

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

Table of Contents

What is a Life Insurance Beneficiary?.....	3
How to Add Your Beneficiary(ies) for Life Insurance	4-11
How to Designate or Change Your Beneficiary(ies) for Life Insurance	12-29
Need Help?.....	30

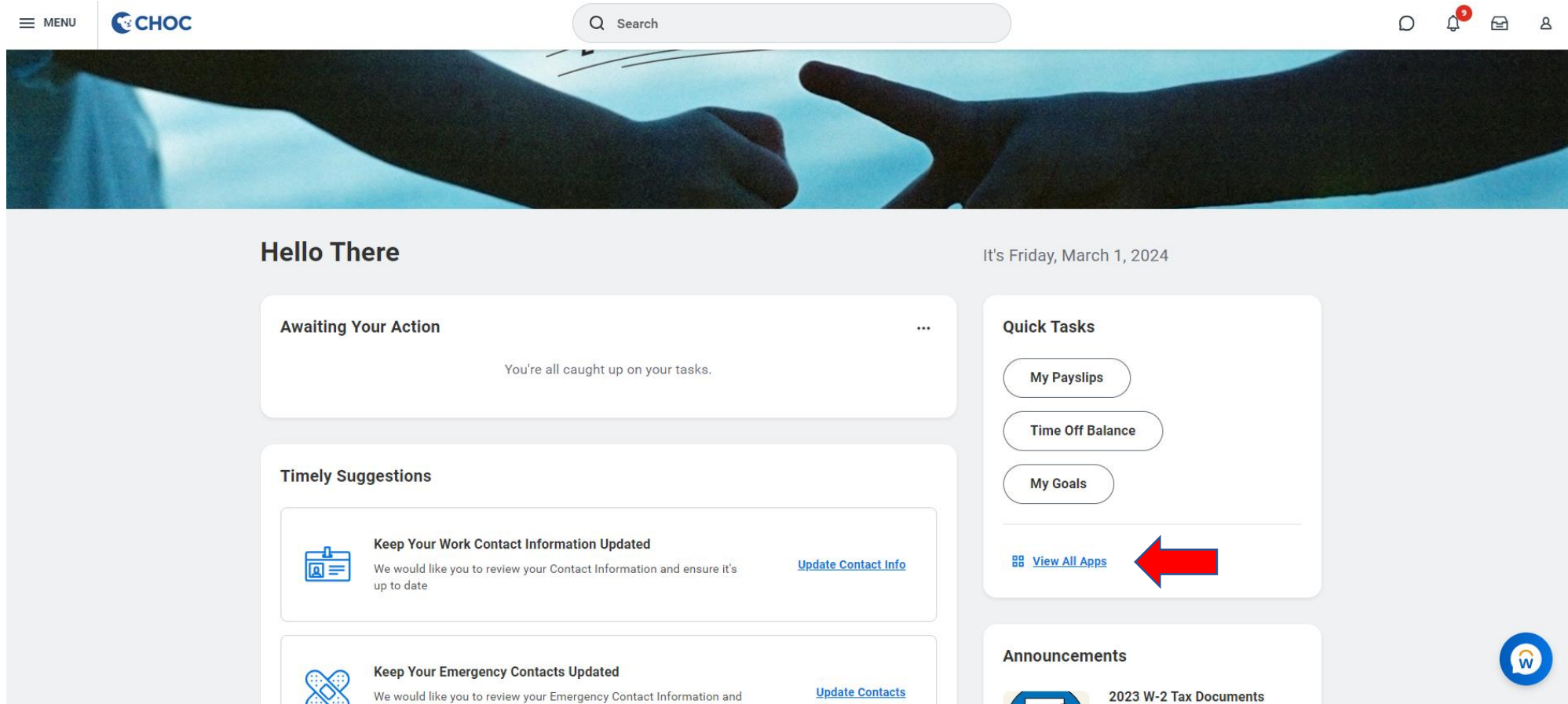
What is a Life Insurance Beneficiary?

