

Workday: How to Designate or Change Your Beneficiary(ies) for Life Insurance

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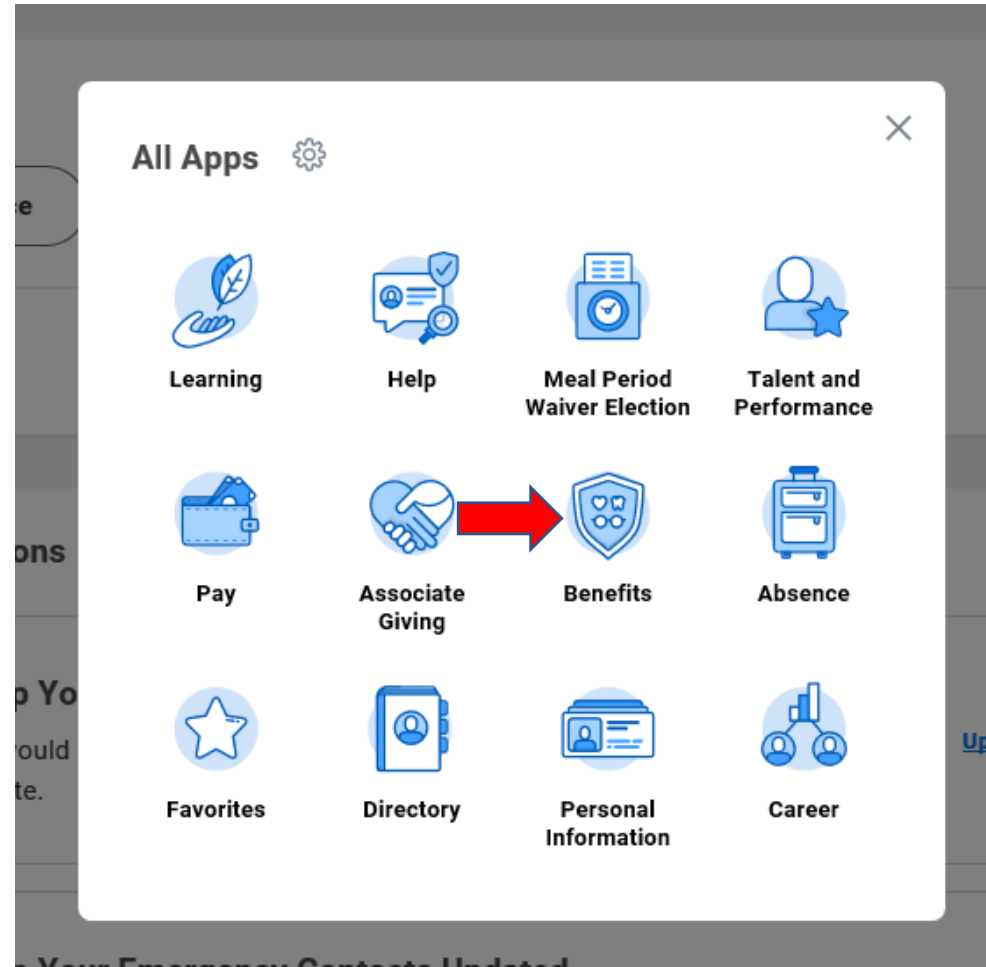
What is a Life Insurance Beneficiary?

A life insurance beneficiary is a person who receives the life insurance payout from your CHOC policy when you die. You may designate or change a beneficiary at any time in Workday. Beneficiary designations will become effective as of the date you choose as the Event Date in the request in Workday. The Event Date must be the current date or a future date. It cannot be a retroactive date.

