Change Life Insurance events may be submitted throughout the year, but if the requested change requires Evidence of Insurability (EOI), further instructions will be sent to your Workday inbox.

VRS Life Insurance members must use the vendor forms provided at varetire.org.

Tasks

- Before You Begin
- Change Life Insurance
- Add New Beneficiary
- Add New Trust

Before You Begin

Academic/Medical Center Employees:

The Standard Life Insurance members can update Life Insurance and Beneficiary information at any time in Workday by using the Change Life Insurance event within the Benefits application

- Using the Change Life Insurance event in Workday will update The Standard Life Insurance plans only.
- If you are in VRS Life Insurance, you will visit varetire.org to print and complete the VRS beneficiary forms, then fax them to UVA HR at 434-924-4486.
- Any questions can be directed to AskHR@virginia.edu.

University Physician's Group Employees:

Principal Life Insurance members can update Life Insurance Beneficiaries at any time in Workday by using the Change Life Insurance event within the Benefits application. You can also decrease your current supplemental life insurance at any time. If you are trying to increase the amount of coverage of your supplemental life outside of a Qualifying Life Event, you will need to submit documentation to Principal. Look for a follow up inbox task in Workday after you submit your request for a form to print with instructions.

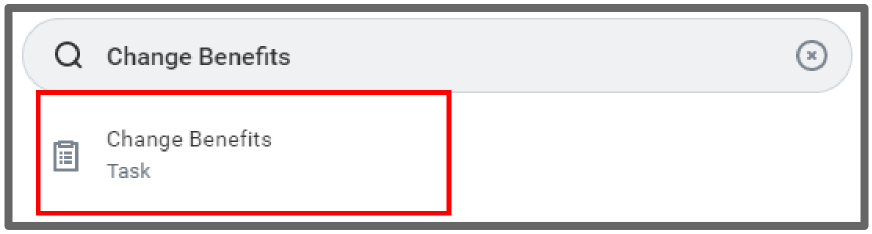
- Using the Change Life Insurance event in Workday will update The Principal Life Insurance plans only. Only Admin Staff and Manager level UPG employees have Principal Life. UPG team members in a Provider or Director level position and above have MetLife Life Insurance
- https://MyBenefits.MetLife.com to change supplemental life coverage amounts or beneficiaries. If outside of a 30-day hire or Qualifying Life Event, you will need to work with MetLife to supply evidence of insurability.
- www.tiaa.org/upg.to update your beneficiaries with TIAA for your 401k, Retirement

Investment Account, or 403b account.

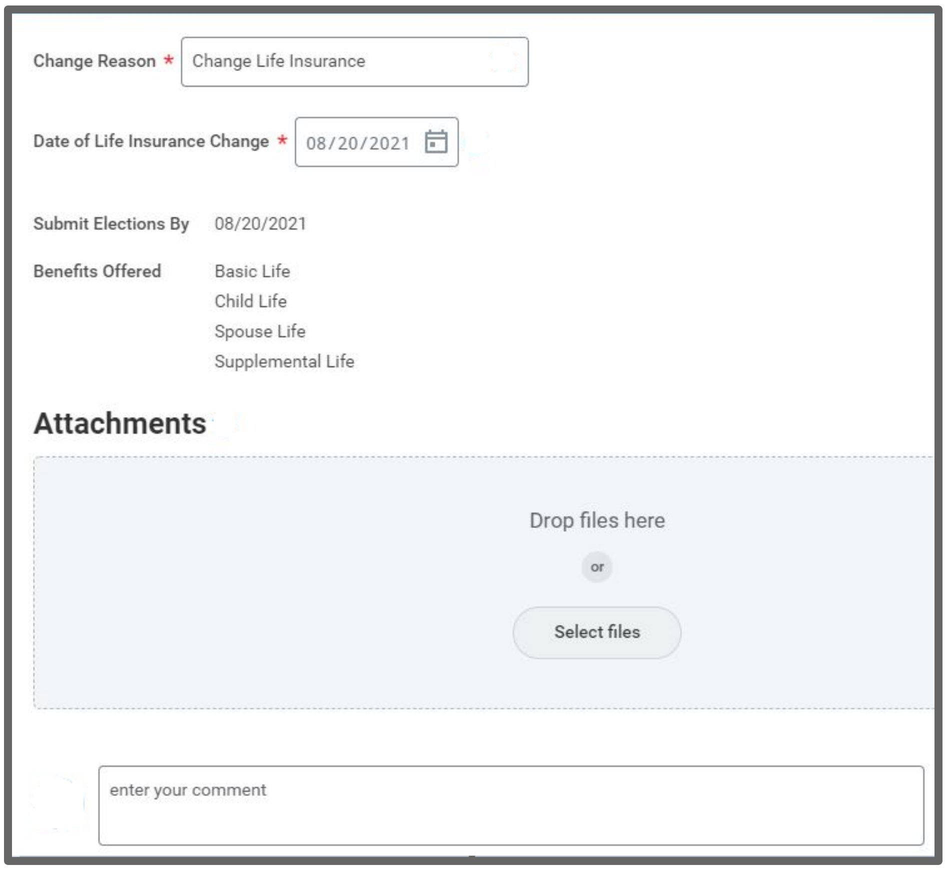
- www.NetBenefits.com to update your beneficiaries with **Fidelity** for your 403b account.
- Any questions can be directed to **rBenefits@hscmail.mcc.virginia.edu**.