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 Your Beneficiary(ies) for Life Insurance in Workday



Navigate to your Workday Home Page and click “View All Apps”



Click the “Benefits and Pay” app

The image shows a web application interface. On the left, there is a 'Menu' sidebar with a close button (X) at the top. The sidebar has two tabs: 'Apps' (selected) and 'Shortcuts'. Below the tabs, there is a section titled 'Your Saved Order' with a refresh icon. A list of app icons is shown, with a red arrow pointing to the 'Benefits and Pay' app. At the bottom of the sidebar are 'Add Apps' and 'Edit' buttons. The main dashboard on the right is dimmed and shows a search bar, a header with the date 'It's Friday, March 1, 2024', and several content cards including 'Quick Tasks' (My Payslips, Time Off Balance, My Goals), 'Suggestions' (Keep Your Work Contact Information Updated, Keep Your Emergency Contacts Updated), and 'Announcements' (2023 W-2 Tax Documents).

Click “Benefits” and then click “Beneficiaries”

The screenshot displays the CHOC employee benefits portal. The top navigation bar includes a menu icon, the CHOC logo, a search bar, and notification icons. The left sidebar menu is expanded to show the 'Benefits and Pay' section, with 'Overview' selected. Two red arrows point to the 'Benefits' and 'Beneficiaries' items in the sidebar. The main content area shows an 'Overview' dashboard with several key metrics and sections:

- Tasks and Reports:** Includes links for [Payment Elections](#), [Change Benefits](#), and [My Tax Documents](#).
- Most Recent Pay:** Shows a take-home pay of **\$0.00** for March 7, 2024. Includes a link to [View Most Recent Pay](#).
- Deductions:** Shows a total of **\$0.00** from the most recent payslip.
- Current Benefit Costs:** Shows an employee cost of **\$352.44** (biweekly). Includes a link to [View Benefit Details](#).
- Compensation History:** Summarizes changes over time:
 - EFFECTIVE: 04/18/2021:** 0.36 USD Hourly Market Adjustment
 - EFFECTIVE: 07/01/2018:** 0.66 USD Hourly Merit
 - EFFECTIVE: 06/18/2017:** 22.06 USD Hourly Conversion
- Bonus & One-Time Payments:**
 - PAID: 07/27/2023:** Non Cash Taxable Gift/Bonus \$20.00
 - PAID: 03/10/2022:** Service Award \$175.00
 - PAID: 11/05/2020:** Remote Worker Stipend \$800.00
- Annual Total Rewards Package:** A summarization of the annual Total Rewards package.



Click "Add"

The screenshot displays the CHOC system interface. At the top left, there is a 'MENU' button and the CHOC logo. A search bar is located at the top center. On the right side of the top bar, there are icons for chat, notifications (with a red '9' badge), mail, and user profile. The left sidebar contains a navigation menu with categories: 'Benefits and Pay' (selected), 'Overview', 'Benefits' (expanded), 'Pay', 'Compensation', and 'Suggested Links'. Under 'Benefits', the 'Beneficiaries' option is highlighted with a blue bar and a checkmark. The main content area shows the 'Beneficiaries' section for 'Choco Bear (99999)'. It features an 'Add' button, which is pointed to by a red arrow. Below the button, it says 'none entered'. On the right side of the main content area, there are icons for a calendar and a PDF document. In the bottom right corner, there is a circular chat icon with a white 'W' on a blue background.

To add an existing dependent: Click “Existing Dependent or Emergency Contact ”



Add My Beneficiary

 Existing Dependent or Emergency Contact 

Create a New Beneficiary

Create a New Trust as Beneficiary

Click on drop-down menu to search for an existing dependent.



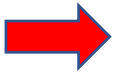
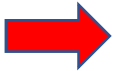
Then, click “OK”



To create a new beneficiary: Click “Create a New Beneficiary”

Add My Beneficiary

- Existing Dependent or Emergency Contact [input field]
- Create a New Beneficiary
- Create a New Trust as Beneficiary



OK Cancel



Then, click “OK”

Enter all the required fields with an asterisk (*)

≡ MENU | CHOC | Search | [Icons: Home, Notifications (3), Mail, Profile)]

Add My Beneficiary Choco Bear (99999) [More] [PDF]

Beneficiary Personal Information

Legal Name

Legal Name *
(empty) [Edit]

Relationship

Relationship *
(empty) [Edit]

Date of Birth

Date of Birth
(empty) [Edit]

Gender

Gender
(empty) [Edit]