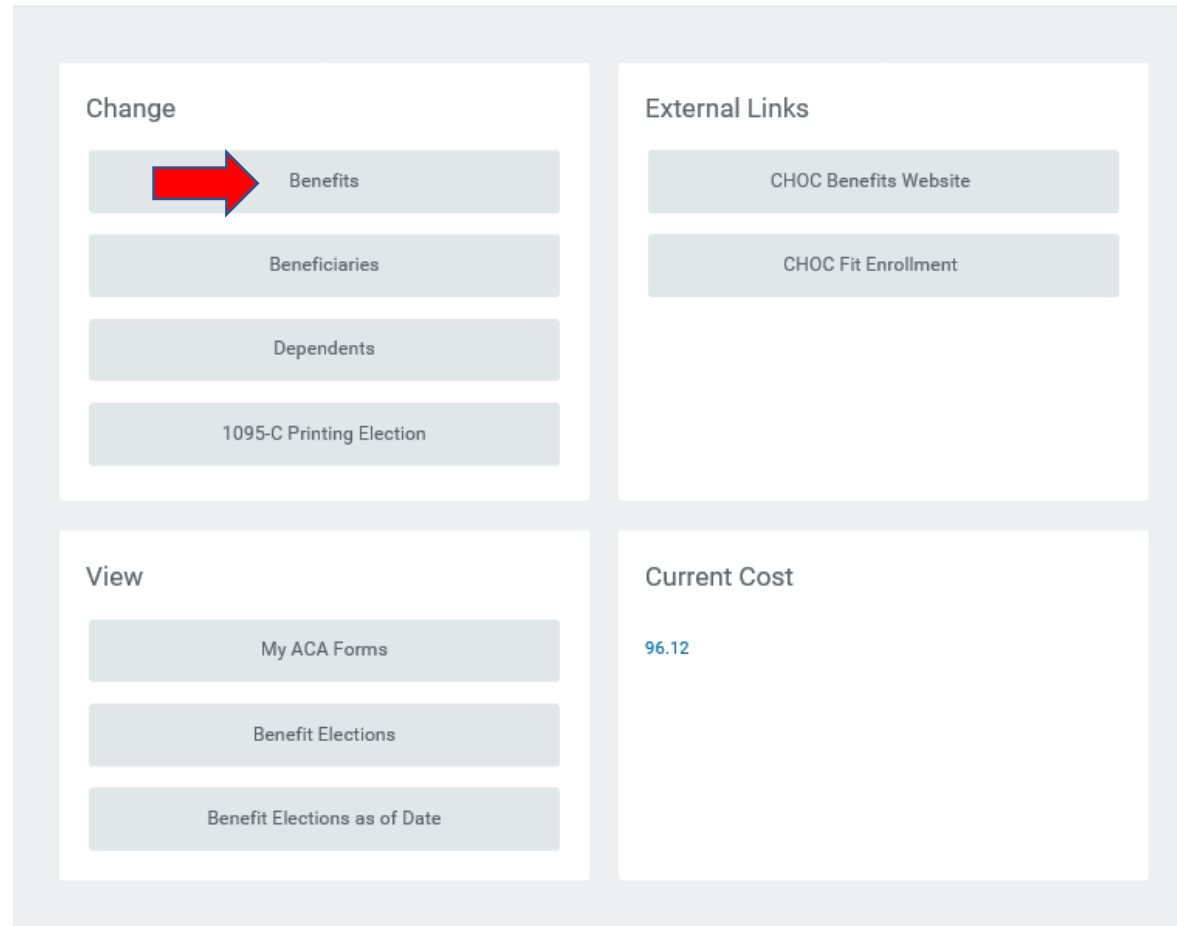
How to Add or Change Your Beneficiary(ies) for Life Insurance in Workday



Step 1: Navigate to your Workday Home Page and click “View All Apps”.



Step 2: Click Benefits under the column Change.





The screenshot displays a user interface with four main sections arranged in a 2x2 grid:

- Change:** A vertical list of four buttons: "Benefits" (highlighted with a red arrow), "Beneficiaries", "Dependents", and "1095-C Printing Election".
- External Links:** A vertical list of two buttons: "CHOC Benefits Website" and "CHOC Fit Enrollment".
- View:** A vertical list of three buttons: "My ACA Forms", "Benefit Elections", and "Benefit Elections as of Date".
- Current Cost:** A single line of text displaying the value "96.12".

Step 3: Select a Change Reason, enter the Event Date, and click Submit.

Change Benefits Choco Bear (100123) ⋮

Change Reason * 

Benefit Event Date * 


Submit Elections By 03/03/2022


Benefits Offered
Basic AD&D
Basic Life
Optional Employee Life

Attachments

Drop files here

or





Step 4: Click “Open”

The screenshot shows a 'Benefits' page with a modal window. The modal is titled 'Success! Event submitted' and contains the text 'Up Next: Choco Bear, Change Benefit Elections' and a link 'View Details'. A red arrow points to a blue 'Open' button on the page. The page layout includes sections for 'Change', 'View', and 'Current Cost'.

