

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.	Beneficiary × Please add, review and make updates to your beneficiary selections for all plans elected to ensure all designations remain accurate. Please note, your beneficiary designations for your retirement plans are done outside of this system. Forms and links to update retirement plan beneficiaries are located at cityofredmond.benefithub.com under the retirement section.
2	On the Beneficiaries page, scroll down to the "Beneficiaries Details" section. Under "PRIMARY BENEFICIARIES," click on the "Select Relationship" drop- down menu.	Beneficiaries Details Image: Select Relationship Image:
3	Select the relationship of the beneficiary that will be chosen and type the percentage of benefit for this individual to receive. Note: If the beneficiary is a dependent they will already exist in Workterra and their name/s will appear by this relationship.	PRIMARY BENEFICIARIES Select Relationship Henry O'Malley[Spouse]



4	Click "+ Add Primary Beneficiary." New blank "Select Relationship" and "Percentage (%)" fields will appear.	▲ Add Primary Beneficiary Select Relationship ✓ Percentage (%) ☑
5	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." 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	Beneficiaris Details Select Beneficiary(Business Associate) Tirst Name "Last Name Maria Sanchez J1/J1/988 "Bogspropping" Street Address 1 Country 7272 Rolling Hills Ln Street Address 2 City Pastal Code Morroe 98272 Extension 4258080888 4258080888 425777777
6	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 "	Beneficiaries Details Image: Basic Life and AD&D - Basic Life & AD&D Image: Basic Life and AD&D - Basic Life & Ad&D - Basic Life & Ad&D - Basic Life & Ad&D - Basic L



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%.	Residence Assign same beneficiaries to all plans PRIMARY BENEFICIARIES 02. Maria Sanchez (Business Associate) 50% O1. Henry O'Malley (Spouse) 50% 02. Maria Sanchez (Business Associate) 50% Edit Edit
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.	REMARKY EXHERCEARES 01. Sarah O'Malley Controder Cancel Control Cancel
9	Click "OK" to the next "Beneficiary" pop-up	Beneficiary ×
10	window.	Please add, review and make updates to your beneficiary selections for all plans elected to ensure all designations remain accurate. Please note, your beneficiary designations for your retirement plans are done outside of this system. Forms and links to update retirement plan beneficiaries are located at cityofredmond.benefithub.com under the retirement section.
10	When done, click the "Save & Continue" button.	Reset Save & Continue



11	Beneficiary changes an be made at any ime. Access the	Welcome - TEST Regular E (Employee) TE V	
	"Beneficiaries Details"	Current Benefits >	
	page at any time from	✓ Basic Life & AD&D -	
	clicking on the	✓ Survivor Life -	
	"Manage Beneficiaries"	✓ Long Term Disability	
	Quick Link.	✓ Employee Assistance Program -	
	Note: It can also be accessed via the "My	Out Of Pocket \$0.00/Bi-Monthly	
	Benefits" drop-down menu by selecting	∞ Quick Links	
	"Manage Beneficiaries."	City of Redmond Benefits Hub	
		Initiate Qualifying Events	
		Plan Comparison Tool	
		Manage Benenciaries	
12	To edit beneficiaries, click the "Edit" button.	Basic Life and AD&D - Basic Life & AD&D	
		PREMANY VEHICE/CAMPES 01. Henry O'Malley 50% 02. Maria Sanchez 50% (Spouse) (Business Associate)	
		CONTINUEDRI BENEFICARIES 01. Sarah O'Malley 100% (Child)	
		Edit	
13	To edit an individual beneficiary, click the	Selast Delationship	
	pencil icon. To remove	Henry O'Malley[Spouse] × 50	ā
	a beneficiary, click on		_
	the trash can icon.		

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			