

Change Beneficiary



People · Service · Business

LINK

Table of Contents:

Log in to the Employee Work Center 3

Start the Change Beneficiary process..... 3

Add the Beneficiaries 5

 Remove a Beneficiary 6

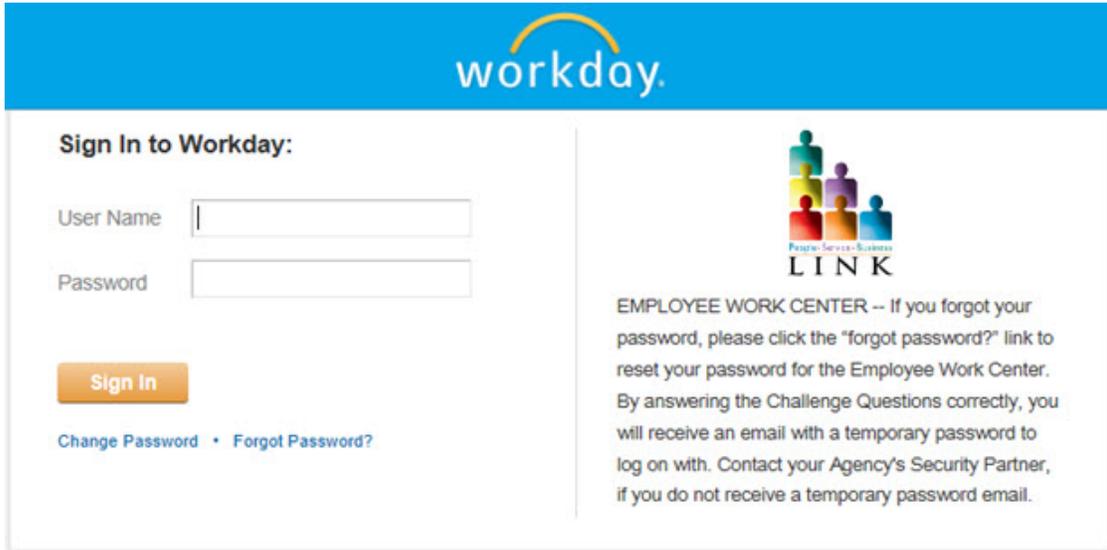
 Add a Beneficiary 7

Benefit Elections Review for Beneficiary Change..... 8

LINK Help Desk Contact Information 9

Log in to the Employee Work Center

1. Type your User Name, press tab, and then type your password.
2. Click **Sign In**, or press enter.



Sign In to Workday:

User Name

Password

Sign In

[Change Password](#) • [Forgot Password?](#)

LINK

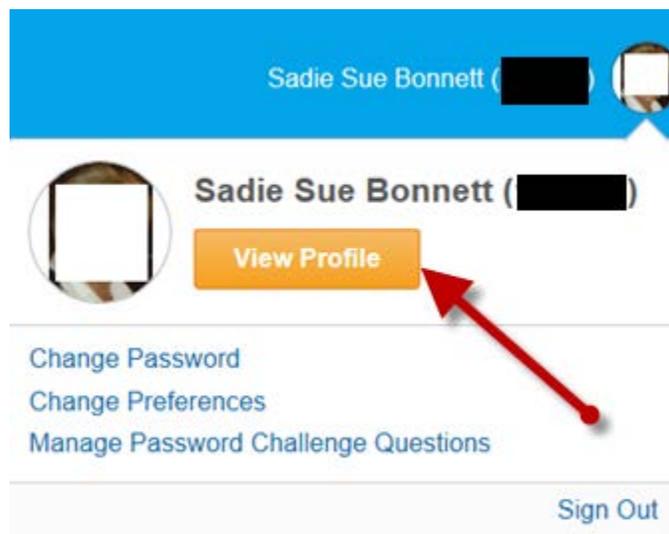
EMPLOYEE WORK CENTER -- If you forgot your password, please click the "forgot password?" link to reset your password for the Employee Work Center. By answering the Challenge Questions correctly, you will receive an email with a temporary password to log on with. Contact your Agency's Security Partner, if you do not receive a temporary password email.