Benefits

Change

- Beneficiaries
- Dependents
- 1095-C Printing Election

View

- My ACA Forms
- Benefit Elections
- Benefit Elections as of Date

Current Cost

96.12

CHOC Fit Enrollment

Success! Event submitted

Up Next: Choco Bear, Change Benefit Elections

[View Details](#)

Open

Step 5: Click “Let’s Get Started”

Inbox

Actions Archive

Viewing: All Sort By: Newest

Benefit Change - Beneficiary Change : Choco Bear (100123) on 02/16/2022
5 minute(s) ago - Effective 02/16/2022

Change Benefit Elections

☆ 📅 PDF ⚙️ 🗨️

5 minute(s) ago - Effective 02/16/2022

Initiated On 02/16/2022

Submit Elections By 03/18/2022

Let's Get Started ←

Step 6: Click Manage under the insurance policy you wish to change.

Beneficiary Change

Projected Total Cost Per Paycheck
\$15.37

Projected Total Credits
\$0.00

Insurance



Basic Life
The Hartford (Employee)

Cost per paycheck Included
Coverage 1 X Salary



[Manage](#)



Basic AD&D
The Hartford (Employee)

Cost per paycheck Included
Coverage 1 X Salary

[Manage](#)



Optional Employee Life
The Hartford (Employee)

Cost per paycheck \$15.37
Coverage \$370,000

[Manage](#)

Step 7: Click “Confirm and Continue”

Basic Life

Projected Total Cost Per Paycheck
\$15.37

Projected Total Credits
\$0.00

Plans Available

1 item

*Selection	Benefit Plan	You Pay (Biweekly)	Company Contribution (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	The Hartford (Employee)	Included	\$0.99



Confirm and Continue

Cancel



Step 8: Click the Plus (+) icon.

Basic Life - The Hartford (Employee)

Projected Total Cost Per Paycheck \$15.37 Projected Total Credits \$0.00

Coverage

Calculated Coverage \$50,000.00


Coverage 1 X Salary


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 0 items



	Beneficiary	Percentage
No Data		

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Insurance Instructions

Beneficiary Designation

To find information about CHOC Benefits Plans and Programs go to:
<http://benefits.choc.org/>

Step 9: If your beneficiary is not listed under Existing Beneficiary Persons, select Add New Beneficiary or Trust

Basic Life - The Hartford (Employee)

Projected Total Cost Per Paycheck \$15.37 Projected Total Credits \$0.00

Coverage


Calculated Coverage \$50,000.00
Coverage 1 X Salary
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 Beneficiary

Existing Beneficiary Persons	>	Percentage
Existing Trusts	>	0
Add New Beneficiary or Trust		