Change Life Insurance

1. From the Workday search feature, enter ‘Change Benefits’ and select the **Change Benefits** tasks.

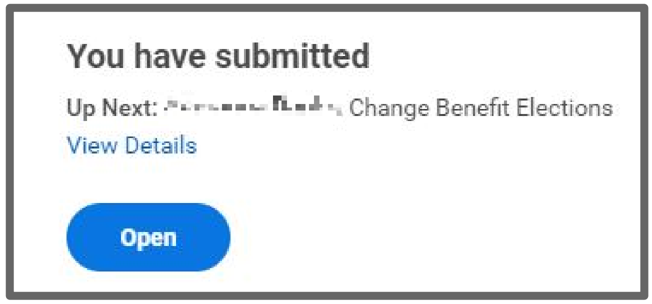


2. Click the **Change Reason** drop-down to select **Change Life Insurance.**
3. Enter **today’s date** and click **Submit**.



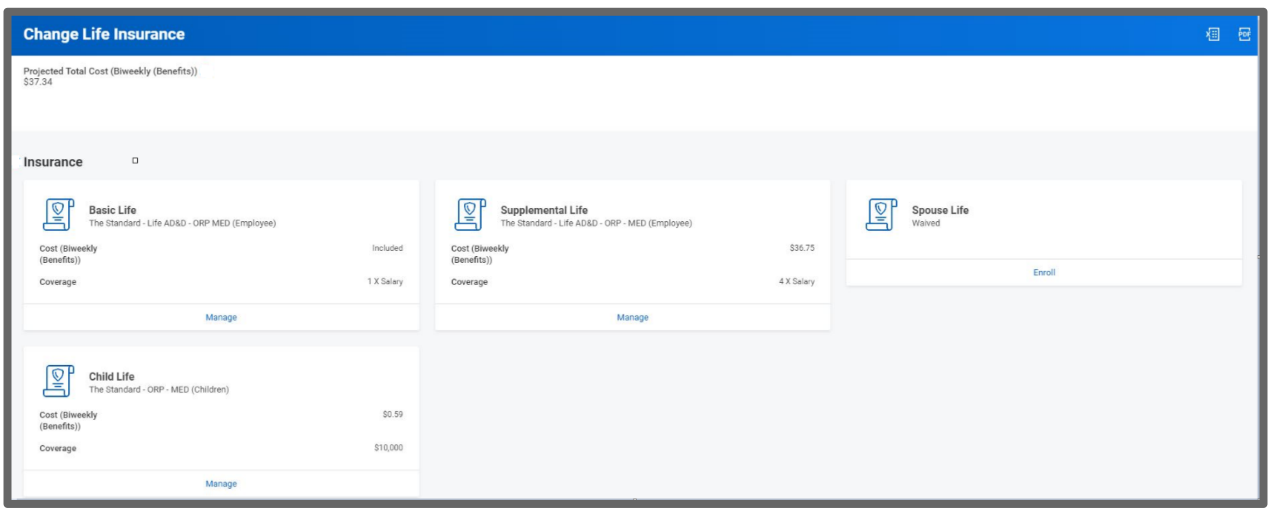
4. You will receive a 'You have submitted' confirmation with an **Open** button that takes you to the next step. Click the **Open** button.

