

Change Beneficiary - Add or Remove

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PURPOSE

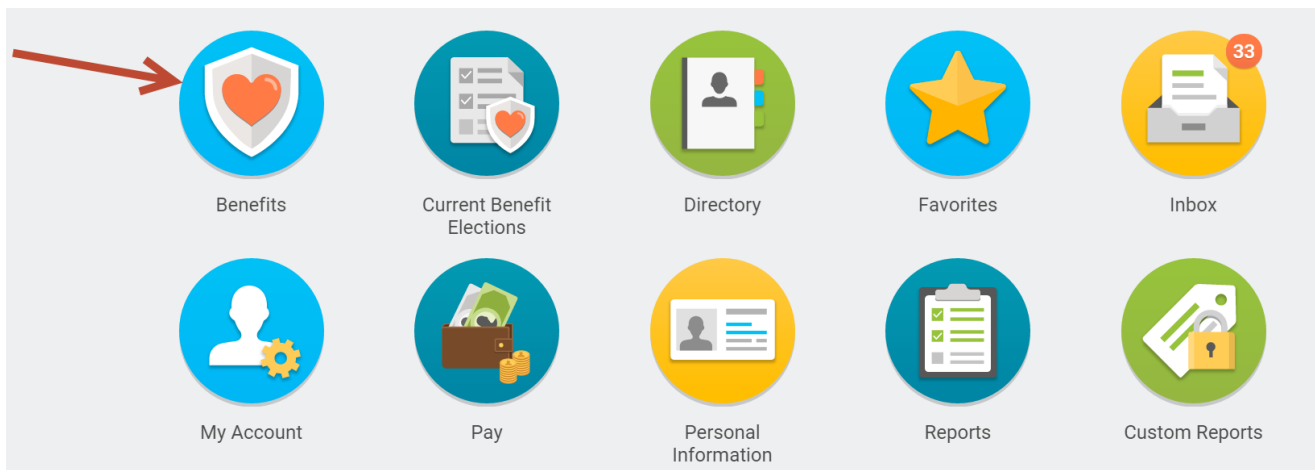
This is for employees to add or remove beneficiaries that are listed for them in the Employee Work Center.

LOG IN TO THE EMPLOYEE WORK CENTER

1. The Employee Work Center can be accessed from this page, <http://link.nebraska.gov/>.
2. Type your User Name, press tab and then type your password.
3. Click **Sign In** (or press Enter).

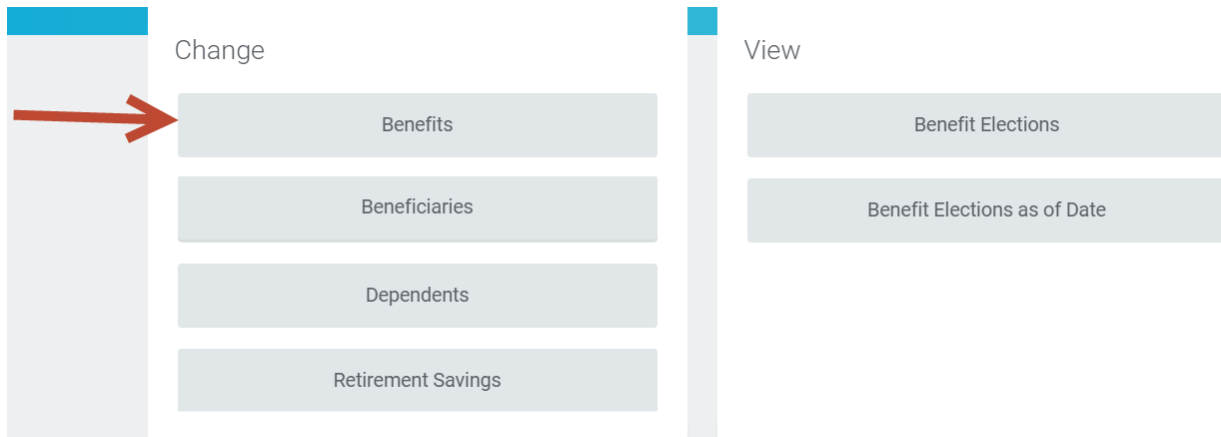
INITIATE A LIFE EVENT TO START THE CHANGE BENEFICIARY PROCESS

1. Click the Benefits icon on the Home Page.



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2. Click Benefits from the Change column.



