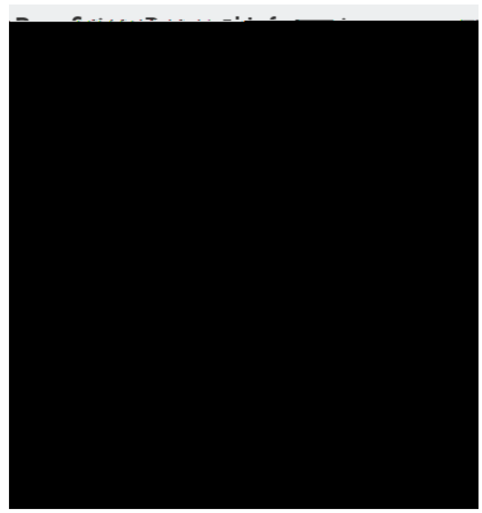
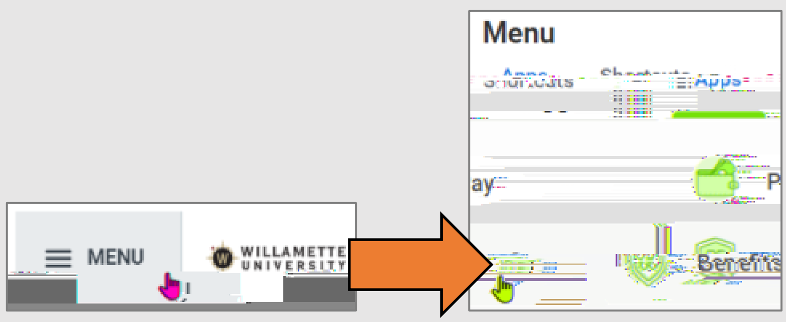
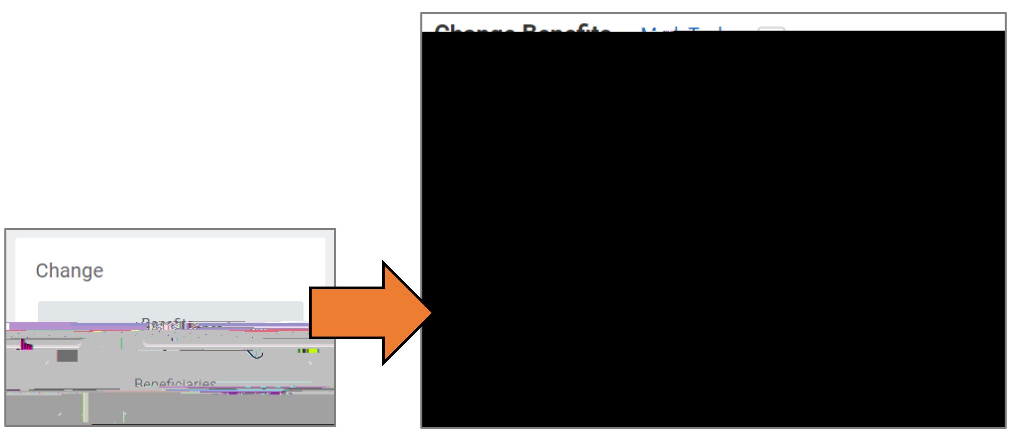
Introduction

4.	In the following example, we are proceeding by selecting **Create a New Beneficiary**. A similar process would be involved in creating a new trust. For that option you enter the name of the trust instead of an individual person. After selecting **Create a New Beneficiary** and **OK**, you will be presented with a list of information to provide about your beneficiary. Click the edit pencil in each field to enter information. You are only required to enter the beneficiary name and relationship to you, but we <u>highly suggest</u> entering as much information as possible, particularly contact information. The more information entered, the easier it will be for your beneficiary to make a claim. Gathering the information prior to creating the beneficiary will be helpful.	 [redacted]
5.	When done, click Submit and move on to assigning your beneficiary to benefit plans.	

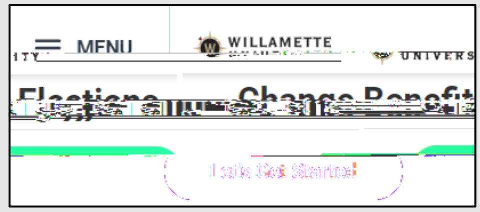
Assigning a Beneficiary to a Benefit Plan

1.	Go back to the Workday home page, click **Menu** and then **Benefits** from the resulting drop down.	
2.	Click **Benefits** under Change. On the resulting screen select **Beneficiary Change** and enter the effective date. Click **Submit**.	 [redacted]

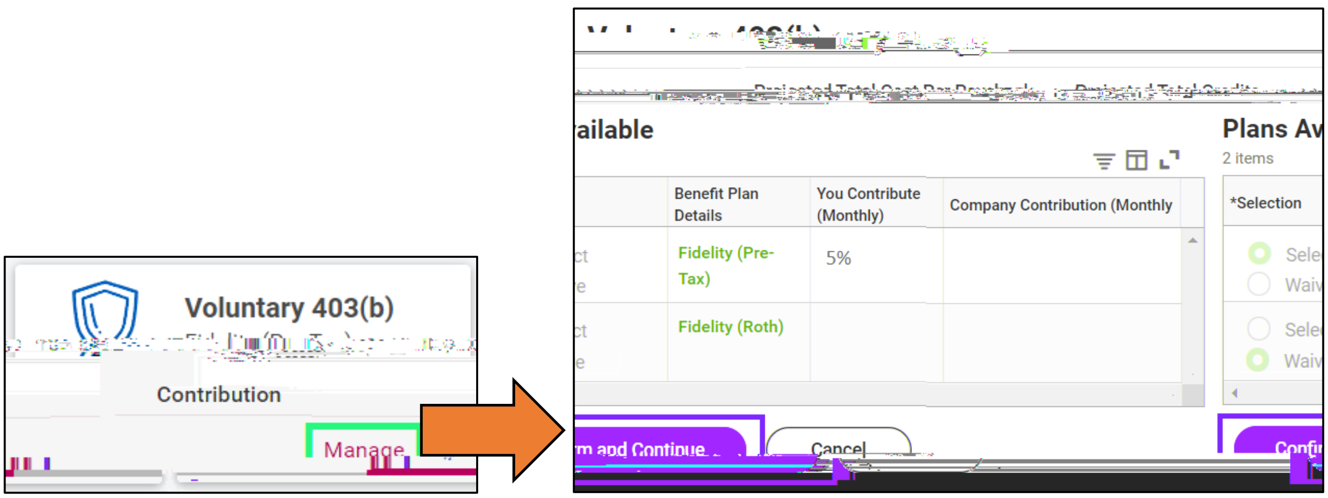
3. A pop-up box will appear. Click **Open** to proceed adding beneficiaries to particular benefit plans.

[redacted]

4. On the subsequent screen, click **Let's Get Started**. You will be presented with tiles representing each of the benefits you have chosen.



5. In this example, we will add a beneficiary to the Voluntary 403(b) plan. Click Manage. On the following screen, you are presented with a summary of the benefit. To add a beneficiary, click **Confirm and Continue**.



6. Click the plus symbol under Primary Beneficiaries. Click the menu icon from within the name field, select Existing Beneficiary Persons, and then select the name of the beneficiary you wish to enter.

[redacted]