Contact Information

Primary Address

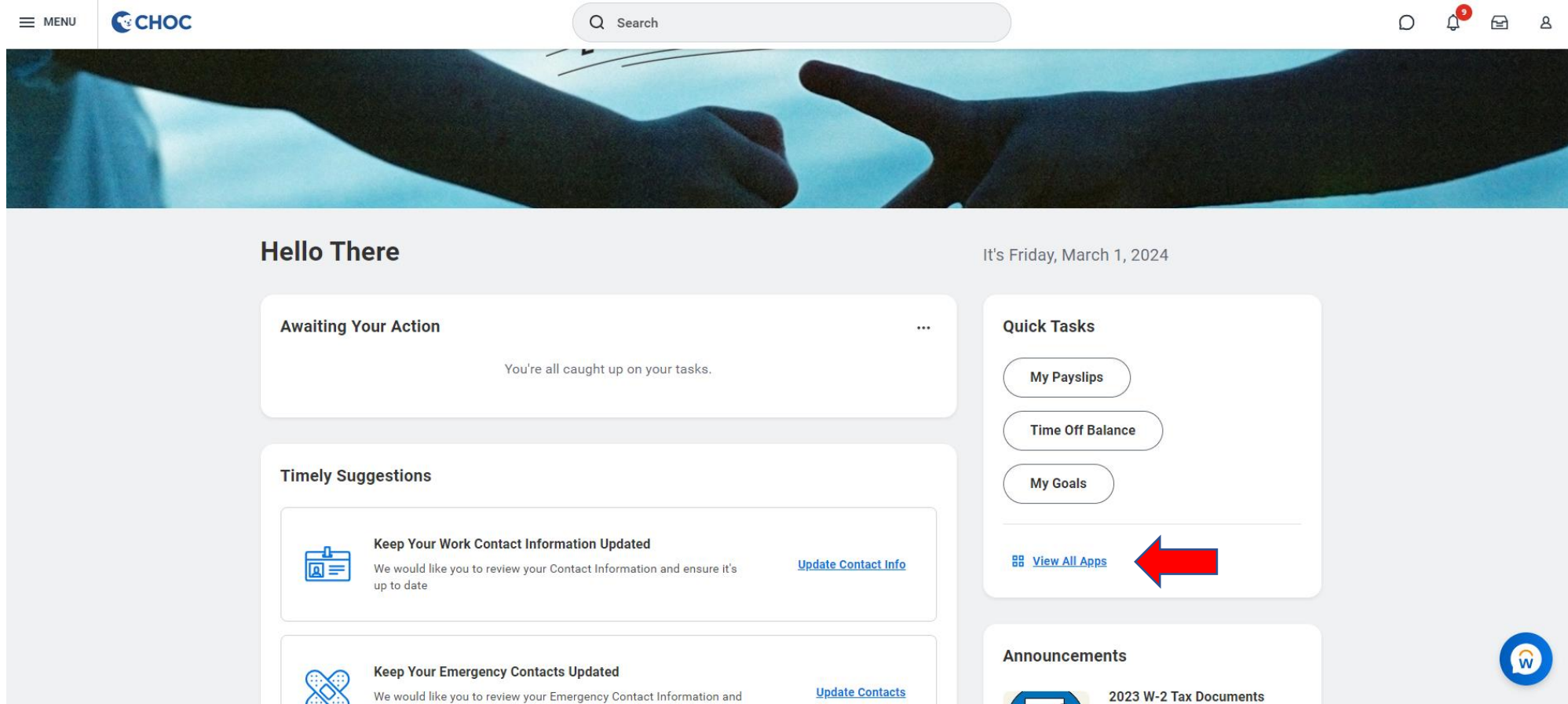
[Submit] [Save for Later] [Cancel] [WhatsApp]

Then, click "Submit".

