If you elect to have basic and/or supplemental life insurance, you will need to choose at least one beneficiary. In the event these beneficiaries change, or you need to add a beneficiary, follow this process.

Tasks

Before You Begin

Academic/Medical Center Employees

- If you are enrolled UVA's Standard Life Insurance benefit, you will use this Job Aid and update your beneficiaries in Workday by using the Change Life Insurance benefit event.
- **These steps are for Standard Life members only (ORP/MCRP). VRS Life Insurance Members** will use this form instead. If you are in VRS Life (Securian/Minnesota Life), you will **fill out all sections, sign the form, and mail it directly to VRS** using the address on top of the form.
- If you are enrolled in VRS Life Insurance, you will not use Workday to update beneficiaries, but instead will use forms found online at varetire.org.
- If your beneficiaries or trust is already set-up in Workday, but you want to make a change in percentage, change, or drop beneficiaries, then Initiate a **Qualified Life event** using the reason Change Life Insurance.

University Physician's Group Employees

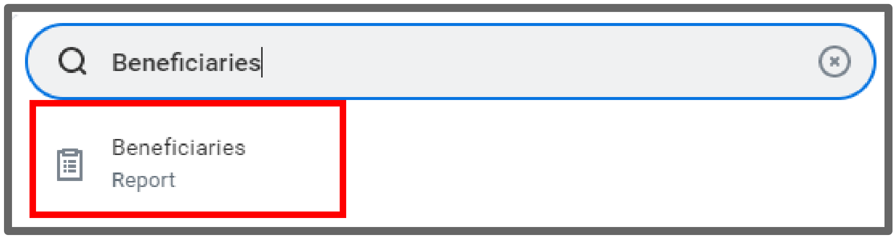
Principal Life Insurance members can update their beneficiaries at any time in Workday by using the Change Life Insurance event within the Benefits application. This will update the Principal Life Insurance plans only. Use the links below to update your beneficiaries for other UPG benefit plans.

- https://MyBenefits.MetLife.com – MetLife's BEST Plan for UPG Providers or Director Level Positions and above
- www.tiaa.org/upg. – TIAA's 401k, Retirement Investment Account, or 403b account.
- www.NetBenefits.com - Fidelity's for your 403b account.

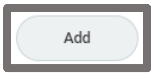
- Any questions can be directed to rBenefits@hscmail.mcc.virginia.edu.

Change Existing or Create New Beneficiary or Trust

1. From the Workday search feature, enter 'Beneficiaries' and select the **Beneficiaries** report.



2. Click the **Add** button.



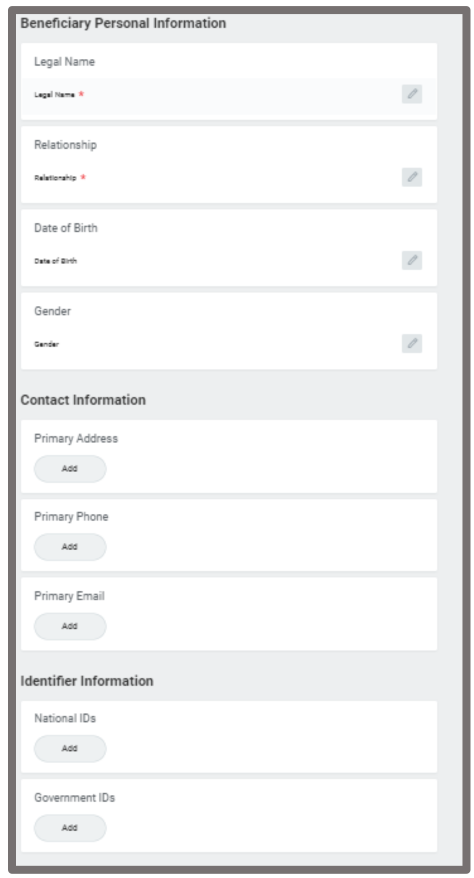
3. Choose to **Create a New Beneficiary** or **Create a New Trust as Beneficiary**
4. Click **OK**

Create New Beneficiary

5. Choose **Create a New Beneficiary** and click **OK**
6. Fill out all required pieces:

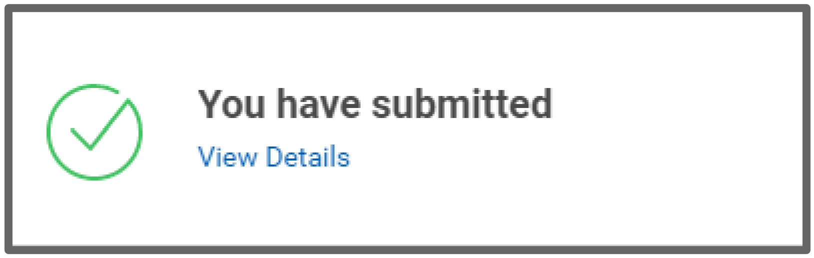
- Legal Name
- Relationship
- Date of Birth
- Gender
- Fill out contact information as completely as possible (phone number and address at minimum)
- At least one identifier (National ID – i.e., Social Security Number, or Government ID)

7. Click Submit



8. You will see a 'You have submitted' confirmation with a View Details link. Click the View Details link to view the process.