Secondary Beneficiaries 1 item

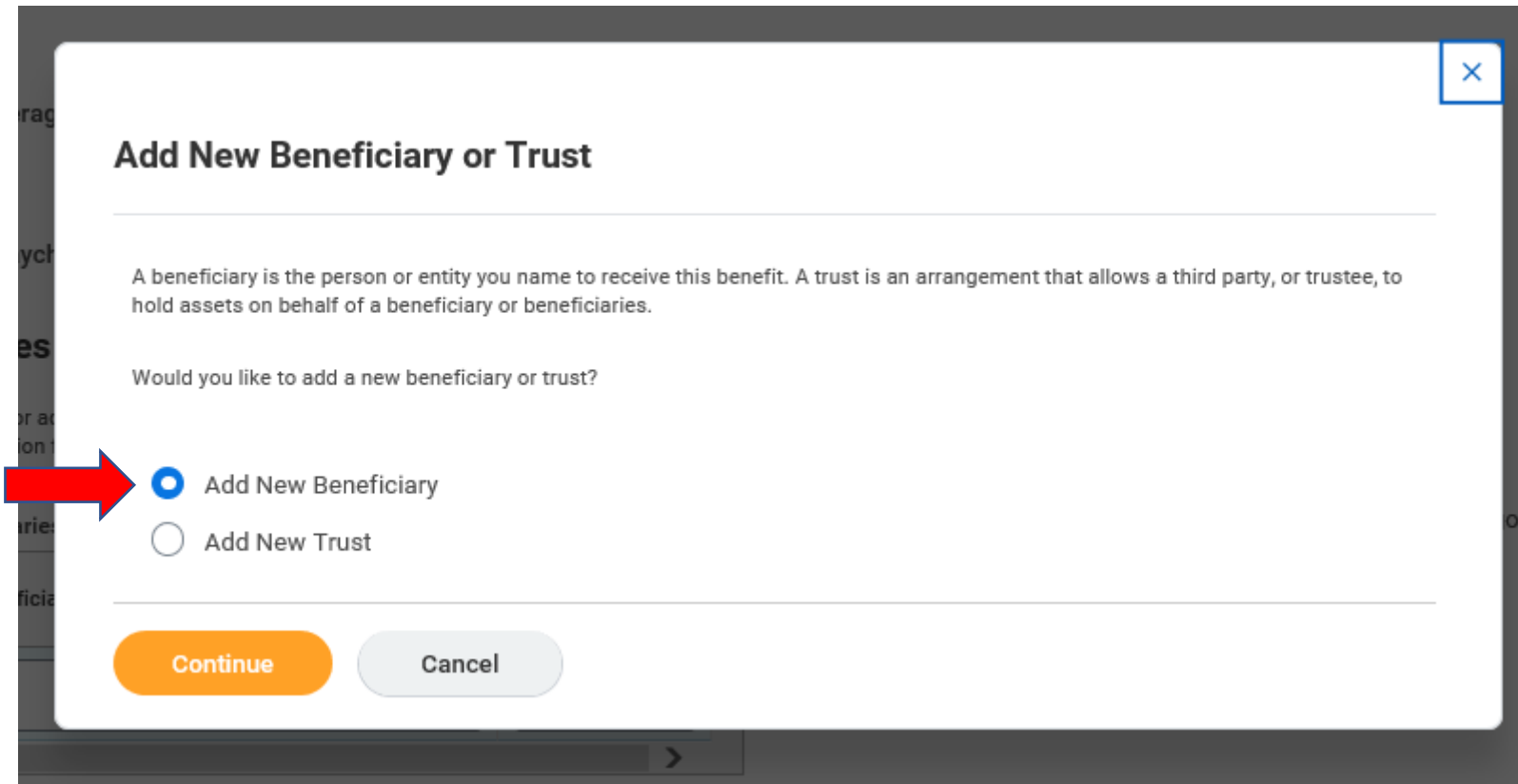
Beneficiary	Percentage
	0

Insurance Instructions

Beneficiary Designation

To find information about CHOC Benefits Plans and Programs go to: <http://benefits.choc.org/>

Step 10: Click “Add New Beneficiary”



Add New Beneficiary or Trust

A beneficiary is the person or entity you name to receive this benefit. A trust is an arrangement that allows a third party, or trustee, to hold assets on behalf of a beneficiary or beneficiaries.

Would you like to add a new beneficiary or trust?

Add New Beneficiary

Add New Trust

Continue Cancel

Step 11: Enter all the required fields with an asterik (*)

Add New Beneficiary or Trust Choco Bear (100123) ⋮

Relationship * ⋮

Use as Beneficiary

Date of Birth 📅

Age 31 years, 1 months, 15 days

Gender ▼

Allow Duplicate Name

Legal Name Contact Information National IDs Additional Government IDs

Country * ⋮

Prefix ⋮

First Name *

Middle Name

Last Name *

Suffix ⋮

Click through the tabs to fill out any required information such as SSN, home address, etc.



Then, click "Ok".



Step 12: Enter the percentage allocation under Percentage and click Submit.

Basic Life - The Hartford (Employee)

Projected Total Cost Per Paycheck \$15.37
Projected Total Credits \$0.00

Coverage

Calculated Coverage \$50,000.00

Coverage 1 X Salary

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 1 item

	Beneficiary	Percentage
+		
-	Choco Bear	100

Insurance Instructions

Beneficiary Designation

To find information about CHOC Benefits Plans and Programs go to: <http://benefits.choc.org/>

Enter the percentage amount.

Secondary Beneficiaries 1 item

	Beneficiary	Percentage
+		
-		0

Then, click "Submit".