How to Designate or Change Beneficiary(ies) for your Life Insurance in Workday



Navigate to your Workday Home Page and click “View All Apps”



Click the “Benefits and Pay” app

The image shows a web application interface. On the left, there is a 'Menu' sidebar with a close button (X) at the top. The sidebar has two tabs: 'Apps' (selected) and 'Shortcuts'. Below the tabs, there is a section titled 'Your Saved Order' with a refresh icon. A list of app icons is shown, with a red arrow pointing to the 'Benefits and Pay' app. At the bottom of the sidebar are 'Add Apps' and 'Edit' buttons. The main content area on the right is dimmed. It features a search bar at the top, a navigation bar with a chat icon, a notification bell with a '9' badge, an envelope icon, and a user profile icon. The main content includes a header with the text 'Afternoon, On Behalf of: Choco Bear' and the date 'It's Friday, March 1, 2024'. Below this are sections for 'Your Action' (with a message 'You're all caught up on your tasks.'), 'Quick Tasks' (with buttons for 'My Payslips', 'Time Off Balance', and 'My Goals'), 'Suggestions' (with a card for 'Keep Your Work Contact Information Updated' and a link 'Update Contact Info'), and 'Announcements' (with a card for 'Keep Your Emergency Contacts Updated' and a link 'Update Contacts'). A 'View All Apps' link is also visible.

Click “Change Benefits”

The screenshot displays the CHOC employee portal interface. At the top, there is a navigation bar with a 'MENU' icon, the CHOC logo, a search bar, and notification icons. The left sidebar contains a 'Benefits and Pay' section with sub-links for Overview, Benefits, Pay, and Compensation, along with suggested links for CHOC Benefits Web... and CHOC Fit Enrollment. The main content area is titled 'Tasks and Reports' and features three links: 'Payment Elections', 'Change Benefits' (highlighted with a red arrow), and 'My Tax Documents'. Below this is an 'Overview' section with several cards: 'Most Recent Pay' showing \$0.00 for Take Home Pay; 'Deductions' showing \$0.00 Total; 'Current Benefit Costs' showing \$352.44 Employee Cost (Biweekly); 'Compensation History' listing three entries with effective dates and amounts; and 'Bonus & One-Time Payments' listing three entries with paid dates and amounts. A 'View Most Recent Pay' link is also present.

Tasks and Reports

[Payment Elections](#) [Change Benefits](#) [My Tax Documents](#)

Overview

Most Recent Pay
Your next pay day is March 7, 2024.

\$0.00
Take Home Pay

Gross Pay \$0.00

[View Most Recent Pay](#)

Deductions
Taxes and deductions from your most recent payslip.

\$0.00
Total

Current Benefit Costs

\$352.44
Employee Cost (Biweekly)

[View Benefit Details](#)

Compensation History
Summary of your compensation changes over time.

- EFFECTIVE: 04/18/2021
↑ 0.36 USD Hourly Market Adjustment
- EFFECTIVE: 07/01/2018
↑ 0.66 USD Hourly Merit
- EFFECTIVE: 06/18/2017
↑ 22.06 USD Hourly Conversion

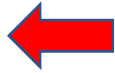
Bonus & One-Time Payments

- PAID: 07/27/2023
Non Cash Taxable Gift/Bonus \$20.00
Non Cash Taxable Gift/Bonus
- PAID: 03/10/2022
Service Award \$175.00
Service Award
- PAID: 11/05/2020
Remote Worker Stipend \$800.00

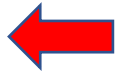
Step 3: Select Change Reason: “Beneficiary Change”

Change Benefits Choco Bear (99999) ⋮

Change Reason * Beneficiary Change ▾



Benefit Event Date * 03/01/2024 📅



Use today's date for the Benefit Event Date

Instructions

If you are electing a Divorce/Separation event, you first must change your spouse/domestic partner to ex-spouse/domestic partner under the Dependents page. Please use this [link](#) to make this change.

Submit Elections By 03/31/2024

Benefits Offered
Basic AD&D
Basic Life
Optional Employee Life

Attachments

Drop files here

or

Select files

enter your comment

📎



Submit

Save for Later

Cancel

Then, click “Submit”



Click "Open"

MENU



Search



Benefits and Pay



Overview



Benefits



Pay



Compensation



Suggested Links



CHOC Benefits Web...



CHOC Fit Enrollment



Tasks and Reports

[Payment Elections](#) Ch

You have submitted

Up Next: Choco Bear | Change Benefit Elections

[View Details](#)

Open



Needs Attention

NOT STARTED

Benefit Event: Beneficiary Change

Submit elections by March 31, 2024.

Enroll

Overview

Most Recent Pay

Your next pay day is March 7, 2024.