3. Click the **Benefit Event Type** dropdown and select **Beneficiary Change** from the list.

The image shows the 'Change Benefits' form. The 'Benefit Event Type' dropdown is open, showing a list of options: 'Add or Decrease Life Insurance', 'Beneficiary Change', 'Birth of a Child / Adoption', 'Dependent Gain of State Employee Group Coverage', and 'Dependent Loss of State Employee Group Coverage'. A red arrow points to the 'Beneficiary Change' option. The 'Benefit Event Date' dropdown is also open, showing 'select one'. The 'Submit Elections By' field is empty. The 'Enrollment Offering Types' field is empty. The 'Attachments' section shows '0 items'. The 'Comment' field is empty and contains the text 'No Data'.

4. Enter the Benefit Event Date. Notes: 1) The current date will be used for the Benefit Event Date for a Beneficiary Change. 2) Do not enter a date in the Submit Elections By field. This date will automatically populate with the last day the event can be opened.

The image shows the 'Change Benefits' form with the 'Benefit Event Date' field populated with '11 / 20 / 2015'. A red arrow points to the date field. The 'Benefit Event Type' dropdown is set to 'Beneficiary Change'. The 'Submit Elections By' field is populated with '12/19/2015'. The 'Enrollment Offering Types' field is populated with 'Optional Supplemental Life', 'Basic Life', and 'Accidental Death and Dismemberment (AD&D)'.

5. Click Submit at the bottom of the page.

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CHANGE BENEFICIARY (ADD OR REMOVE)

Once a life event has been initiated, the event will need to be completed.

1. Click **Open**.

The screenshot shows the Workday interface. At the top, there is a search bar and the Workday logo. A blue notification bar states: "You have submitted Benefit Event: [redacted] on 11/20/2015". Below this, the "Up Next" section features a "Change Benefit Elections" card with a radio button icon and a text input field. A red arrow points to the "Open" button on this card. To the right, the "Do Another" section has a "Change Benefits" link.

2. No changes can be made on the first page of this process. It displays the active life insurance plans.
3. Click **Continue** at the bottom of the page.

Event Date 11/20/2015
Initiated On 11/20/2015
Submit Elections By 12/19/2015

Total Employee Net Cost/Credit
\$0.00 Semi-monthly Cost

This page is informational showing the Life Insurance Enrollments you are able to change beneficiaries and beneficiary designation amounts. No changes can be made on this page, you must click the continue button on the bottom to move to the next page.

> Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 3 items

	Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents	Calculated Coverage	Employee Cost (Semi-monthly)	Employer Contribution (Semi-monthly)	Provider Website
	Basic Life - Aetna Full Time (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$20,000		\$20,000.00		\$0.48	Aetna
	Optional Supplemental Life - Aetna 0.5 - 5X Salary (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive						Aetna
	Accidental Death and Dismemberment (AD&D) - Aetna AD&D - State (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive						Aetna



Continue Save for Later Cancel

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4. On the next screen, the options are:
 - a. Click the Minus Sign to remove a beneficiary (continue to the Remove a Beneficiary section), OR
 - b. Click the Plus Sign to add a beneficiary (continue to the Add a Beneficiary section).

Beneficiary Designations 3 items

Benefit Plan	Provider Website	Requires Beneficiary	Beneficiaries	
			*Beneficiary	*Primary Percentage / Contingent Percentage
Optional Supplemental Life - Aetna 0.5 - 5X Salary (Employee)	Aetna	<input checked="" type="checkbox"/>	+	
			-	SI <input type="radio"/> Primary Percentage 0 <input checked="" type="radio"/> Contingent Percentage 40
			-	Mc <input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0
			-	Ry <input type="radio"/> Primary Percentage 0 <input checked="" type="radio"/> Contingent Percentage 20
			-	Sk <input type="radio"/> Primary Percentage 0 <input checked="" type="radio"/> Contingent Percentage 40
Accidental Death and Dismemberment (AD&D) - Aetna AD&D - State (Employee)	Aetna	<input checked="" type="checkbox"/>	+	
			-	S <input type="radio"/> Primary Percentage 0 <input checked="" type="radio"/> Contingent Percentage 20
			-	S <input type="radio"/> Primary Percentage 0 <input checked="" type="radio"/> Contingent Percentage 40
			-	S <input type="radio"/> Primary Percentage 0 <input checked="" type="radio"/> Contingent Percentage 40

REMOVE A BENEFICIARY

1. Click **Continue** on the Change Benefit Elections page.
2. When the beneficiary disappears from the list, click Continue at the bottom of the page. Note: At least one beneficiary is required. Another beneficiary will need to be added to continue (click the Plus sign and continue to the Add a Beneficiary section) OR click Cancel to not remove that beneficiary. If the removal is canceled, a message box will display prompting to either Discard Changes or Continue Editing.