Start the Change Beneficiary process

1. Click your name in the upper right-hand corner of any page.

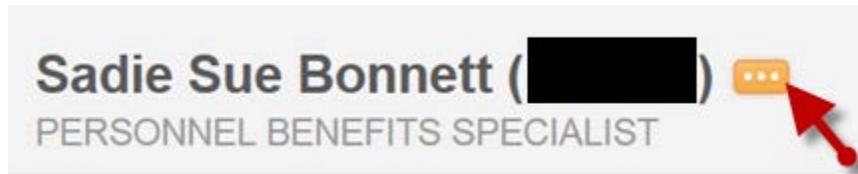


2. The drop down window for your profile will open. Click **View Profile**.

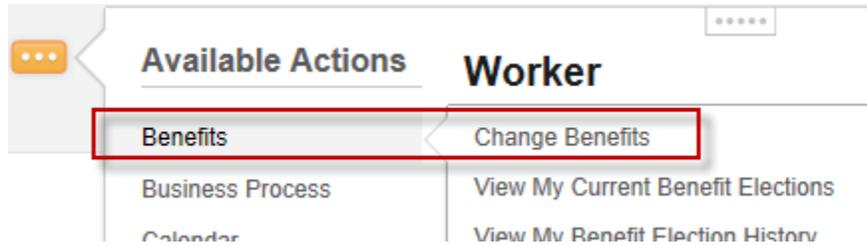


Change Beneficiary

- Your employee worker page will open. Click the **Related Actions** icon behind your name and employee ID.



- Hover over **Benefits** and click **Change Benefits**.



- In the **Benefit Event Type** field, click the drop down arrow and select **Beneficiary Change**.

Change Benefits

Deb Tatro101 (80006972) ...

Benefit Event Type	*	Beneficiary Change	▼
Benefit Event Date	*	04/22/2014	📅
Submit Elections By		05/21/2014	
Enrollment Offering Types		Accidental Death and Dismemberment (AD&D) Basic Life Optional Supplemental Life	

- Enter the **Benefit Event Date**.

NOTE: THE CURRENT DATE WILL BE USED FOR THE BENEFIT EVENT DATE FOR A BENEFICIARY CHANGE.

Benefit Event Type	*	Beneficiary Change	▼
Benefit Event Date	*	/ /	📅
Submit Elections By	*	/ /	📅
Open Elections for		(empty)	
Attachments			
<input data-bbox="418 1766 456 1814" type="button" value="+"/>	Attachment		

◀ April 2014 ▶

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

- Do Not Enter** a date in the **Submit Elections By** field. This date will automatically populate with the last day you can open the event, complete the process and submit the event for processing.

Change Beneficiary

- Go to the bottom of the page and click **Submit**.



Add the Beneficiaries

Once you have initiated the life event (completed the above steps), you will need to complete the event.

- On the next screen, click **Open**.



- No changes can be made on the first page of this process. It will show your current life insurance plans.

Change Benefit Elections

Beneficiary Change for [redacted] - Step 1 of 3

Event Date: 04/04/2014

Initiated On: 04/04/2014

Submit Elections By: 05/03/2014

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	Cost
Basic Life - Aetna Full Time (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$20,000		\$2,000
Optional Supplemental Life - Aetna 0.5 - 5X Salary (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	2 X Salary		\$6,000
Accidental Death and Dismemberment (AD&D) - Aetna AD&D - State (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$5,200		\$5,200

- Click **Continue**.

Change Beneficiary

4. On the next screen, you can either:
 - a. Click the **Minus Sign** to remove a beneficiary, OR
 - b. Click the **Plus Sign** to add a beneficiary.

Beneficiary Designations 0 items

Benefit Plan	Provider Website	Requires Beneficiary	Beneficiaries	
			Beneficiary	Primary Percentage / Contingent Percentage
Optional Supplemental Life - Aetna 0.5 - SX Salary (Employee)	Aetna	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	
			<input type="button" value="-"/>	St <input type="radio"/> Primary Percentage <input type="text" value="0"/> <input checked="" type="radio"/> Contingent Percentage <input type="text" value="40"/>
			<input type="button" value="-"/>	Ms <input checked="" type="radio"/> Primary Percentage <input type="text" value="100"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/>
			<input type="button" value="-"/>	Ry <input type="radio"/> Primary Percentage <input type="text" value="0"/> <input checked="" type="radio"/> Contingent Percentage <input type="text" value="20"/>
			<input type="button" value="-"/>	Sl <input type="radio"/> Primary Percentage <input type="text" value="0"/> <input checked="" type="radio"/> Contingent Percentage <input type="text" value="40"/>
Accidental Death and Dismemberment (AD&D) - Aetna AD&D - State (Employee)	Aetna	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	
			<input type="button" value="-"/>	St <input type="radio"/> Primary Percentage <input type="text" value="0"/> <input checked="" type="radio"/> Contingent Percentage <input type="text" value="20"/>
			<input type="button" value="-"/>	Sl <input type="radio"/> Primary Percentage <input type="text" value="0"/> <input checked="" type="radio"/> Contingent Percentage <input type="text" value="40"/>
			<input type="button" value="-"/>	S <input type="radio"/> Primary Percentage <input type="text" value="0"/> <input checked="" type="radio"/> Contingent Percentage <input type="text" value="40"/>