\$0.00

Take Home Pay

Gross Pay

\$0.00

Deductions

Taxes and deductions from your most recent payslip.

\$0.00

Total

Current Benefit Costs

\$352.44

Employee Cost (Biweekly)

[View Benefit Details](#)



Click “Let’s Get Started”

☰ MENU



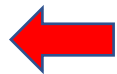
Change Benefit Elections







Initiated On 03/01/2024

Submit Elections By 03/31/2024



Let's Get Started



Click “Manage” under the insurance policy you wish to add a Beneficiary





MENU  Search 9   

Beneficiary Change

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

Insurance

 Basic Life The Hartford (Employee)	 Basic AD&D The Hartford (Employee)	 Optional Employee Life Waived REVIEWED
Cost per paycheck: Included	Cost per paycheck: Included	
Coverage: 1 X Salary	Coverage: 1 X Salary	
 Manage	Manage	Enroll

[Review and Sign](#) [Save for Later](#)



Click “Confirm and Continue”

Basic Life

Projected Total Cost Per Paycheck
\$0.00

Projected Total Credits
\$0.00

Plans Available

1 item

Benefit Plan	*Selection	You Pay (Biweekly)	Company Contribution (Biweekly)
The Hartford (Employee)	<input checked="" type="radio"/> Select <input type="radio"/> Waive	Included	\$0.37



Confirm and Continue

Cancel



Click the Plus (+) icon

Basic Life - The Hartford (Employee)

Projected Total Cost Per Paycheck \$0.00 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>



Save

Cancel

If your beneficiary is not listed under “Existing Beneficiary Persons”

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/>

Select “Add New Beneficiary or Trust”

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

Enter all the required fields with an asterisk (*)

Add New Beneficiary or Trust Choco Bear (99999) ⋮

Relationship * ⋮ 

Use as Beneficiary

Date of Birth 

Age (empty)


Gender ⋮

Allow Duplicate Name

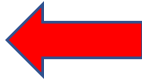
Legal Name Contact Information National IDs Additional Government IDs

Country * ⋮


Prefix ⋮

First Name * 

Middle Name

Last Name * 

Suffix ⋮



Click on the “Contact Information” tab to enter the required information such as an address.

Then, click “Ok”.

Enter the percentage allocation under Percentage

Basic Life - The Hartford (Employee)

Projected Total Cost Per Paycheck
\$0.00

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
+		
-	<input type="text" value="Willy Wonka"/>	<input type="text" value="100"/>

Secondary Beneficiaries 1 item

	Beneficiary	Percentage
+		
-	<input type="text"/>	<input type="text" value="0"/>

Insurance Instructions

Beneficiary Designation

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

← Enter the percentage amount.

Then, click "Save".



Save Cancel





Repeat the same process for the other life insurance cards.


MENU CHOC Search

Beneficiary Change






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

Insurance

 Basic Life The Hartford (Employee) UPDATED	 Basic AD&D The Hartford (Employee)	 Optional Employee Life Waived REVIEWED
Cost per paycheck Included	Cost per paycheck Included	
Coverage 1 X Salary	Coverage 1 X Salary	Enroll
Manage	Manage 	

[Review and Sign](#) [Save for Later](#) 




Click “Review and Sign”

MENU     

Beneficiary Change

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

Insurance

 Basic Life The Hartford (Employee) UPDATED	 Basic AD&D The Hartford (Employee) UPDATED	 Optional Employee Life Waived REVIEWED
Cost per paycheck: Included	Cost per paycheck: Included	
Coverage: 1 X Salary	Coverage: 1 X Salary	Enroll
Manage	Manage	



Review and Sign

Save for Later



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 Credits
\$0.55	\$0.00	\$0.00	\$0.00

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

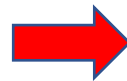
enter your comment

Process History

 Choco Bear (99999)
Change Benefits for Life Event - Awaiting Action



Click the "I Accept"
box to acknowledge.



Then, click
"Submit".



Congratulations! You have completed designating your beneficiary(ies)

≡ MENU



🔍 Search

Submitted

You've submitted your elections.

To print a copy of your benefit elections, click on "View Benefits Statement" and select the "Print" button at the bottom of your page.

[View 2024 Benefits Statement](#)

LONG LIVE CHILDHOOD

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