Save Cancel



Step 13: Click “Review and Sign”

CHOC Search Get the Workday Mobile App Your Organization ID: choc

Beneficiary Change

Projected Total Cost Per Paycheck
\$15.37

Your Basic Life changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

Insurance

Policy Name	Provider	Cost per paycheck	Coverage	Manage
Basic Life	The Hartford (Employee)	Included	1 X Salary	Manage
Basic AD&D	The Hartford (Employee)	Included	1 X Salary	Manage
Optional Employee Life	The Hartford (Employee)	\$15.37	\$370,000	Manage

Review and Sign **Save for Later**

Step 13: Review your beneficiary designation under View Summary. Then, scroll to the bottom of the page

Total Benefits Cost 1 item

Company Contribution	Employee Cost	Credits	Net Cost
\$1.22	\$15.37	\$0.00	\$15.37

Attachments

Drop files here

or

Select files

Electronic Signature

I acknowledge that I have been given the opportunity to enroll myself and/or eligible dependents in my employer's benefits plans. I hereby authorize CHOC Children's to take any applicable deductions from my salary with regard to these benefits plans, including applying any start, stop, increase, decrease or change in deduction amount.

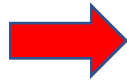
I Accept

enter your comment

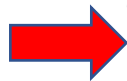
Process History

Choco Bear (100123)
Change Benefits for Life Event - Awaiting Action

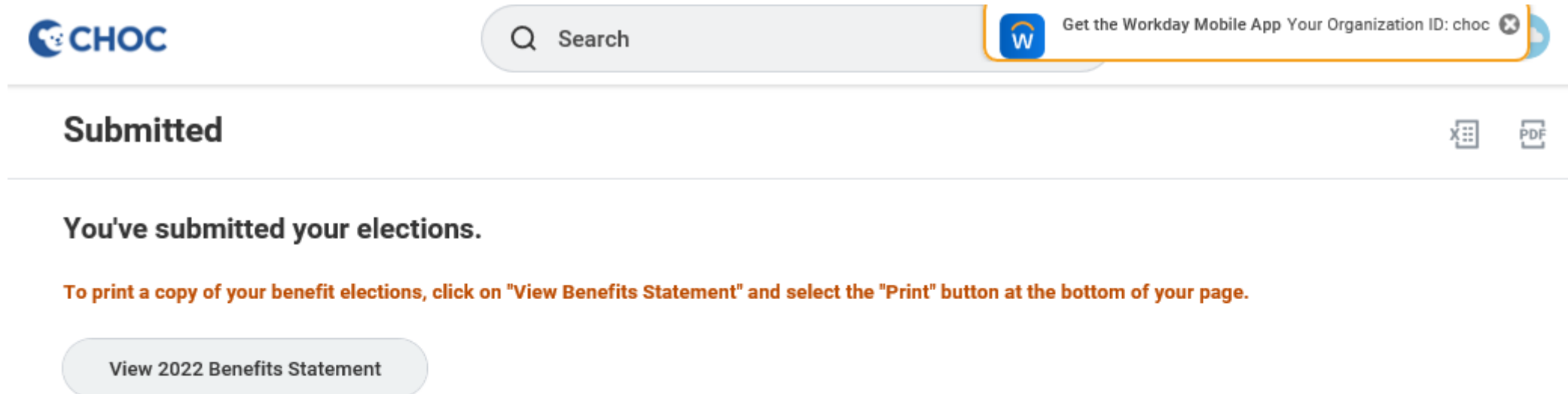
Click the "I Accept" box to acknowledge.



Then, click "Submit".



Step 13: Congratulations! You have completed designating your beneficiary(ies).



The screenshot shows the CHOC Workday portal interface. At the top left is the CHOC logo. To its right is a search bar with a magnifying glass icon and the text 'Search'. Further right is a notification banner for the Workday Mobile App with the text 'Get the Workday Mobile App Your Organization ID: choc' and a close button. Below the navigation bar, the word 'Submitted' is displayed in a large, bold font. To the right of 'Submitted' are two icons: a grid icon and a PDF icon. Below this, the text 'You've submitted your elections.' is shown. Underneath is a line of orange text: 'To print a copy of your benefit elections, click on "View Benefits Statement" and select the "Print" button at the bottom of your page.' At the bottom of the screenshot is a light blue button with the text 'View 2022 Benefits Statement'.

LONG LIVE CHILDHOOD

Have Questions or Need Help?
Submit a Workday- Benefit Elections
Help Case

