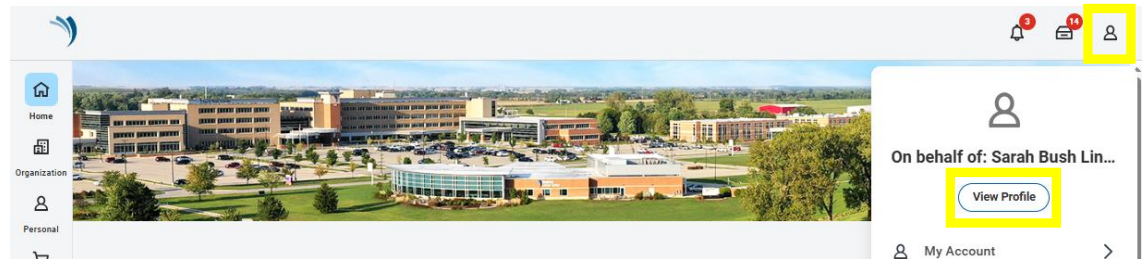


## Updating Your Beneficiary

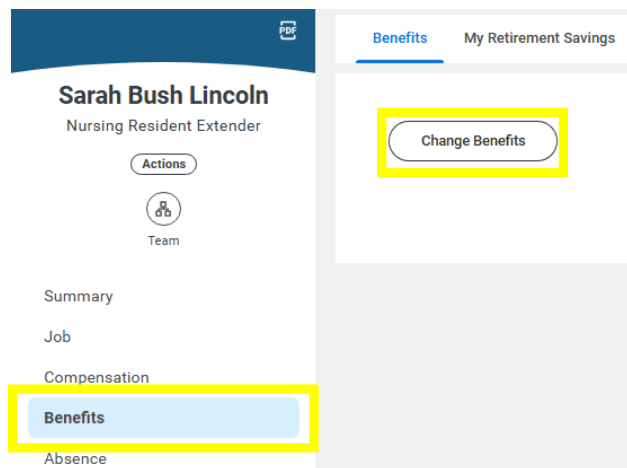
### Employee User Guide

#### 1. Getting Started

- a. In the top right corner of Workday, click on your 'Picture', then click 'View Profile'



- b. On the left hand side, click 'Benefits', then click 'Change Benefits'



- c. Choose 'Beneficiary Change', enter the date of change in 'Benefit Event Date' (usually today's date), & click 'Submit' at the bottom

Change Reason \* ☐ Adoption

☒ Beneficiary Change

☐ Birth

☐ Death of Dependent

☐ Divorce

☐ Employee/Dependent Gains Other Coverage

☐ Employee/Dependent Loses Other Coverage

☐ HSA Contribution Change

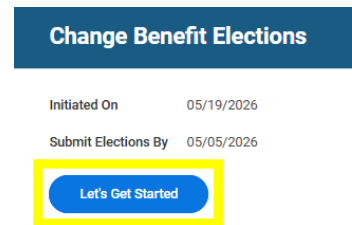
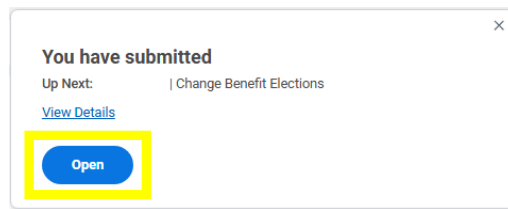
☐ Marriage

Benefit Event Date

Submit Elections By 05/05/2026

Benefits Offered [Basic AD&D](#)  
[Basic Life](#)  
[Voluntary AD&D - Employee](#)  
[Voluntary Life - Employee](#)

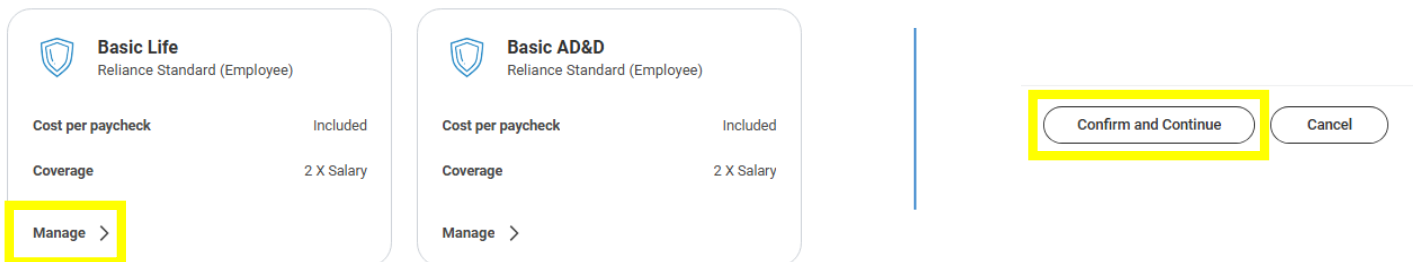
- d. In the pop-up window, click 'Open', then click 'Let's Get Started'



