Change Beneficiaries

Purpose
This document explains how to designate or change beneficiaries for Basic Life Insurance, Supplemental Life Insurance, and/or Personal Accident Insurance.

To designate or change beneficiaries for Retirement plans, log into your TIAA account.

Steps to Change Beneficiaries
1. Log in to Workday using your CNet ID and Password.
2. From the Home page, click View All Apps at the bottom of the Quick Tasks card on the right side of the screen.

Keep in Mind
- You have 7 days to complete your beneficiary change. After 7 days, you will need to re-initiate the event.
- If you are modifying your beneficiaries or dependents, you must provide Social Security Numbers, Dates of Birth, and Addresses for those individuals.
3. Click on the **Benefits** icon.

![Benefits icon](image)

4. In the **Change** card (top left), click on **Benefits**.
   a. **Do NOT select the Beneficiaries or Dependents buttons.**

![Change card](image)

5. From the **Change Reason** dropdown menu, choose **Beneficiary Change**.
6. Enter today’s date or a date in the future as the **Effective Date of Change** by typing in the prompt box or using the calendar icon.
7. Click the **Submit** button.
8. You will see a pop-up with the next task to complete. Click **Open**.

9. On the next screen, click the **Let’s Get Started** button.
10. To change or designate beneficiaries, click **Manage** on the appropriate plan card.

11. The Insurance Plan will be selected with no option to waive. Click the **Confirm and Continue** button at the bottom of the screen.
12. Use the Plus (+) radio button under Beneficiaries to add one or more beneficiary persons or trusts.
   a. If you already created Beneficiary Persons or Trusts, or checked the **Use as Beneficiary** box when creating your dependent(s), they will be available to select. Otherwise, use Add New Beneficiary or Trust to create a new beneficiary person or trust.
b. For each new beneficiary person, you must enter a first & last name, relationship to you, and an address. To enter an address, click on the Contact Information tab.
c. You may add as many beneficiary persons or trusts as you wish, but the sum of Percentages must be equal to 100% for both Primary and Secondary Beneficiaries.

13. Click **Save**.
14. Once you have made all of your beneficiary designations, click the **Review and Sign** button.
15. Review the Selected Benefits with your new list of beneficiaries.
16. Scroll down to the bottom of the page. Read the Electronic Signature and click the **I Accept** checkbox.

17. Click **Submit**.

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**Electronic Signature**

I hereby apply for participation in the University of Chicago's benefits plan(s) for those benefits for which I am or may become eligible under the terms and conditions of said plan and any present or future amendments thereto, and subject to acceptance of my enrollment.

By selecting the I AGREE button, you certify that:

- You authorize the University of Chicago to deduct from your earnings the required contributions, if any, toward the cost of the plan(s); and
- You cannot change any of your elections for medical, dental, vision, or health and/or dependent care flexible spending accounts until the next open enrollment period, unless you have a qualified life event. Proof of the life event is required and must be submitted within 31 days of the life event effective date.

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18. Click the **View Benefits Statement** button to print your beneficiary change for your records.

   a. You will be able to view your updated beneficiary designations on your Workday profile once the effective date has passed.