# Change Beneficiary - Add or Remove

## CONTENTS



## PURPOSE

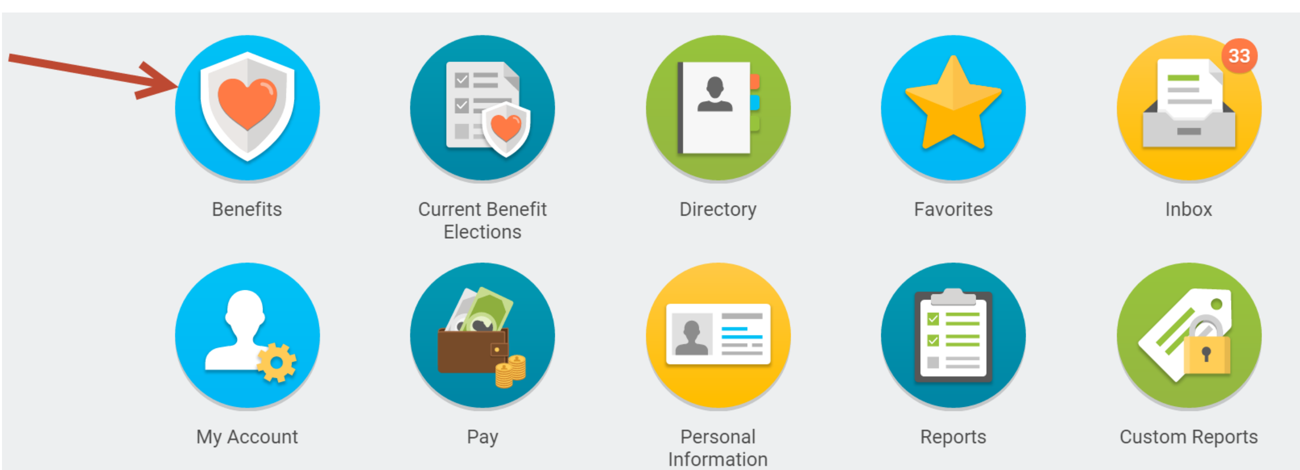
This is for employees to add or remove beneficiaries that are listed for them in the Employee Work Center.

