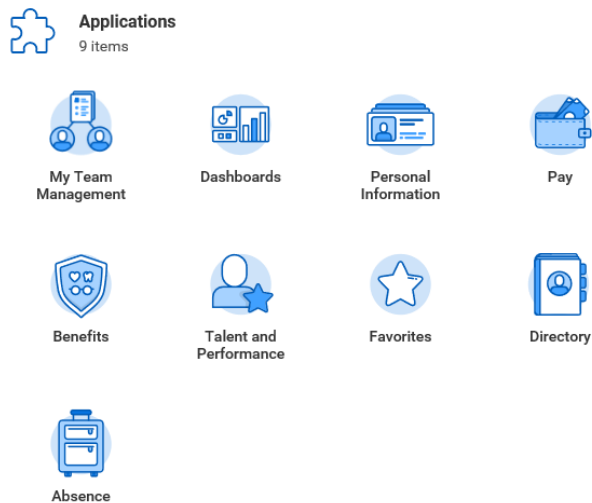


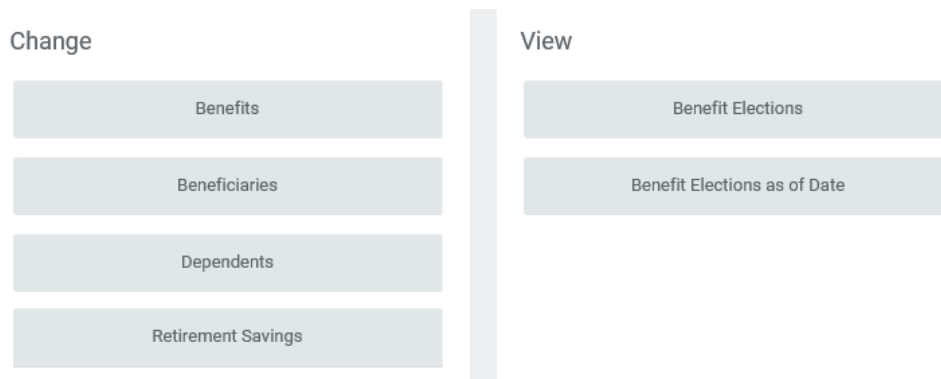
Adding/Updating Beneficiaries in Workday

Adding/Updating Beneficiaries in Workday is a two-step process. Please follow the instructions below to add/update beneficiaries and link them to your Life Insurance plans through Ocean Spray. If you need further assistance with this process, please contact OneSource Virtual directly at oscbenefits@onesourcevirtual.com or call (844) 672-3372 option 2.

1. Log into Workday
2. Click on the “**Benefits**” Worklet under your Applications



3. Under the “**Change**” column, click on “**Beneficiaries**”



4. From the “**Beneficiaries**” page, you can either add new beneficiaries by clicking “**Add**” at the top of the page or update existing beneficiaries by clicking “**Edit**” next to your existing beneficiary
 - a. When you add a new beneficiary, you can pull from an existing dependent or emergency contact, create a new beneficiary from scratch or create a new trust as a beneficiary

Add My Beneficiary

☐ Existing Dependent or Emergency Contact

☐ Create a New Beneficiary

☐ Create a New Trust as Beneficiary

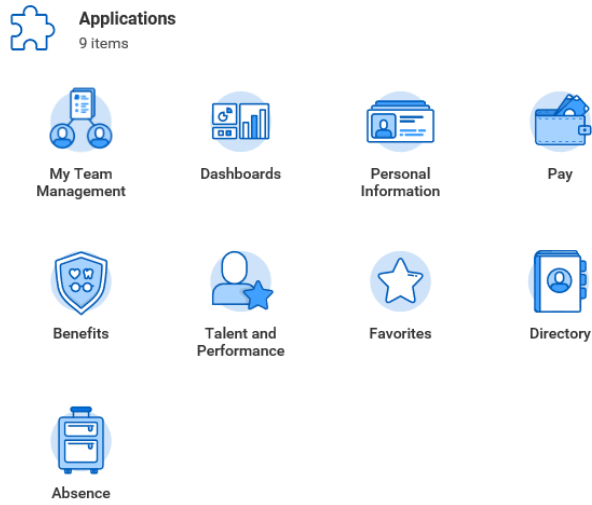
5. If adding a new beneficiary, you will need to enter the required “**Beneficiary Personal Information**” fields
6. Once complete, click “**Submit**”



Process Successfully Completed

> Details and Process

7. Once you’ve added your beneficiary or beneficiaries, you will need to initiate the “**Beneficiary Change**” Life Event by going back to your homepage and clicking into the “**Benefits**” Worklet again under your Applications:



8. Under the “**Change**” column, click on “**Benefits**”



9. Under the “**Change Benefits**” task, click on the Benefit Event Type called “**Beneficiary Change**” along with the effective date of the change and click “**Submit**” (there is no need to add any attachments for this type of benefits change)

If you need to make benefit changes based on a Life Event of Marital Status Change (**Divorce/Dissolution**), please go to the your Home Page > Benefits Worklet > Change Dependents > Edit. Click on the pencil icon in the Relationship section to edit the relationship of your Spouse/Domestic Partner to "Ex-Spouse" or "Ex-Domestic Partner". This will automatically flow into the Benefit Enrollment process so you can remove this dependent from your Benefits.

If you are submitting a life event, you will be required to attach the supporting documentation below before you will be prompted to make enrollment changes.

Benefit Event Type

- ☒ Beneficiary Change
- ☐ Birth/Adoption of a Child
- ☐ Death of Spouse/Child
- ☐ Dependent Gains/Loses Other Coverage
- ☐ Employee Gains Other Coverage
- ☐ Employee Loses Other Coverage
- ☐ Health Saving Election Changes
- ☐ Marital Status - Marriage
- ☐ Parking & Transit Changes

Benefit Event Date: 02/12/2020

Submit Elections By: 03/13/2020

Enrollment Offering Types

- Basic Group Term AD&D
- Basic Group Term Life
- Supplemental Employee Group Term Life

Attachments

Drop files here

Submit Save for Later Cancel

10. Next, you will see the **"Up Next"** screen with the ability to open the task to attach your beneficiary to the applicable plans. Click **"Open"**

Up Next



Keri Gannon

Change Benefit Elections

Open

> **Details and Process**

11. You will be brought the **"Insurance Plan Dependencies and Coverage Limitations"** page. This is informational only and will display what Life Insurance plans that you're currently enrolled in. Click **"Continue"**
12. The next page will allow you to designate your beneficiaries for each plan
- You can assign multiple beneficiaries (primary and contingent) along with the appropriate percentages. Click the **"+"** sign next to each benefit and then choose the appropriate beneficiary. You can add more than 1 beneficiary by clicking the **"+"** sign again.
 - Please note, the total percentage for each plan must equal 100%
13. Click **"Continue"** once you've made your updates
14. This page will allow you to review your beneficiary change. Verify that everything appears the way you would expect and then click **"I Agree"** under the Electronic Signature and then **"Submit"**
15. Once submitted, you can launch a printable version of the summary for your records or to save it to your computer by clicking **"Print"**
- The top of this page will show your **"Elected Coverages"** and the beneficiaries assigned to each benefit. This does not show primary v. contingent details. To get the breakdown for this, scroll further down the page and review this information under **"Beneficiary Designations"**. This section will show you the Primary beneficiaries as well as the Contingent beneficiaries along with the percentages that you assigned.
16. Once all changes have been verified, click **"Done"**
17. You should be able to go back to your homepage and click back into the **"Benefits"** Worklet under your Applications and click **"View Benefit Elections"** and see the changes you just made in real time