### Benefits: Beneficiary Designation Change – Life and AD&D

## Employee

# Beneficiary designation changes can be made any time in Workday at

myworkday.com/wday/authgwy/maritz/login.htmld.

- 1. From the Home page, click the **Benefits and Pay** application. If it is not showing in **Your Top Apps**, click **View All Apps**.
- 2. Click Change Benefits under Tasks and Reports.
- Click the drop-down menu next to Change Reason and select Beneficiary Designation – Life and AD&D.
- 4. Provide today's date for the Event Date.
- 5. Click Submit, then click Open.

You have sub	mitted
Up Next: 04/08/2023	Change Benefit Elections   Due Date
View Details	
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(If you are unable to complete the task immediately, you can access it any time in your Workday inbox.)

### 6. Click Let's Get Started.

#### **Change Benefit Elections**



- 7. Click **Manage** on the benefit tile(s) that you want to update and click **Confirm and Continue**.
  - Beneficiary designation changes must be made separately for each benefit. Updating the beneficiary for one benefit (e.g., Basic Life) will not update your beneficiary designation(s) for any other benefit(s).
  - You cannot make enrollment or plan changes from this event.

- To make beneficiary changes to your 401k, go to rps.troweprice.com.
- Click the (-) to remove a current Beneficiary. Click the (+) to add a Beneficiary and a box will appear.
- **9.** Click in the blank box and select Existing Beneficiary Persons to see if the person you want to designate is already listed.

If the person **is** listed, click their name and it will be added as a beneficiary. You will then need to assign them a designation percentage, such as 100 if you only have one beneficiary.

If the person **is not** listed, click the back arrow next to "Existing Beneficiary Persons" and click **Add New Beneficiary or Trust**. Click Continue and provide all required information on the Legal Name and Contact Information tabs and click OK. Put in the percentage, such as 100.

- If you are listing more than one Primary Beneficiary, repeat this process until the total percentage for all Primary Beneficiaries is equal to 100.
- Secondary Beneficiaries are not required. If you want to add a secondary beneficiary, click the (+), click into the box that appears, and follow the instructions in Step 9.

10. Click Save to return to the main benefits tile page.

- Repeat Steps 7 9 for all applicable benefit tiles.
- 11. Carefully Review your new beneficiary designation(s).
  - To go back to the main benefits tile menu, click **Cancel**.
- **12.** Click **Review and Sign** when you have changed the beneficiary designation(s) for every Life and AD&D benefit(s) you want to update.
- **13.** When finished, scroll down to click the **electronic signature box** no hand-written signature is required.
- 14. Click Submit and you should see "You've submitted your elections."
  - Click Done or
  - Click View Benefits Statement to View/Print your beneficiaries.
    - Click Print and then click Download for a PDF document.