9. Click Done.



This sets the beneficiaries up, so they can then be added to your plan in a change life insurance event.

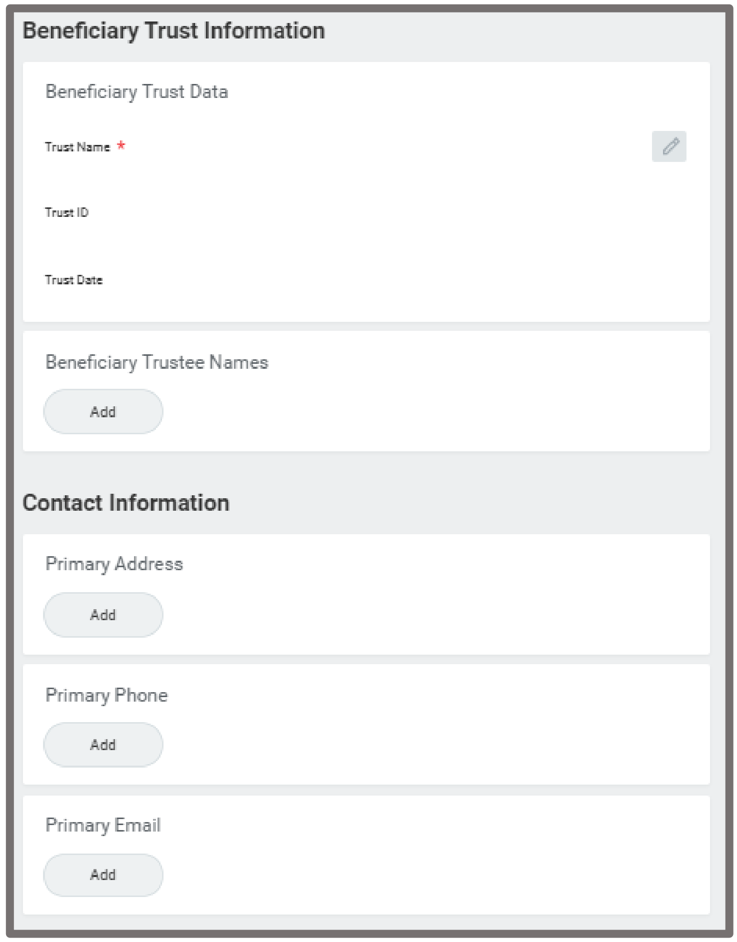
Create a New Trust as Beneficiary

1. Choose **Create a New Trust as Beneficiary** and click **OK**

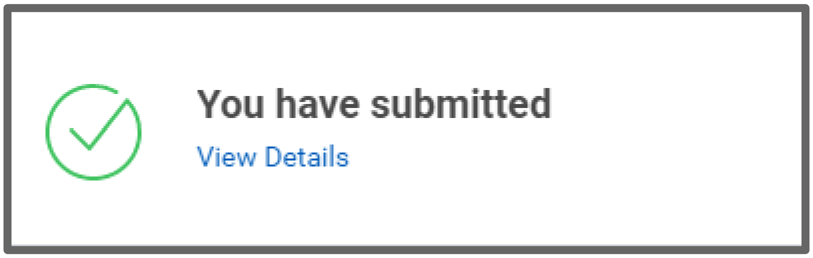
2. Fill out all required pieces:

- Trust Name
- Trust ID
- Trust Date
- You can also fill out Beneficiary Trustee Names, and Contact Information.

3. Click **Submit**



4. You will see a ‘You have submitted’ confirmation with a View Details link. Click the View Details link to view the process.
5. Click Done.



This sets the beneficiaries up, so they can then be added to your plan in a change life insurance event.

Edit or Delete Beneficiary

To edit or delete an existing beneficiary, you will navigate to Beneficiaries button under the Change column of the Benefits application. Then follow these steps:

1. Click **Edit** or **Delete**, depending on your desired action.
2. If you selected **Delete**, enter the **Effective Date** you would like the beneficiary to be removed. ***Note***: today’s date will default.
3. Click **Submit**.
4. If you selected **Edit**, review and change the existing information for the beneficiary.
5. Click **Submit**.