## 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).

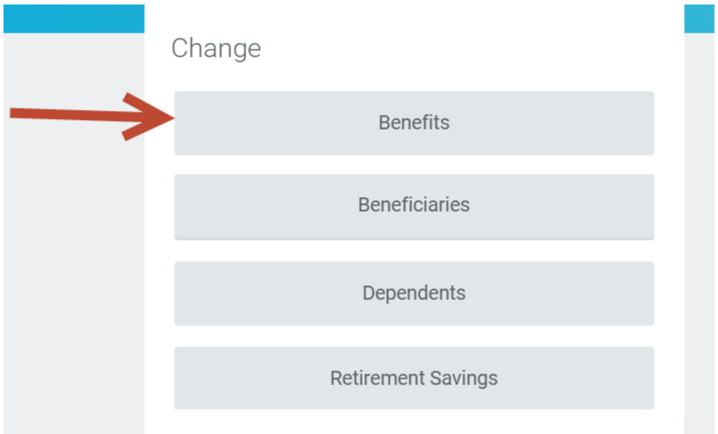
## INITIATE A LIFE EVENT TO START THE CHANGE BENEFICIARY PROCESS

1. Click the Benefits icon on the Home Page.

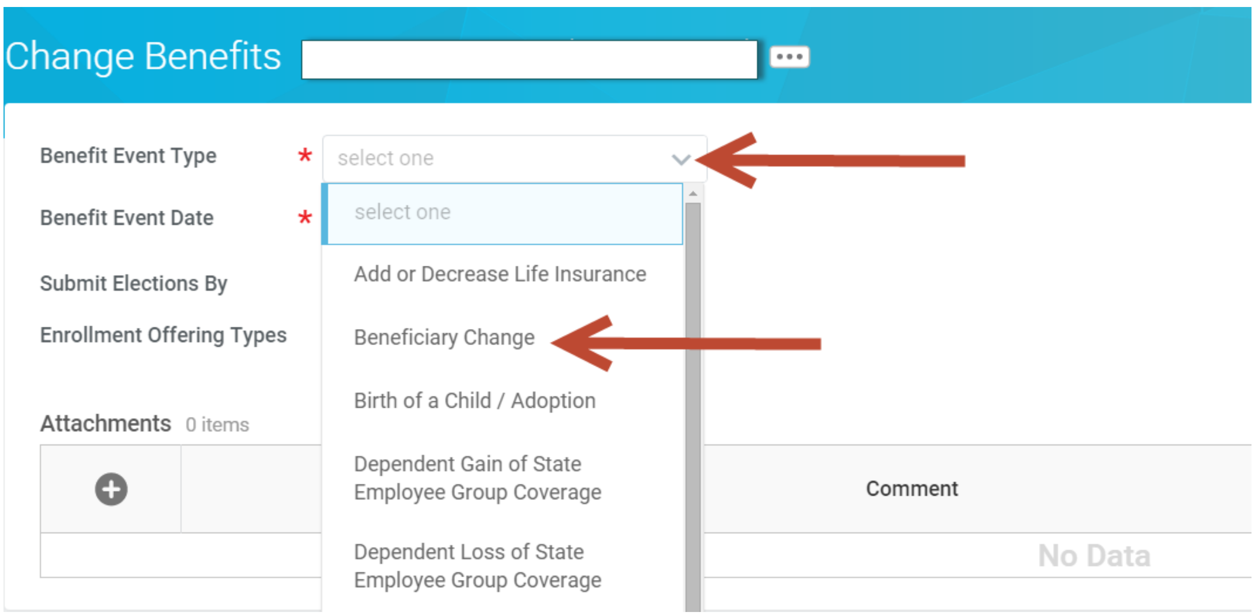


# Change Beneficiary - Add or Remove

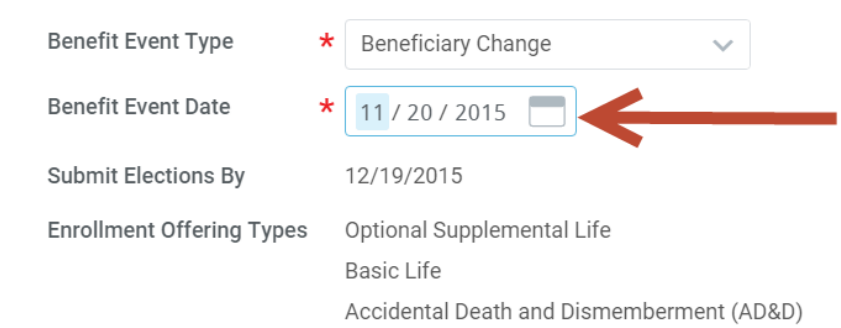
2. Click Benefits from the Change column.




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




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.