   If you click out of the confirmation, this step will be in your inbox.

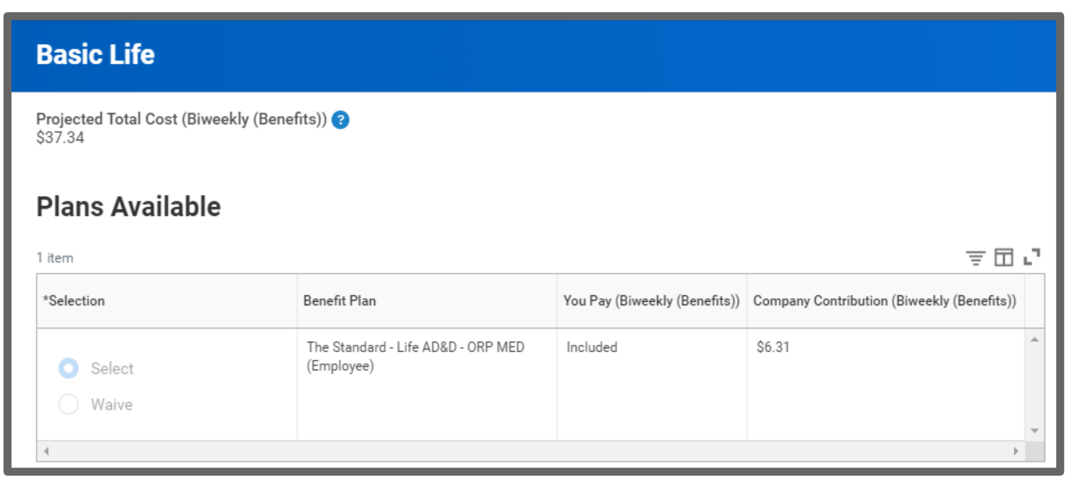


5. Click the **Let's Get Started**  button.

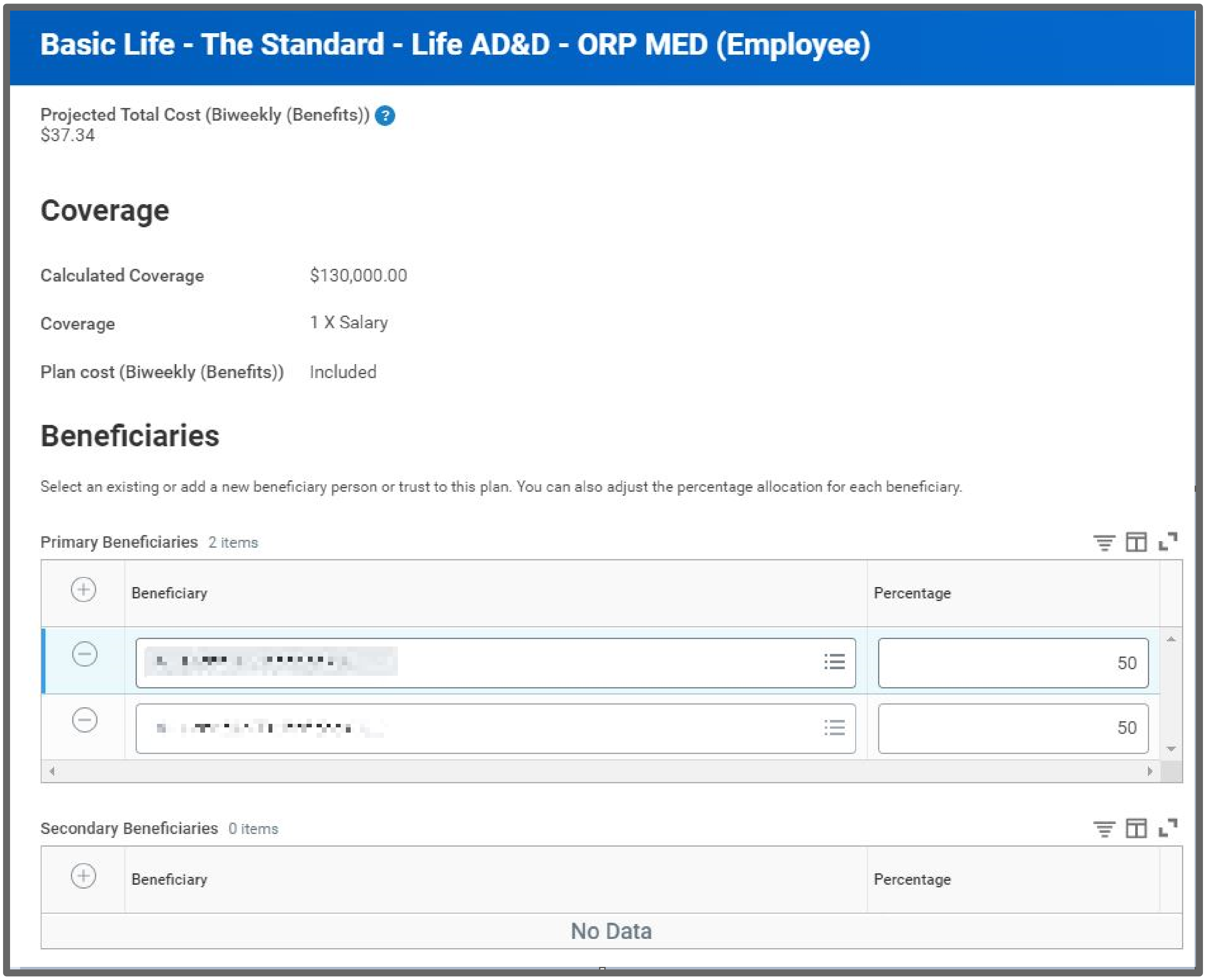
6. Your choices for Life Insurance will display. Click on the tile for the plan you'd like to enroll, edit, or waive. If you're already enrolled in a plan, the button at the bottom of the tile will display as Manage. Otherwise, the button will display as Enroll. Click each tile you'd like to enroll, edit, or waive.