ADD A BENEFICIARY

1. Type the name in the Beneficiary column and then press enter. If she/he is not in the system, a window will display that says "No Matches found." If no matches, click **Create** and then click **Add Beneficiary**.

workday Nathan B Sperl (80012708)

Change Benefit Elections Beneficiary Change for Nathan B Sperl (80012708) - Step 2 of 3

Event Date 11/20/2015 Total Employee Net Cost/Credit \$0.00 Semi-monthly Cost

Initiated On 11/20/2015

Submit Elections By 12/19/2015

Beneficiaries and/or Beneficiary percentages are updated or changed on this page.
 To Add a new Beneficiary click the lime green circle with the white plus sign in the middle, you can add a bene
 To Remove a Beneficiary click the blue circle with the white X sign in the middle located in front of the current
 Remember all percentages must equal 100% for primary and contingent beneficiaries.
 When finished continue to the next page.

← Create

Add Beneficiary

Add Beneficiary Using Existing Contact


Add Trust

create a new beneficiary/trust.

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2. Fill out all required information for this beneficiary.
 - a. Click the search icon in the **Relationship** field to select a relationship.
 - b. Type the person's Legal Name.
 - c. Complete all other applicable information, for example:
 - i. Date of Birth.
 - ii. Gender.
 - iii. If a Full-time Student, check the box.
 - iv. If disabled, check the box.
 - v. We recommend NOT checking the box for Allow Duplicate Name.

Enter your beneficiary information.

Relationship * search 

Use as Beneficiary

Date of Birth

Age (empty)

Gender

Full-time Student


Student Status Start Date

Student Status End Date

Disabled

Allow Duplicate Name

Legal Name | Contact Information | National IDs | Additional Government IDs | Other IDs

Country * United States of America 

First Name *

Middle Name

Last Name *

3. When finished on the Legal Name tab, click the Contact Information tab to enter address information.
 - a. At least one address is required. Click Contact Information and then Add Address to enter the beneficiary's address. Fields marked with a red asterisk are required.
 - b. You can choose to use your address, if the beneficiary lives with you. In the Use Existing Address field, click the prompt, and then click All. Your address should show up; click your address.
 - c. Choose either Home or Work in the Type field.
4. When finished with the Contact Information, click OK.
5. The page will return to the Change Benefit Elections screen, where the Primary Percentage and/or Contingent Percentage for each of the beneficiaries can be entered. Note: For all plans, the Primary Percentage MUST total 100% and, if used, the Contingent Percentage must total 100%.
6. Click Continue on the Change Benefit Elections page.

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BENEFIT ELECTIONS REVIEW FOR BENEFICIARY CHANGE

The last page will show the updated beneficiaries for this event.

1. Read the Electronic Signature information.
2. Verify the information in the Beneficiaries column is correct.
3. Read the Electronic Signature provisions and click the "I Agree" checkbox.

Benefit Change Review
Review your beneficiary changes.
Beneficiary changes can be done anytime during the benefit plan year.
To finish click the "I Agree" button below the Electronic Signature on this page and submit.

Elected Coverages 2 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employer Contribution (Semi-monthly)
Basic Life - Aetna Full Time (Employee)	08/01/2015	07/13/2015	\$20,000	\$20,000.00		John Beneficiary	\$0.48
Total:							0.48

> Waived Coverages

> Beneficiary Designations

Submit

Save for Later

Go Back

Cancel

4. Click one of the following:
 - a. Submit – to finish the process.
 - b. Save for Later – to save the process and submit it at a later time.
 - c. Go Back – to return to the previous pages in the event.
 - d. Cancel – to cancel everything. The event will go back into the Workday inbox with no changes saved.

Note: When the process has been submitted successfully, you will see the Submit Election Confirmation page, which can be printed (if needed). Click Done.

Note: The Submitted Life Event does not require additional approval steps.

LINK HELP DESK CONTACT INFORMATION

The LINK Help Desk provides assistance for the following programs:

- The Employee Work Center
- The Employee Development Center

Email: as.linkhelp@nebraska.gov

Phone: 402.471.6234