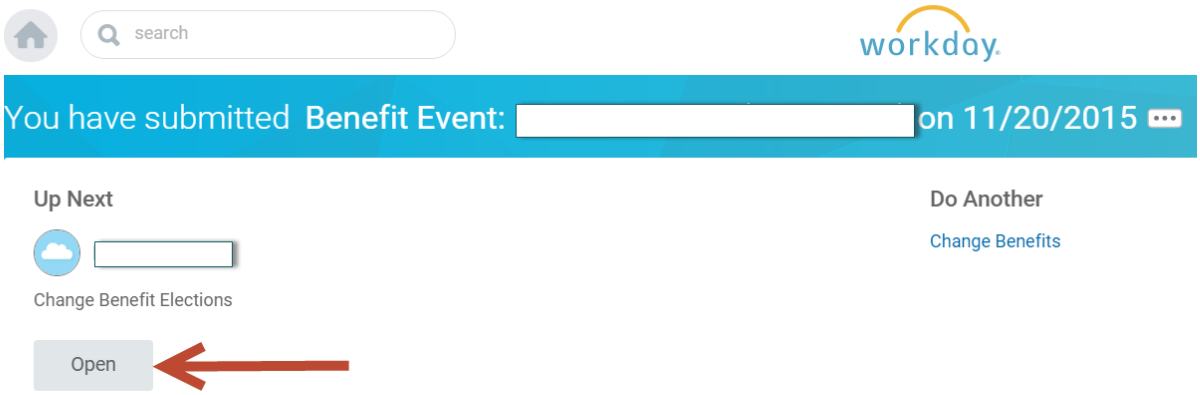



5. Click Submit at the bottom of the page.

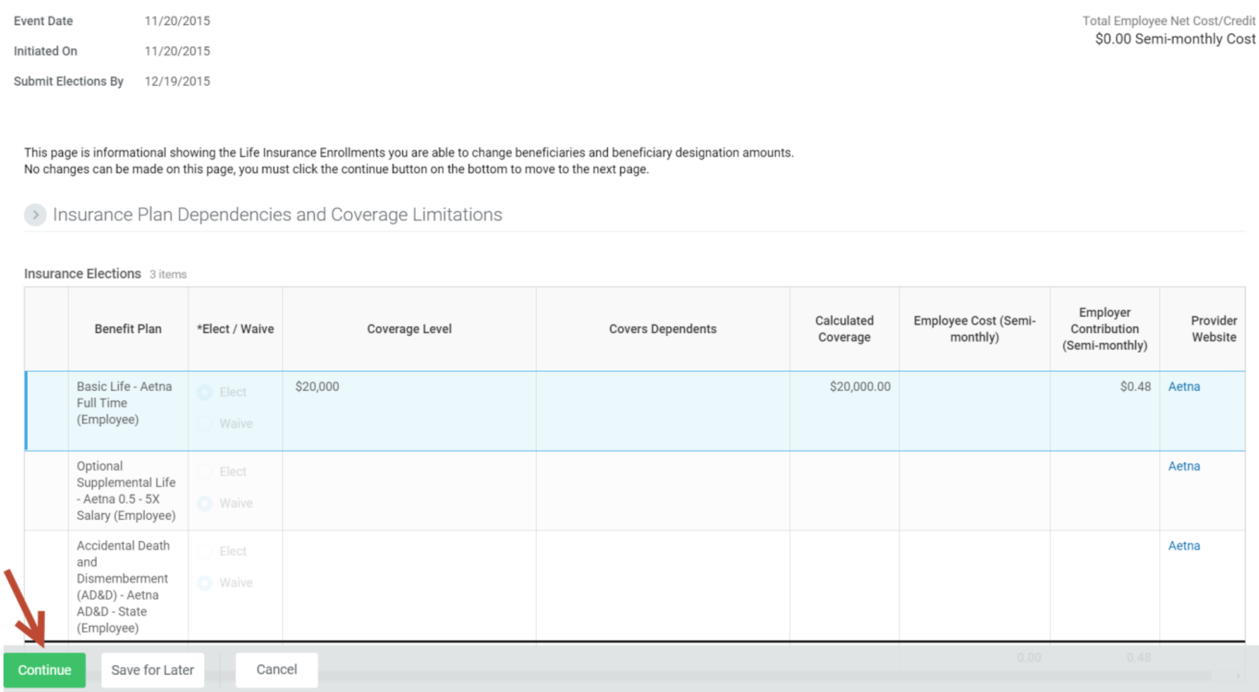
## CHANGE BENEFICIARY (ADD OR REMOVE)

