

Standard Operating Procedure: Workterra

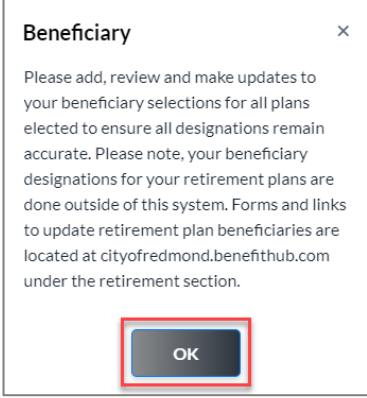
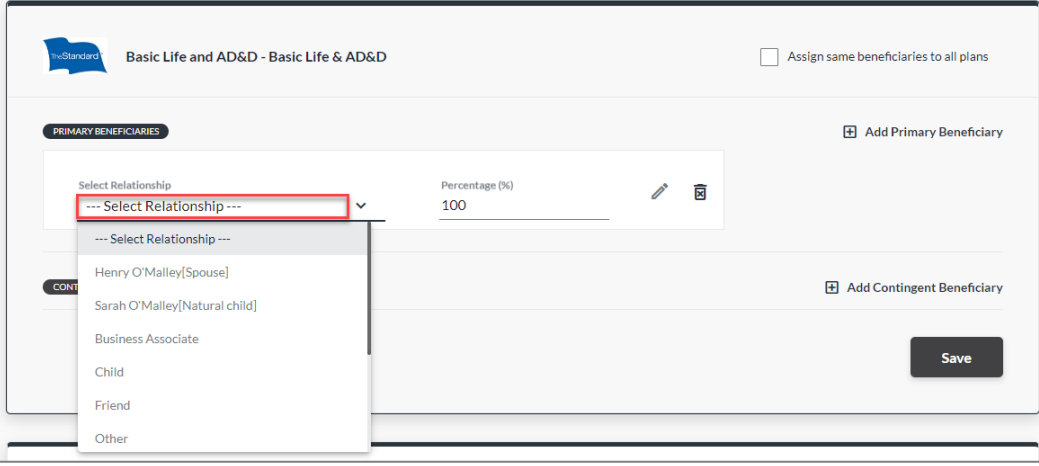
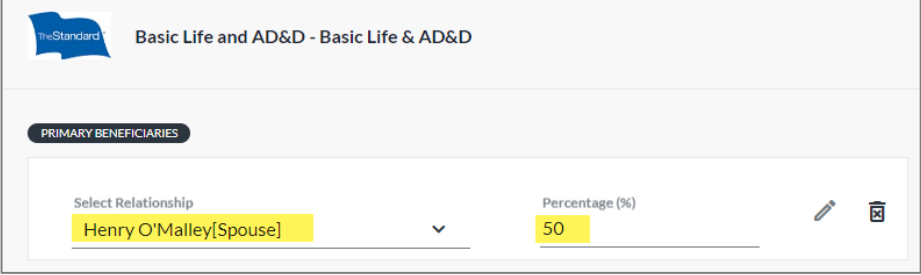
Beneficiary Designation Overview



Purpose: The beneficiary designations in Workterra apply to life and accidental death insurance paid for by the City of Redmond and life and accidental death insurance paid for by the employee.