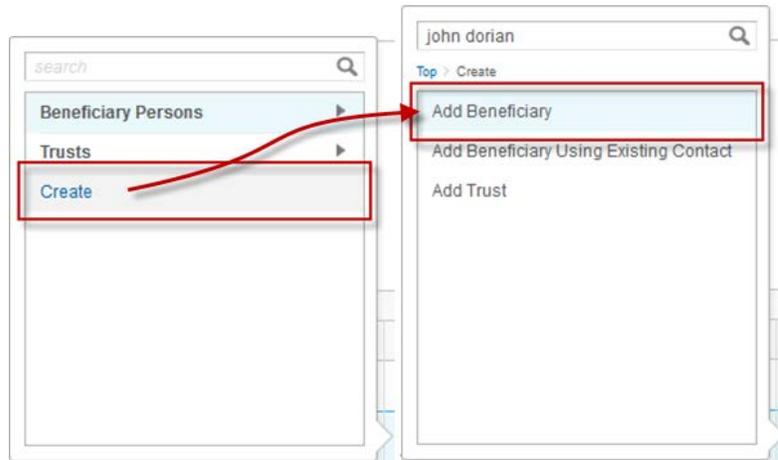


Remove a Beneficiary

1. If you only have one beneficiary, and you click the minus sign, you will see an error message that says, "One or more benefit plans require at least one beneficiary designation. You must enter a beneficiary or change your election. You may be required to enter a beneficiary if you were automatically enrolled in this benefit plan." You will need to add a beneficiary to continue (click the **Plus** sign) OR click **Cancel** to not remove that beneficiary. If you click **Cancel**, you will be prompted to either **Discard Changes** or **Continue Editing**.

Add a Beneficiary

1. If you click the plus sign, you will need to either create a new beneficiary or use one that already exists in the system.
2. Type the name in the Beneficiary column and then press enter. If he/she is not in the system, you will see a window that says "No Matches found." If no matches, click **Create** and then click **Add Beneficiary**.



3. 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, click the box.
 - iv. If Disabled, click the box.
 - v. We recommend that you NOT check the box for Allow Duplicate Name.

Enter your beneficiary information.

Relationship * 

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 * 

First Name *

Middle Name

Last Name *

Change Beneficiary

- When you are done on the Legal Name tab, click the Contact Information tab to enter address information.
 - At least one address is required; you need to click **Contact Information** and then **Add Address** to enter their address. Fields marked with a red asterisk are required.
 - 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.
 - Choose either Home or Work in the Type field.
- When you are done with the Contact Information, click **OK**.
- You will be back at the Change Benefit Elections screen, where you will enter the Primary Percentage and/or Contingent Percentage for each of your beneficiaries.

NOTE: FOR ALL PLANS, THE PRIMARY PERCENTAGE MUST TOTAL 100% AND, IF USED, THE CONTINGENT PERCENTAGE MUST TOTAL 100%.
- Click **Continue** on the Change Benefit Elections page.

Benefit Elections Review for Beneficiary Change

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

- Read the Electronic Signature information.
- Verify the "Beneficiaries" information is correct.

Change Benefit Elections

Benefit Elections Review for Beneficiary Change - Step 3 of 3

Worker: Deb Tatro101 (80006972)
Initiated On: 04/22/2014

Event Date: 04/22/2014
Submit Elections By: 05/21/2014

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

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

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employer Contribution (Semi-monthly)
Basic Life - Aetna Full Time (Employee)	05/01/2014	05/05/2014	\$20,000	\$20,000.00		Daughter Tatro101	\$0.48
Total:							0.48

Waived Coverages

Beneficiary Designations

Attachments

Attachment	Comment	File
No Data		

[View Comments \(0\)](#)
[Process History](#)
[Related Links](#)

Change Beneficiary

3. Click **Submit**. Or, you can:
 1. **Save for Later** – can be used to save the process and submit it at a later time.
 2. **Go Back** – will take the employee back to previous pages in the event.
 3. **Cancel** – will cancel everything. The event will go back into the employee's inbox with no changes saved.

NOTE: WHEN THE PROCESS HAS BEEN SUBMITTED SUCCESSFULLY, YOU WILL RECEIVE THE SUBMIT ELECTION CONFIRMATION PAGE TO PRINT (IF YOU WISH) AND THEN 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
- The Recruitment & Selection Center

URL: <https://ciohelpdesk.nebraska.gov/User/>

Email: as.linkhelp@nebraska.gov

Phone: 402.471.6234