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

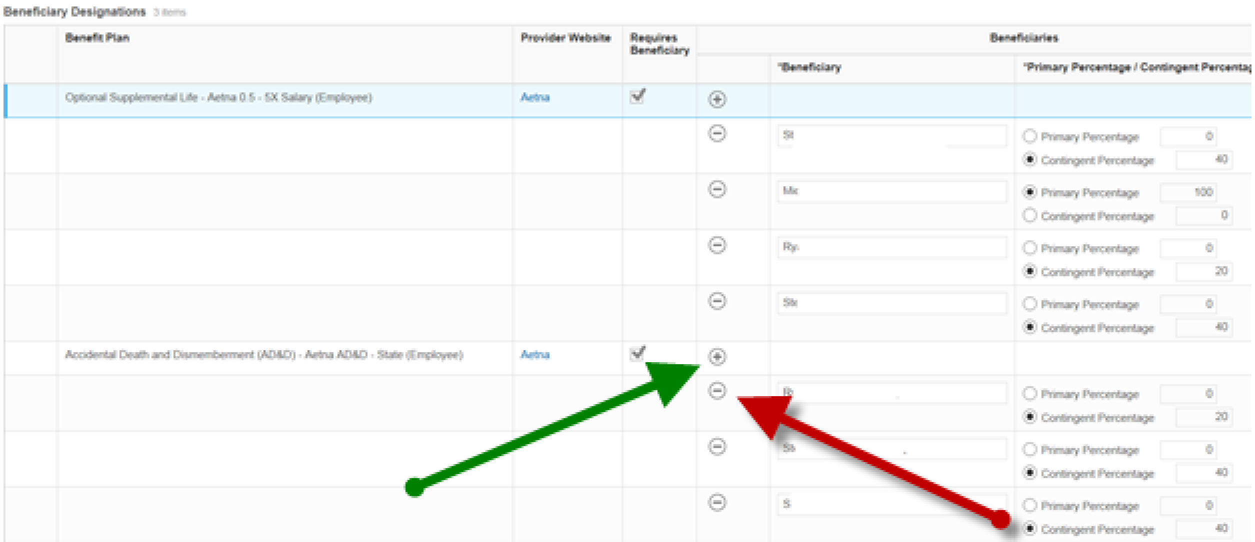
1. Click **Open**.




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.



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).

