The Aaon Group

Job Aid

Benefits: Manage Beneficiaries (Mobile App)

Employees can add, update, or remove beneficiaries in the Workday Mobile App during a benefit change.

Access Beneficiaries in Mobile

1. Open the Workday Mobile App
2. Tap Benefits and Pay
3. Select Change Benefits
4. Choose Change Beneficiaries as the reason
5. Enter the benefit event date
6. Tap Submit
7. Select Open
8. Tap Let's Get Started

Add a Beneficiary

1. Select Manage under the applicable life insurance plan
2. Tap Confirm and Continue
3. Select Add New
4. Choose:
    - Add Beneficiary, or
    - Select an existing beneficiary
    - Remove a Beneficiary: select the individual and tap Delete
5. Enter required information
6. Tap Done
7. Enter the benefit percentage
8. Tap Save