane Smith | My Account | Sign Out

Beneficiaries:  
**Jane Smith** ▾ Actions

**Add**

Beneficiary	Relationship	
▾ John Smith	Spouse	<b>Edit</b> <b>Delete</b>