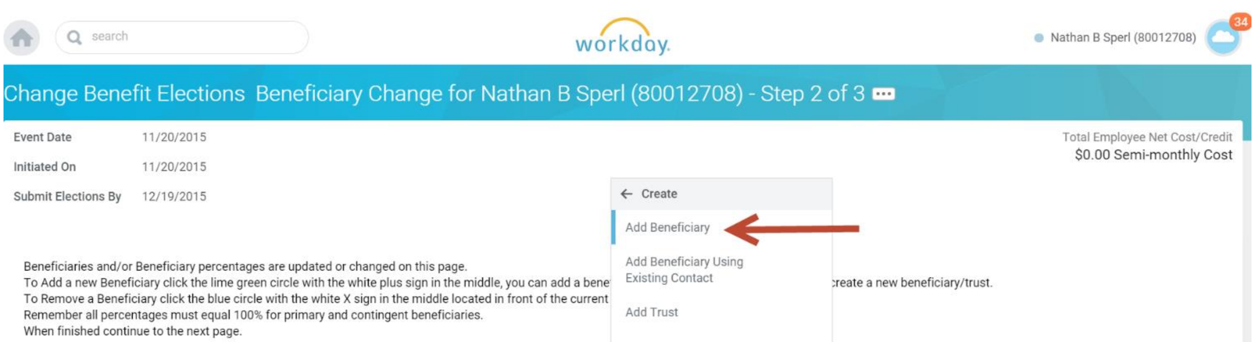



## Remove a Beneficiary

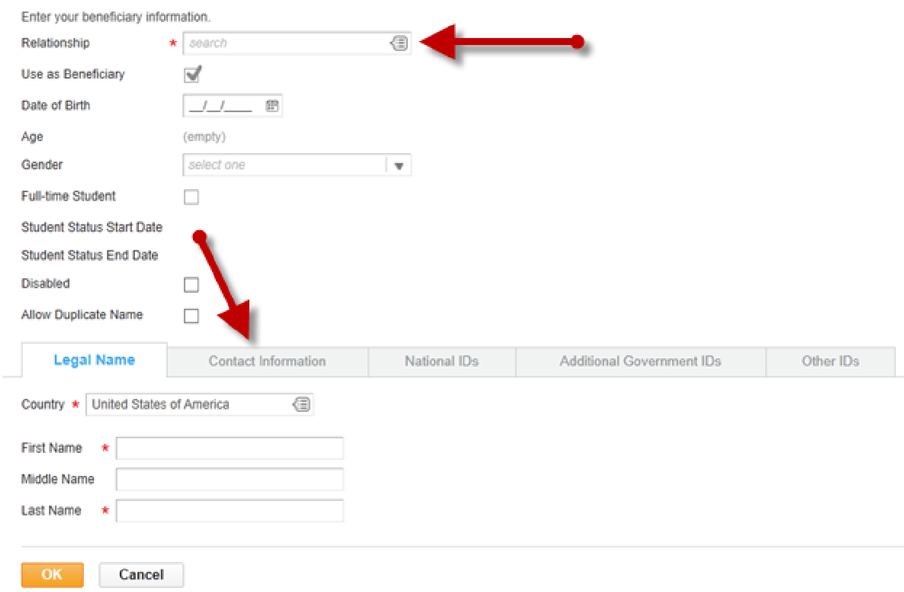
1. Click **Continue** on the Change Benefit Elections page.
2. When the beneficiary disappears from the list, click Continue at the bottom of the page. Note: At least one beneficiary is required. Another beneficiary will need to be added to continue (click the Plus sign and continue to the Add a Beneficiary 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**.



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.

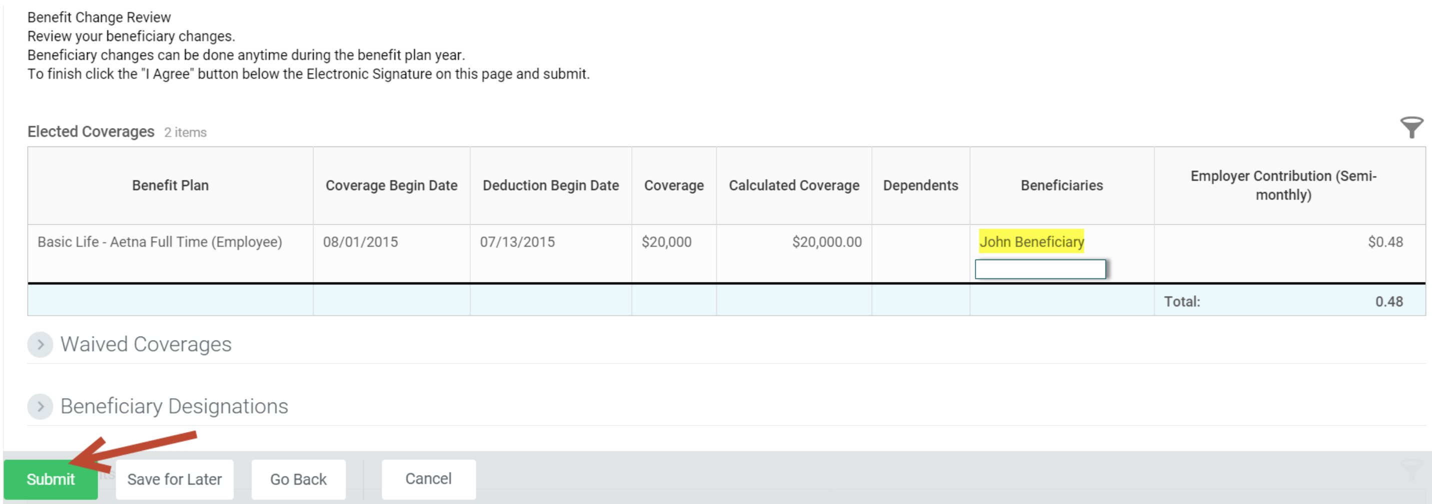



3. When finished on the Legal Name tab, click the Contact Information tab to enter address information.
    a. At least one address is required. Click Contact Information and then Add Address to enter the beneficiary's address. Fields marked with a red asterisk are required.
    b. You can choose to 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.

## 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.




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