Change Beneficiary - Add or Remove

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PURPOSE

This is for employees to create new beneficiary files, and to add or remove beneficiaries from plans in Workday. The newly created Beneficiary can then be added to existing insurance coverage elections.

LOG IN TO WORKDAY (EMPLOYEE WORK CENTER)

1. Log in to Workday (Employee Work Center) from this page, http://link.nebraska.gov/.

    a. **If you have an @nebraska.gov email**, click the first link that says, "Log in with your @nebraska.gov email." On the next screen, type your email address and your email address password.

    b. **If you do NOT have an @nebraska.gov email**, click the second link that says, "Log in with your User Name / Workday password." On the next screen, type your User Name and Workday password.

2. Click Sign In (or press Enter).

BENEFICIARY PROCESS

1. On your Home Page, click the Benefits icon.

2. On the left side of the screen, in the Change column, click Beneficiaries.

CHANGE BENEFICIARY (ADD OR REMOVE)

ADD A NEW BENEFICIARY

1. Click **Add** to create a new Beneficiary.

2. Select either the Create a New Beneficiary OR Create a New Trust as Beneficiary. In this case, we will Create a New Beneficiary.

3. Click OK.

4. On the Beneficiary Personal Information screen, complete all required information for this beneficiary. Click in each section to add the information, including:

NAME AND OTHER PERSONAL INFORMATION

    a. Legal Name

    b. Relationship

        i. Click the search icon in the **Relationship** field to select a relationship.

    c. Date of Birth.

    d. Gender.

CONTACT INFORMATION

    a. Scroll down the page and complete the Contact Information.

        i. At least one address is required. Click Add under Primary Address to enter the beneficiary's address. Fields marked with a red asterisk are required.

            NOTE: 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.

        ii. Choose either Home or Work in the Type field.

    b. Add other information, as applicable, such as Primary Phone or Primary Email for this person.

IDENTIFIER INFORMATION

    a. Scroll down the page and complete the Identifier Information. DO NOT enter anything in the Other IDs section.

        NOTE: These details are important but are not required to finish creating the file.

    b. Click National IDs to add a Social Security Number.

    c. Click Government IDs to add other types of Government ID information, such as Certificate of Citizenship, Passport, Military ID, School ID, etc.

5. When finished, click Submit.

6. Click Done.

7. You will be returned to the Beneficiary screen.

REMOVE A BENEFICIARY

1. From the Beneficiary screen, you can click Delete to remove any Beneficiaries in your list if they have never been assigned to a plan.

2. Select an Effective Date.

3. Type comments, if applicable.

4. Click Submit.

5. Click Done.

EDIT A BENEFICIARY

1. From the Beneficiary screen, you can click Edit to change details of a specific Beneficiary in your list.

2. Click on the field you wish to update.

3. Enter the new information.

4. Click anywhere outside the field you updated. Repeat as necessary until all fields have been updated.

    NOTE: Never change an existing file so that it identifies a new person.

5. Click Submit.

6. Click Done.

ADD NEW BENEFICIARY TO EXISTING INSURANCE ELECTIONS

1. From the Actions menu (behind your name), navigate to Benefits and then click Change Benefits.

2. In the Change Reason selection box, scroll to and select Beneficiary Change.

3. In Current Date, type, or select, today's date.

    a. You will then see a list of your Benefit Elections where you can assign your new Beneficiary.

4. Click Submit.

5. Click Open, and then, on the next screen, click Let's Get Started.

Initiated On	11/06/2020
Submit Elections By	11/30/2020

Let's Get Started

6. Click Manage for each insurance type where you want to change your Beneficiary, click Confirm and Continue.

   NOTE: You cannot choose to Enroll in any new Elections in this event.

7. Please read the Insurance Instructions carefully.

8. Under Primary Beneficiaries (OR under Secondary Beneficiaries), click the plus icon to add a new row.

9. Click the blank Beneficiary box and choose an option from the drop-down menu to either assign an existing beneficiary file or create and assign a new beneficiary file.

10. Click the percentage box for that beneficiary and enter the desired payout percentage.

    NOTES:

    - Regardless of how many Beneficiaries you include, the Primary Percentage MUST total 100%.
    - IF the Secondary Beneficiary Percentage is used, all beneficiaries in that section must also total 100%.

11. When you are done adding your Beneficiary, and configuring the Percentages, click Save.

12. If you need to, click Manage on any of your other Insurance Elections to add this new Beneficiary. Follow the steps outlined above in Steps 6 through 11.

13. When you are done adding your new Beneficiary, click Review and Sign.

14. The next screen shows a Summary of the changes you have made.

15. Towards the bottom of the page, click the checkbox next to I Accept, and then click Submit.

   NOTE: On the next screen, you can click the **View 2020 Benefits Statement** to review your changes and/or print a copy.

16. Click Done.

17. This event will now be sent to your agency HR Partner and the Benefits Team for approval.

18. Once approved, the Beneficiary change takes effect as of the event date entered at the beginning.

LINK HELP DESK CONTACT INFORMATION

The LINK Help Desk assists with the following programs:

- Workday (Employee Work Center)
- Employee Development Center

Email: as.linkhelp@nebraska.gov

Phone: 402.471.6234