

Beneficiary Designation in Workday

This document contains instructions for designating beneficiaries in Workday for your Basic Term Life Insurance, Group Universal Life (GUL) Insurance, Basic AD&D Insurance, Voluntary AD&D Insurance and Business Travel Accident (BTA) Insurance. The beneficiary that you designate for these coverages may be different for each plan for which Leidos offers.

In addition, you may change your beneficiary(ies) at any time via Workday.

TO ADD A NEW BENEFICIARY IN WORKDAY:

1. On the home page, select the **Menu** icon (upper left corner), then select **My Benefits and Compensation**.
2. Under **Manage Benefits**, select **Beneficiaries**.
3. Select **Add** and then Select **New Person as Beneficiary**, then select **OK**.
4. Enter all the **Beneficiary Personal Information**.
5. Enter a **Primary Address** for the beneficiary.
6. Select **Submit**.

Note: If you wish to designate a percentage of your life or AD&D insurance to the new beneficiary, refer to the instructions below on designating beneficiary percentages.

TO MODIFY AN EXISTING BENEFICIARY IN WORKDAY:

1. On the home page, select **My Benefits and Compensation**.
2. Under **Manage Benefits**, select **Beneficiaries**.
3. Select **Edit** to the right of the beneficiary you wish to update.
4. Select the **pencil** next to the section you would like to edit.
5. Click the **check mark** to close that section. Repeat on each individual that you would like to update.
6. Click **Submit**.

Note:

- This only adds/modifies the list of persons/trusts and their details to the list of persons who you can select as a beneficiary.
- Once the details of the beneficiary are correct, to change percentages of benefits or plans the beneficiary is associated with, refer to the instructions below on designating beneficiary percentages.

TO REMOVE A BENEFICIARY DESIGNATION IN WORKDAY:

Should you need to remove a beneficiary for Life and/or AD&D, select the (-) symbol beside their name. Please be sure to update the percentage allocated to each remaining or newly added beneficiary.

Note:

- Due to historical record requirements, you cannot delete a former beneficiary's record.
- Once the beneficiary has been removed, refer to the instructions below on designating beneficiary percentages to update the allocation for your remaining beneficiaries.

DESIGNATE BENEFICIARY PERCENTAGES IN WORKDAY:

1. On the home page, select the **Menu** icon (upper left corner), then select **My Benefits and Compensation**.
2. Under Manage Benefits, select **Change Benefits**.
3. In the **Benefit Event Type** field, select **Change Beneficiary** from the drop-down menu.
4. Enter the **Benefit Event Date**. **Note:** The **Benefit Event Date** should be the date the change is being entered into the system.
5. Select **Submit**.
6. Select **Open**.
7. Select **Let's Get Started**.
8. Answer the Tobacco Use question and then click **Continue**.
9. Click **Continue**.
10. Select **Manage** on the Benefit Plan(s) you would like to add or edit the beneficiary for and select **Confirm and Continue**.
11. Remain on the Change Benefit Elections, and:
 - a. Select the **Primary Percentage** or **Contingent Percentage** for each beneficiary and enter the amount in the corresponding field.
 - b. Do this for each beneficiary for each plan.
 - c. If only one plan has a designation, the same will be used for all plans in the event the benefit is paid.
12. Once you have finished reviewing all Benefit Plans then you will select **Review and Sign**.
13. Review your elections. Scroll to the bottom of the screen, and select **I Agree**.
14. Select **Submit**.

Note:

- A contingent beneficiary is a beneficiary who will receive the benefits if the primary beneficiary is no longer living at the time the benefit is to be paid.
- You may split the percentage amount across several beneficiaries for a specific plan. However, the total must equal 100 percent.