7. After selecting the tile you'd like to enroll, edit, or waive, click on the radio button in the Selection column to **Select** or **Waive** the plan and click the **Confirm and Continue** button.



8. Based on your choice, you will see the cost at the top of the screen. You will be directed to define your beneficiary. See the sub step below if you wish to Add/Change Beneficiaries, otherwise click Continue.

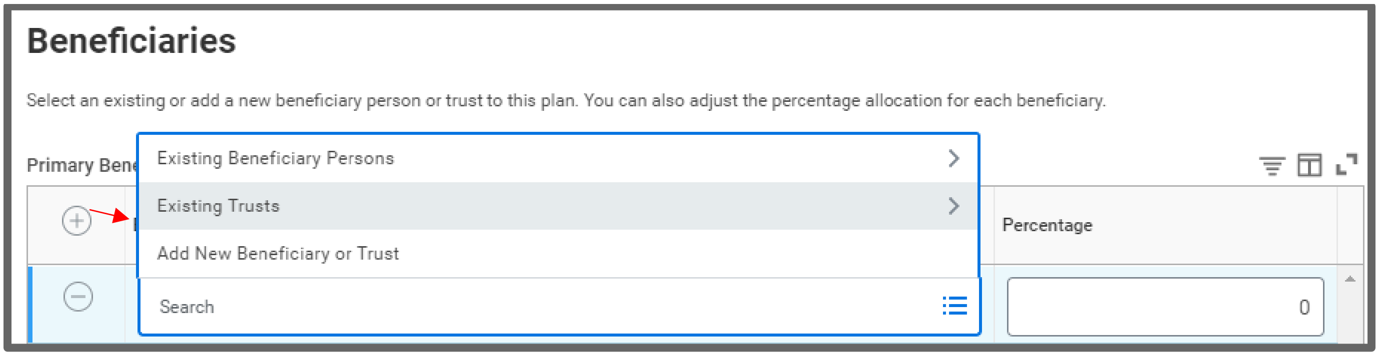


9. To delete a beneficiary from your Life Insurance, click the minus button in front of the name.

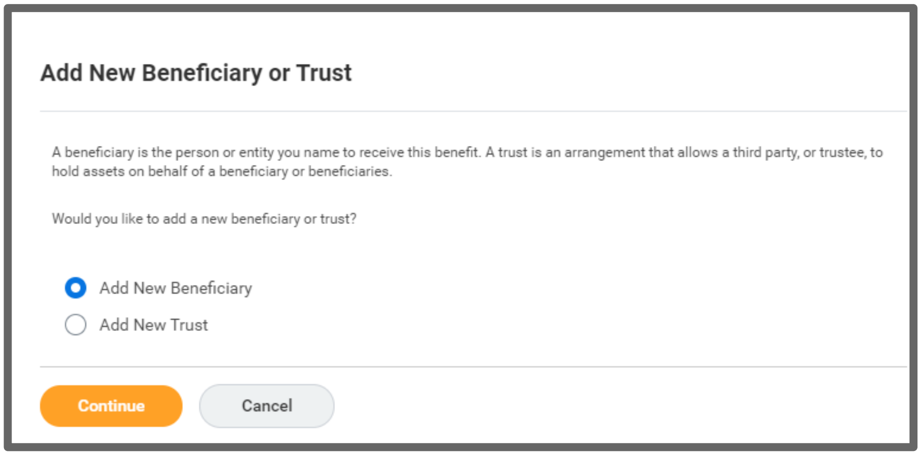
10. To change the percentage, alter the number in the percentage column.

11. To add a new Beneficiary, click the plus button and use the prompt to click on one of the following options:

Note: To use the Existing Beneficiary Persons or Existing Trusts options, the person must already be added to your plan as a beneficiary or trusts.

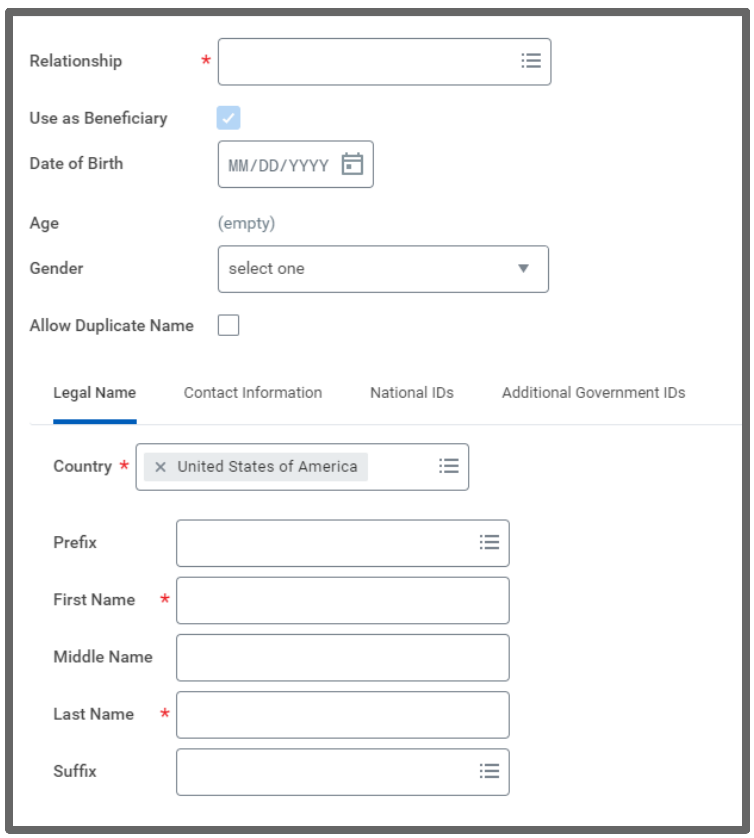


Add New Beneficiary



If you selected to Add New Beneficiary or Trust you will see the option to choose either Add New Beneficiary or Add New Trust.

