

## Change Beneficiaries

### Purpose

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

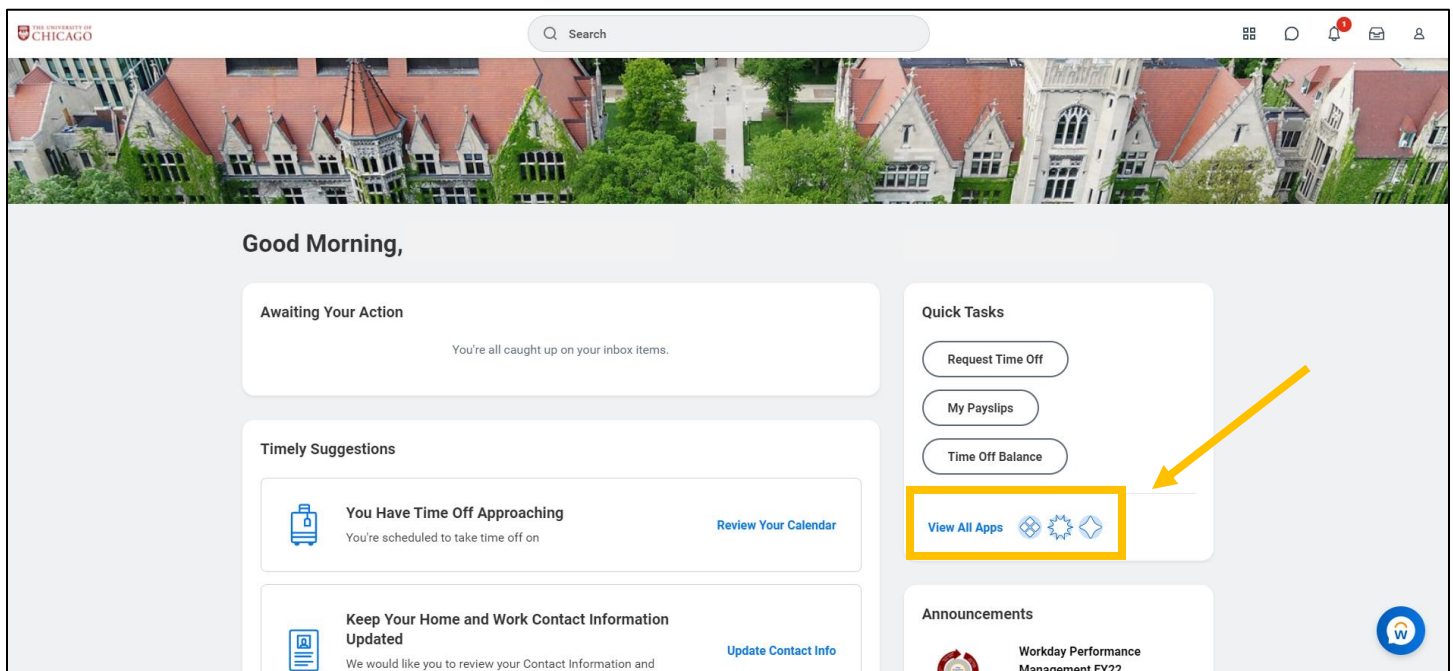
To designate or change beneficiaries for Retirement plans, log into your [TIAA account](#).

### Steps to Change Beneficiaries

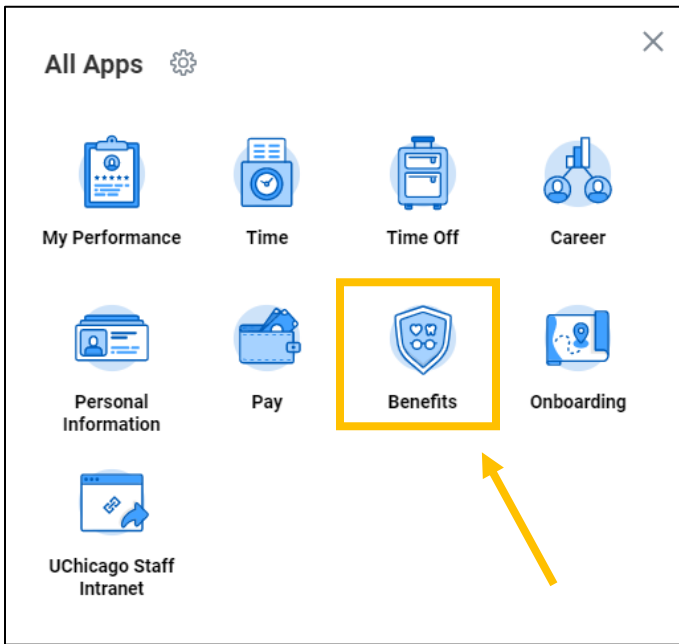
1. Log in to [Workday](#) using your CNet ID and Password.
2. From the Home page, click **View All Apps** at the bottom of the **Quick Tasks** card on the right side of the screen.