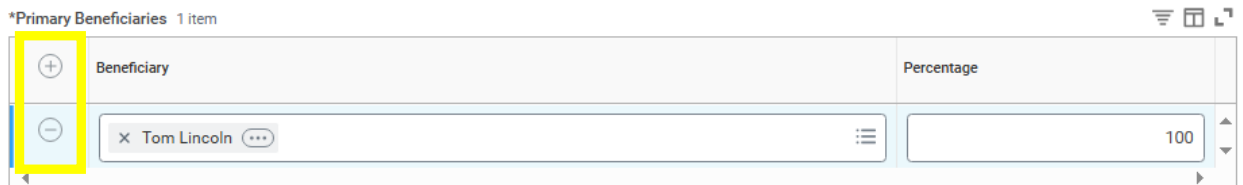
## 2. Update Beneficiary

- a. In the plan(s) that you want to update the Beneficiary, click 'Manage' & on the next screen click 'Confirm and Continue'

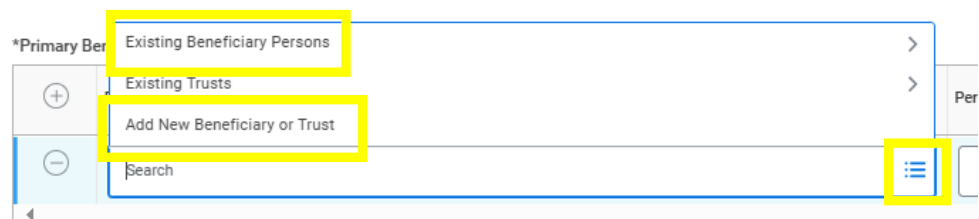
### Insurance



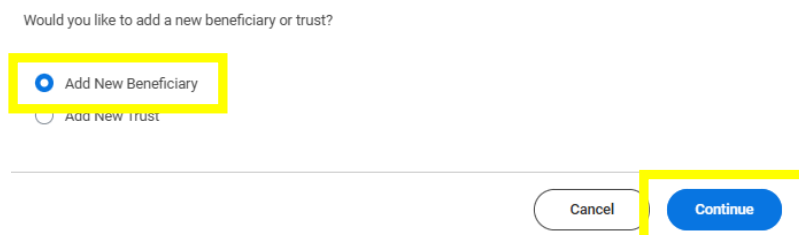
- b. On this page, you will be able to:
- Add a new beneficiary: click the '+' icon
  - Remove an existing beneficiary: click the '-' icon



- c. After clicking '+' icon the new row is added, click on the 3 Lines.
- If you want to use a Beneficiary you have already created, select the 'Existing Beneficiary Persons' and select the name you want to add.
  - If you want to add a new Beneficiary, select 'Add New Beneficiary or Trust'.



- d. Select 'Add New Beneficiary' and click 'Continue'



- e. Complete the required information (indicated by red asterisks). Once finished, click 'OK'
- i. NOTE: some info will be found in the tab sections

**Add New Beneficiary or Trust** Sarah Bush Lincoln ...

Relationship \*

Use as Beneficiary

☒

Date of Birth

MM/DD/YYYY

Age

(empty)

Sex at Birth

Allow Duplicate Name

☐

Legal Name
Contact Information
National IDs
Additional Government IDs
Other IDs

Country \*

✕
United States of America

- f. Once the Beneficiary is added, you can either add additional ones, or complete the Percentage allocation. The total percentage will need to add up to 100:

#### Example: (1) Beneficiary

\*Primary Beneficiaries 1 item

|  | Beneficiary                                              | Percentage                       |
|--|----------------------------------------------------------|----------------------------------|
|  | <span>✕</span> <span>Tom Lincoln</span> <span>...</span> | <input type="text" value="100"/> |

#### Example: (2) Beneficiaries

\*Primary Beneficiaries 2 items

|  | Beneficiary                                              | Percentage                      |
|--|----------------------------------------------------------|---------------------------------|
|  | <span>✕</span> <span>Sally Smith</span> <span>...</span> | <input type="text" value="50"/> |
|  | <span>✕</span> <span>Tom Lincoln</span> <span>...</span> | <input type="text" value="50"/> |

- g. Click 'Save' once complete.

### 3. Reviewing Your Elections

- a. Once you have completed all your changes, click on the 'Review and Sign' button at the bottom of the page

#### Insurance

**REVIEWED**  
**Basic Life**  
Reliance Standard (Employee)

|                   |            |
|-------------------|------------|
| Cost per paycheck | Included   |
| Coverage          | 2 X Salary |

Manage >

Review and Sign

Save for Later

- b. Review your 'Selected' & 'Waived' benefits at the top of the page to ensure your beneficiaries are correct

Selected Benefits 3 items

|                              |
|------------------------------|
| Plan                         |
| Basic Life                   |
| Reliance Standard (Employee) |
| Basic AD&D                   |
| Reliance Standard (Employee) |
| Voluntary Life - Employee    |
| Reliance Standard (Employee) |

Waived Benefits 1 item

- c. After you have reviewed your elections, scroll down to review the 'Legal Notice' & once you are ready to submit:

- i. Checkmark the 'I Accept' box

- Each year, during the annual enrollment period, you w
- If you decline medical insurance enrollment for yours if you have a new spouse or dependent as a result of

I Accept ☒

- ii. Click 'Submit'

Submit

Save for Later

Cancel