1. With **Add New Beneficiary** selected, click the **Continue** button.

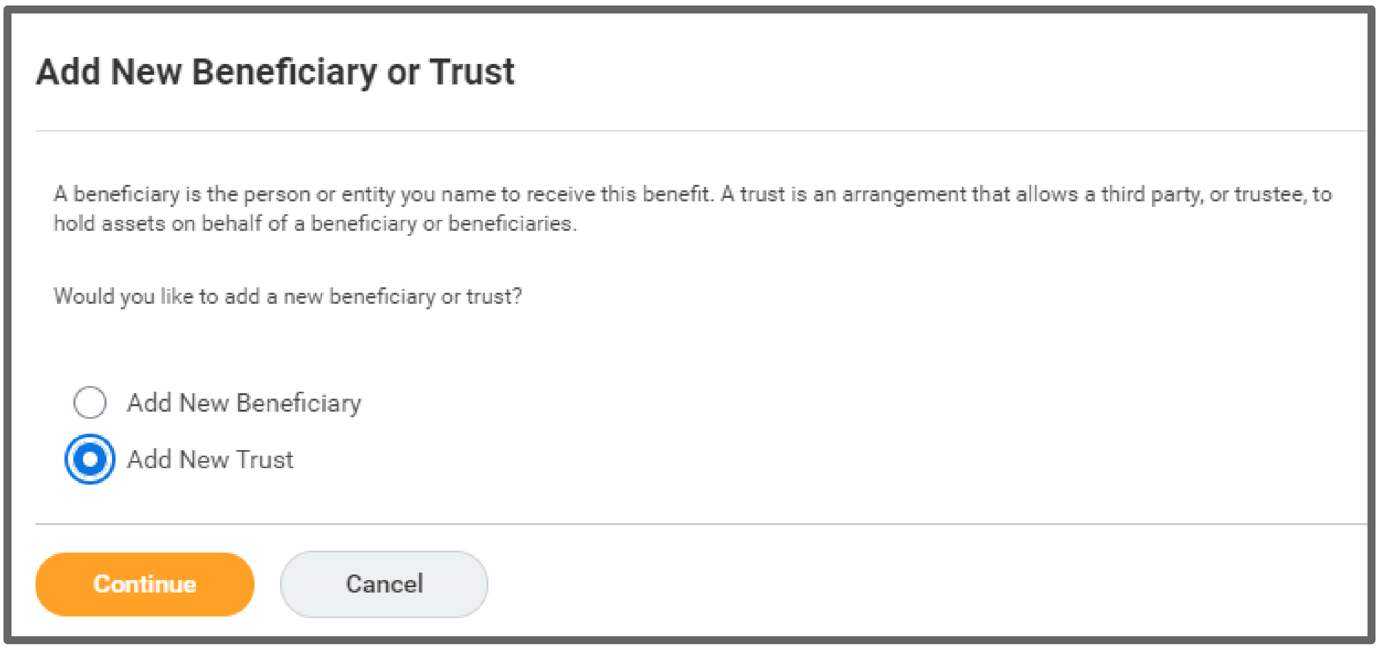


2. Fill out all required information starting with Relationship.
   - Date of Birth
   - Gender
   - Legal Name
   - Click the Contact Information tab and complete as much as possible.
   - Click the National IDs tab to enter the Social Security Number, or Government ID.
3. Click OK.

4. Once the new person is added, they will show under your Primary Beneficiaries to allow you to alter the Percentage column, if desired.

