EMPLOYEE JOB AID

CHANGE BENEFICIARY

To update the beneficiary percentages (primary and/or contingent) for your Life or AD&D plans, please follow the instructions under “To Change Your Beneficiary Percentages for Life or AD&D Plans”.

To update demographic information (e.g., name, address, phone number, etc.) related to an existing beneficiary, please follow the instructions under “Updating the Demographic Information for an Existing Beneficiary”.

To update demographic information (e.g., name, address, phone number, etc.) related to an existing dependent enrolled in one of your insurance plans, please follow the instructions under “Updating the Demographic Information for an Existing Dependent”.

TO CHANGE BENEFICIARY PERCENTAGES FOR LIFE OR AD&D PLANS

1. Click on the Benefits Worklet and select Change Benefits.
   
   ![Benefits Worklet](image)

2. For Benefit Event Type, select Beneficiary Change Event and enter today’s date as the Benefit Event Date.
3. Click **Submit**.

4. Click **Open** to access your **Beneficiary Change Event**.

5. The first page that appears will provide an overview of your current benefit elections (plans are not editable). Click **Continue** in the bottom left corner.

6. If you have dependents who you have not entered a Social Security Number for, you will need to provide that information now. If you do not have their Social Security Number available type in that you will provide the SSN at a later date. Click **Continue** in the bottom left corner.

7. You will enter your beneficiaries on the next page by clicking the + sign next to each Benefit Plan.
8. Once you click the + sign, a row will appear below the plan where you are adding your beneficiary designations. In the area highlighted, you will see a menu where you can either select **Beneficiary Persons** (to select a Beneficiary that you have already entered into the system) or select **Create** to create a new beneficiary.

9. If you select **Create**, to add a new beneficiary, follow the prompts to enter all the required information and click **OK**.
10. Once you have selected your beneficiary, you will need to assign them as a **Primary** or **Contingent Beneficiary** as well as assign a percentage to each. Percentage for Primary Beneficiary must total 100% and percentage for Contingent Beneficiary must also total **100%**. You must assign primary beneficiaries for each Benefit Plan before you are able to click **Continue** in the bottom left corner to proceed.

11. Once you click **Continue**, you will be taken to the screen below where you will need to provide your **Electronic Signature** and click **Submit**.
UPDATING THE DEMOGRAPHIC INFORMATION FOR AN EXISTING BENEFICIARY

If you have an existing beneficiary whose name, address, phone number, etc. needs to be updated, you can do so by following these instructions. Before proceeding, please note the following:

- If your beneficiary shares an address with you (as the employee), and your own address needs to be updated, you must make this update in your Workday Profile > Personal tab. When you update your home address, any beneficiaries or dependents that share your home address will automatically be updated.

- If your beneficiary does not share an address with you, please follow the below instructions to update their address accordingly.

- If your beneficiary is also a dependent on any of your health insurance plans, please follow the Update Dependent Information Instructions below and update the information there instead.

1. Click on the Benefits Worklet and select Change Beneficiaries.

2. Find the beneficiary that needs updating and click Edit.
3. Scroll through the page until you find the information that needs updating. Click the pencil icon to edit the information. Click the checkmark when you are done editing to save your changes.

4. When all the data has been updated, click **Submit** on the bottom left corner of the page.
UPDATING THE DEMOGRAPHIC INFORMATION FOR AN EXISTING DEPENDENT (SOMEONE ENROLLED IN A BOOZ ALLEN INSURANCE PLAN)

If you have an existing dependent (someone who is enrolled in a Booz Allen insurance plan) whose name, address, phone number, etc. needs to be updated, you can do so by following these instructions. Before proceeding, please note the following:

- If your dependent shares an address with you (as the employee), and your own address needs to be updated, you must make this update in your Workday Profile > Personal tab. When you update your home address, any beneficiaries or dependents that share your home address will automatically be updated.

- If your dependent does not share an address with you, please follow the below instructions to update their address accordingly.

1. Click on the Benefits Worklet and select Change Dependents.

2. Find the dependent that needs updating and click Edit.
3. Scroll through the page until you find the information that needs updating. Click the **pencil icon** and make updates as necessary. Click the **checkmark** when you are done editing to save your changes. When all the data has been updated, click **Submit** on the bottom left corner of the page.

Note that if you are updating the address for a dependent with a non-US country, you will need to check the Western Script box and complete the required fields. The Western Script box will automatically appear whenever a non-US country is selected.

<table>
<thead>
<tr>
<th>Dependent Personal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Legal Name</strong></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
</tr>
<tr>
<td><strong>Date of Birth</strong></td>
</tr>
<tr>
<td><strong>Age</strong> 20 years, 1 months, 21 days</td>
</tr>
<tr>
<td><strong>Date of Death</strong></td>
</tr>
</tbody>
</table>

![Image of dependent personal information form](image-url)