### 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.

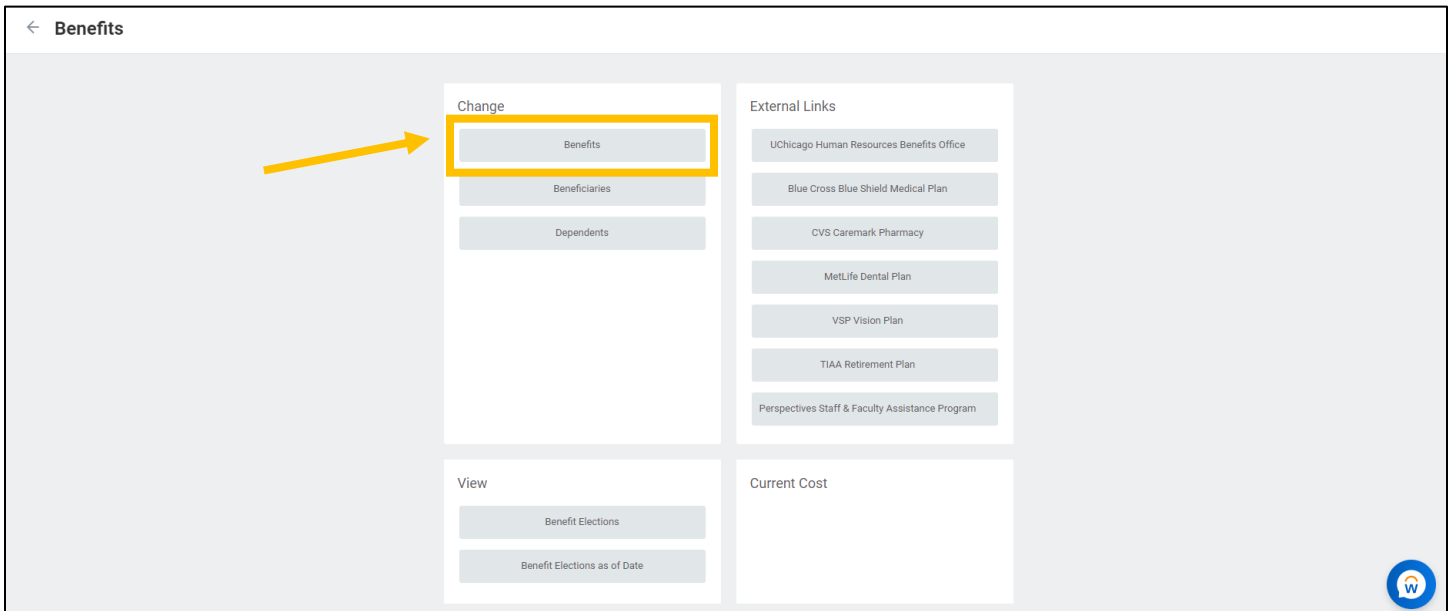


3. Click on the **Benefits** icon.



4. In the **Change** card (top left), click on **Benefits**.

a. **Do NOT select the Beneficiaries or Dependents buttons.**



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.

### Change Benefits

Change Reason \* Beneficiary Change

Effective Date of Change \* 08/26/2021

Submit Elections By 09/01/2021

Benefits Offered  
 Basic Life Insurance  
 Personal Accident Insurance  
 Supplemental Life Insurance

August 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

- Click the **Submit** button.
- You will see a pop-up with the next task to complete. Click **Open**.

**You have submitted**

Up Next: , Change Benefit Elections

[View Details](#)

**Open**

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

### Insurance

<p><b>Basic Life Insurance</b> Sun Life To a Maximum of \$50,000 (Employee)</p> <p>Coverage: 1 X Salary</p> <p><b>Manage</b></p>	<p><b>Supplemental Life Insurance</b> Waived</p> <p>Enroll</p>	<p><b>Personal Accident Insurance</b> Waived</p> <p>Enroll</p>
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- The Insurance Plan will be selected with no option to waive. Click the **Confirm and Continue** button at the bottom of the screen.
- Use the Plus (+) radio button under Beneficiaries to add one or more beneficiary persons or trusts.
  - 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.

## Basic Life Insurance - Sun Life To a Maximum of \$50,000 (Employee)

Projected Total Cost (Monthly)  
\$300.39

### Coverage

Calculated Coverage \$50,000.00

Coverage 1 X Salary

### Beneficiaries

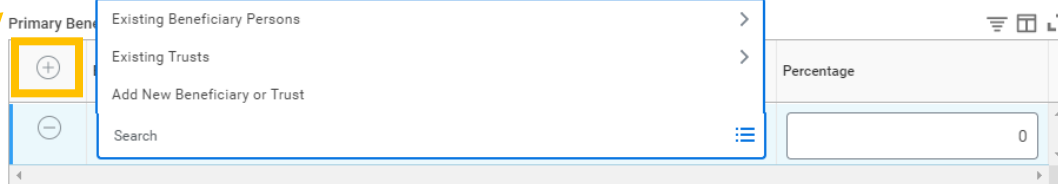
Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiary

- Existing Beneficiary Persons >
- Existing Trusts >
- Add New Beneficiary or Trust
- Search

Percentage

0



- 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.

## Add New Beneficiary or Trust

Relationship \*

Use as Beneficiary

Date of Birth

Age (empty)

Gender

Allow Duplicate Name

Legal Name **Contact Information** National IDs Additional Government IDs Other IDs

Country \*

Prefix

First Name \*

Middle Name

Last Name \*

Suffix

Legal Name    **Contact Information**    National IDs    Additional Government IDs    Other IDs

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**Phone**

Add

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**Address**

Add

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**Email**

Add

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**Instant Messenger**

OK    Cancel

- 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.

**Basic Life Insurance - Sun Life To a Maximum of \$50,000 (Employee)**

Projected Total Cost (Monthly)  
\$305.13

**Coverage**

Calculated Coverage    \$50,000.00

Coverage    1 X Salary

**Beneficiaries**

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 1 item

+	Beneficiary	Percentage
-	X Beneficiary Person 1 ...	100

Secondary Beneficiaries 3 items

+	Beneficiary	Percentage
-	X Beneficiary Person 2 ...	33
-	X Beneficiary Person 3 ...	33
-	X Beneficiary Person 4 ...	34

Save    Cancel

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**.

### 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.

I Accept

[Submit](#) [Save for Later](#) [Cancel](#)



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.