

HOW TO UPDATE YOUR BENEFICIARIES IN WORKDAY



Step 1:

- Log into Workday by going to sunrun.okta.com and clicking on the Workday link
- Click “Benefits” under Change
- In the Benefit Event Type field, select “Beneficiary Change”
- Enter the date in the Benefit Event Date open field

If you need to make benefit changes based on a Life Event of Marital Status Change (Divorce/Dissolution), please go to your Home Page > Benefits Work section to edit the relationship of your Spouse/Domestic Partner to “Ex-Spouse” or “Ex-Domestic Partner”. This will automatically flow into the Benefit Enrollment process.

Benefit Event Type * Beneficiary Change

Benefit Event Date * MM / DD / YYYY

Submit Elections By (empty)

Enrollment Offering Types (empty)

Attachments

Step 2:

Click “Submit,” then “Open”

Open

> Details and Process

Done

Step 3:

Select the line of coverage you would like to update by clicking on the plus (+) sign next to Requires Beneficiary

Designate or change beneficiaries for your life insurance coverages. 401(k) Plan beneficiaries must be updated on the Employer website

Benefit Plan	Provider Website	Requires Beneficiary	*Beneficiary	*Primary Percentage
Basic Life & AD&D - Prudential (Employee)	Prudential	+	+	

Continue Save for Later Go Back Cancel

Step 4:

Click the drop-down menu to select your beneficiary, or add a new one by clicking “Create” if you do not already have your beneficiary listed

Benefit Plan	Provider Website	Requires Beneficiary	*Beneficiary	*Primary Percentage
Basic Life & AD&D - Prudential (Employee)	Prudential	+	+	

Continue Save for Later Go Back Cancel

Step 5:

Enter your beneficiary's information in the open fields and click "Continue"

Enter your beneficiary information.

Relationship *

Use as Beneficiary

Date of Birth

Age (empty)

Gender

Full-time Student

Student Status Start Date

Student Status End Date

Disabled

Step 6:

Designate the percentage for your beneficiary

*Primary Percentage / Contingent Percentage

Primary Percentage

Contingent Percentage

Step 7:

Click "I Agree" and hit "Submit"