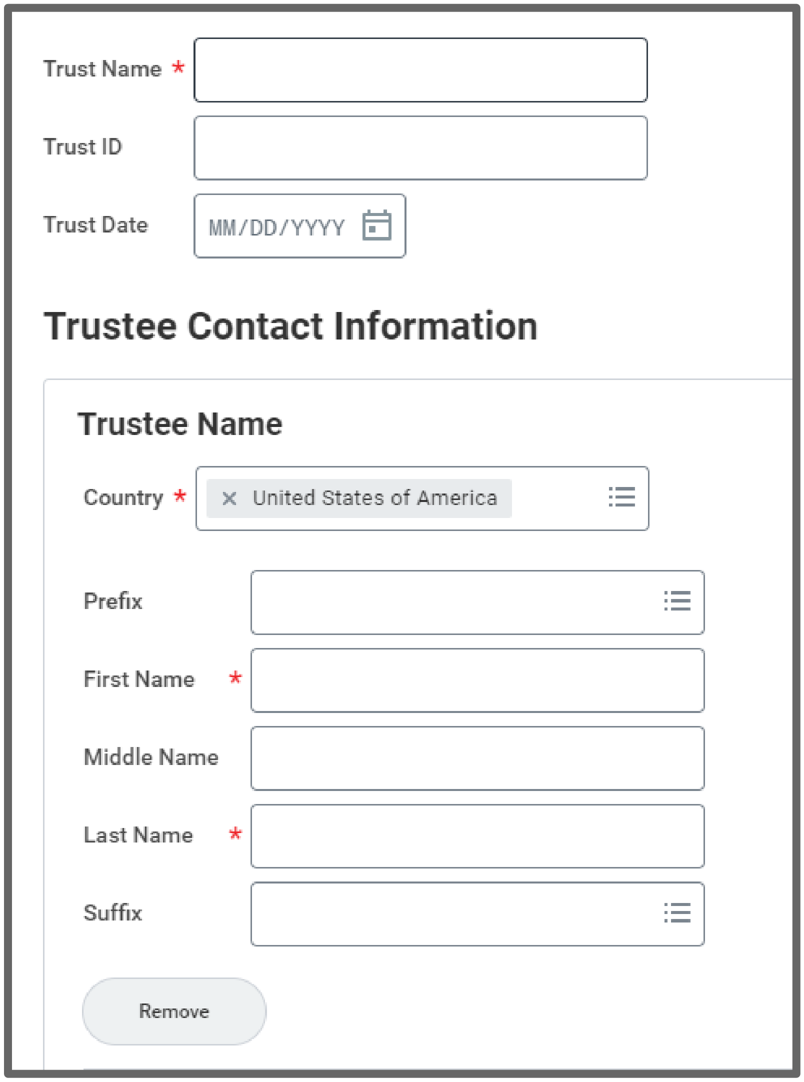
Add New Trust

To add a New Trust, follow these steps:



1. Select the radio button in front of **Add New Trust** and click Continue.

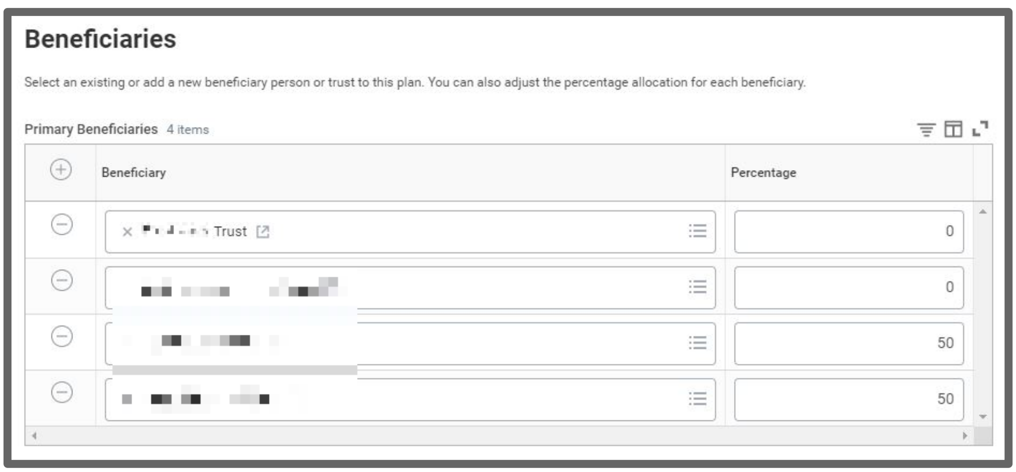
2. Fill out all required pieces:
    - Trust Name
    - Trust ID
    - Trust Date
    - You can also fill out Beneficiary Trustee Names and scroll down to enter the Contact Information.
3. Click **OK**.



