

BENEFICIARY DESIGNATIONS

To update your beneficiary information for the District-paid Basic Life, Basic AD&D and Long Term Disability plan, click “manage” on the benefit plan.

It is optional to designate a beneficiary in Workday. However, Human Resources always recommends that you complete this information.



During the initial load of information into Workday in December 2016, beneficiary information was not transferred. The most current paper form in your employee file is the beneficiary record. If you would like to track your beneficiary in Workday, please complete these steps in Workday

Entries you make in Workday will replace the paper form in your file and will become the current record for your beneficiary designation.

To enter a beneficiary:

1. Click Confirm and Continue.
2. You will see two sections – Primary Beneficiaries and Secondary Beneficiaries
3. To enter a beneficiary, click on the plus sign to start a new row

Click on the prompt to find an existing beneficiary person or trust that you have already created in Workday

- Assign a percentage for that beneficiary
- You can click on the plus sign to add more rows
- You must have at least one primary beneficiary and all percentages must equal to 100%
- You may choose to assign one or more secondary beneficiaries in the event the primary beneficiary is no longer a valid beneficiary. All percentages must equal to 100%.

If your beneficiary is not listed, you can choose “Add New Beneficiary or Trust”

- Follow the instructions to add a new beneficiary or trust

4. Click Save.



Beneficiary information for your pension plan or retirement savings plan is not tracked in Workday. Those updates can only be made directly with the institution. Please contact PERS, STRS or your 403(b)/457(b) vendor directly to update your beneficiary information.