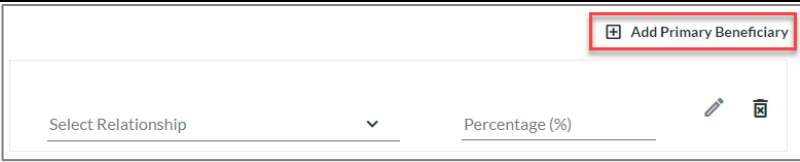
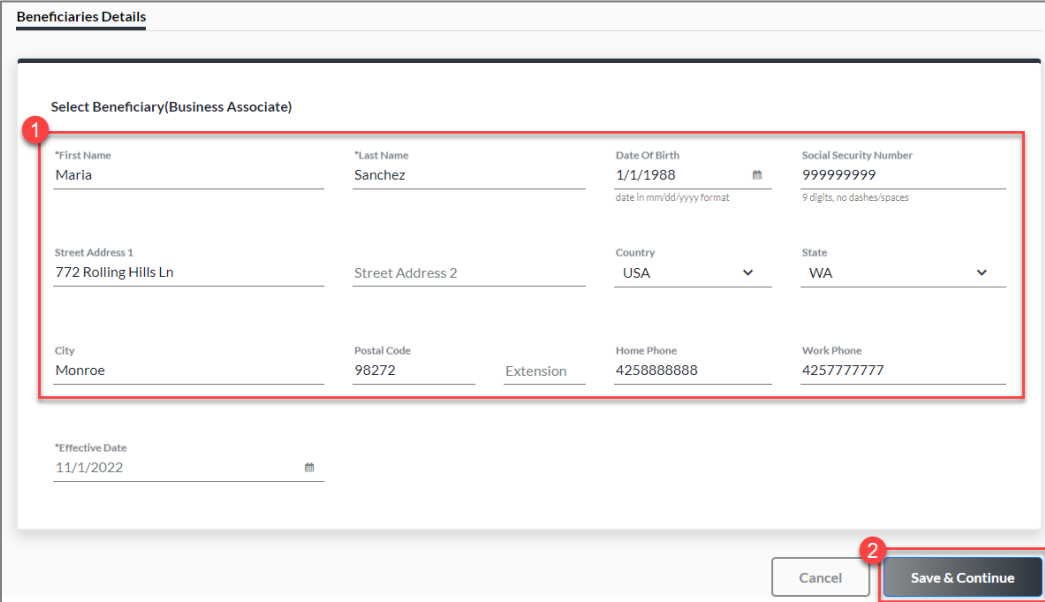
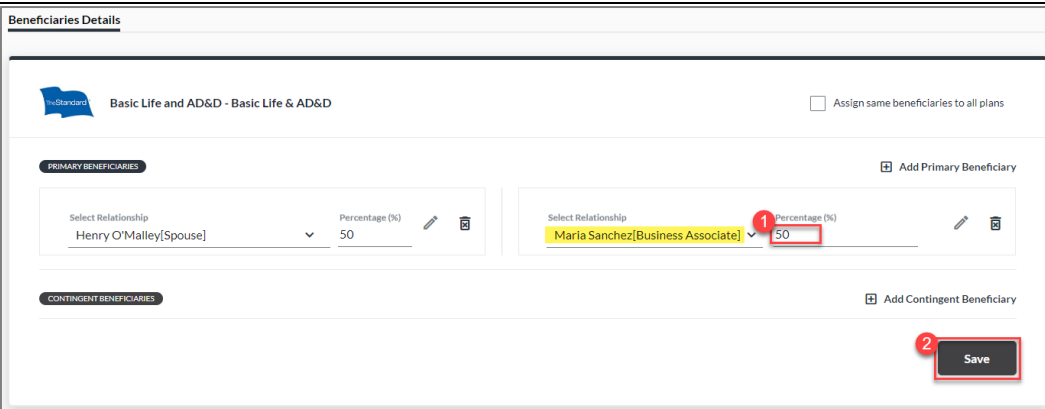
Beneficiary designations on coverage purchased for a spouse, domestic partner or child are not required. The employee purchasing this coverage is the beneficiary should there be a death claim on the insured dependent.

Audience: Benefits eligible employees

Step	What to do	Visual Aid
1	Beneficiaries will be designated as part of an enrollment process. Click "OK" on the Beneficiary pop-up window.	
2	On the Beneficiaries page, scroll down to the "Beneficiaries Details" section. Under "PRIMARY BENEFICIARIES," click on the "Select Relationship" drop-down menu.	
3	<p>Select the relationship of the beneficiary that will be chosen and type the percentage of benefit for this individual to receive.</p> <p>Note: If the beneficiary is a dependent they will already exist in Workterra and their name/s will appear by this relationship.</p>	

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4	<p>Click "+ Add Primary Beneficiary." New blank "Select Relationship" and "Percentage (%)" fields will appear.</p>	
5	<p>Select a relationship. If a relationship is chosen with no name attached, Workterra opens up the Beneficiaries Details section. In this example, a Business Associate was chosen and the person's details were not yet in Workterra. Complete the form and then click "Save & Continue."</p> <p>Note: First and last name are required. Address, phone number, and other relevant information is optional, but make it easier locate and notify beneficiaries in the event of death provide as much information as possible.</p>	
6	<p>Workterra returns to the "Beneficiary Details" section. The newly created beneficiary will now be listed by name and relationship. Enter a percentage. Follow these steps to add other beneficiaries as needed to bring the total to 100%. When done, click "Save."</p>	

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7	Click "Add Contingent Beneficiary" to add contingent beneficiaries in the event the primary beneficiaries are unavailable. Follow the same steps above to add them and bring them to 100%.	
8	If desired, check mark the box to "Assign same beneficiaries to all plans" and click "OK" on the "Beneficiary" pop-up window. Otherwise, choose specific primary and contingent beneficiaries for each plan listed.	
9	Click "OK" to the next "Beneficiary" pop-up window.	
10	When done, click the "Save & Continue" button.	

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<p>11</p> <p>Beneficiary changes can be made at any time. Access the "Beneficiaries Details" page at any time from the homepage by clicking on the "Manage Beneficiaries" Quick Link.</p> <p>Note: It can also be accessed via the "My Benefits" drop-down menu by selecting "Manage Beneficiaries."</p>		
<p>12</p> <p>To edit beneficiaries, click the "Edit" button.</p>		
<p>13</p> <p>To edit an individual beneficiary, click the pencil icon. To remove a beneficiary, click on the trash can icon.</p>		

Verification of competency: A person is considered to have mastered this task when they can perform all steps listed above without any assistance.

Revision History		
Revision Date	Summary of revision	Revision Author
10/5/2022	Initial development of SOP	D Emami
11/22/2022	SME Review	N Bruce