4. The Trust will now show to edit as desired.

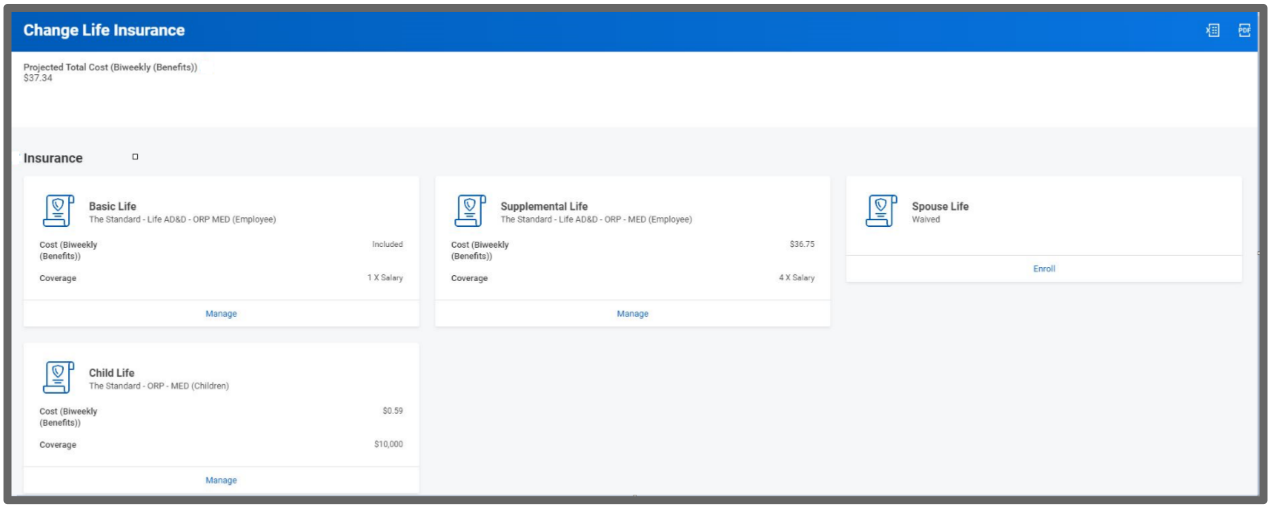
Note: You must add a percentage value.

5. When you are done adding and editing, click the **Save** button.



6. You will receive a submit confirmation.

7. Click on the next plan you wish to edit, manage, or enroll and repeat the steps.



8. If this is the only change, click the **Review and Sign** button.

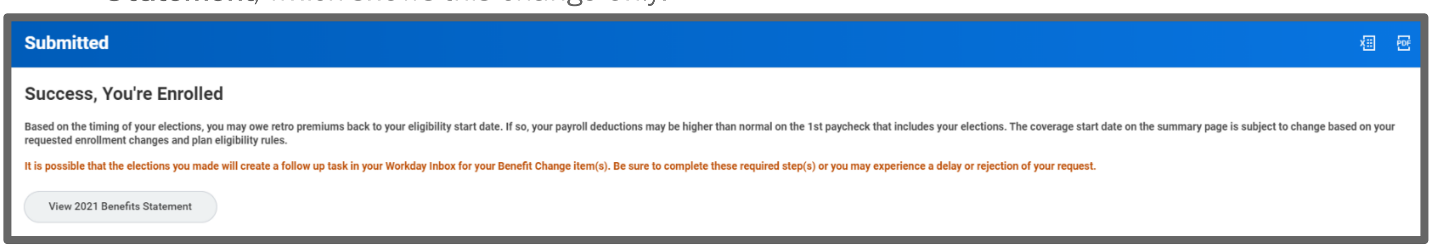
9. If you have more benefit changes to add, click the **Home** button to add additional changes.

10. After clicking the **Review and Sign** button, scroll through the **View Summary** of your proposed change.

11. If you are happy with the change, scroll down to the **Electronic Signature** section and click the '**I Accept**' checkbox.

12. Click **Submit**.

13. You will receive a 'Success! You've Enrolled' confirmation with a link to a **View 2021 Benefits Statement**, which shows this change only.



Note: This button gives you the option to print your change request.

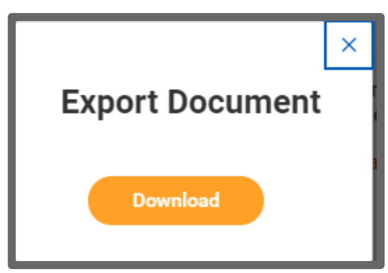
14. Click the **View 2021 Benefits Statement** button.

15. Click the **Print** button.

16. Click the **Download** button.

17. Your document displays, which allows you to **Open** and **Print**.

18. Click the **Home** button.



19. Print a copy for your records by clicking **Print**. This will open a PDF of the page that you can either save or print.

20. Click **Done**.