



ADD/CHANGE BENEFICIARY JOB AID

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BENEFICIARY CHANGE

Follow these steps to change your beneficiary.

1. Click **View All Apps** on your Workday home page, then select the **My Benefits** app.
2. Click **Change Benefits/Beneficiaries/Dependents** in the **Enroll/Change** column to change your benefit elections.



3. Select the Beneficiary Change **Change Reason** from the drop-down menu, then enter the **Benefit Event Date**.
4. Click **Submit**.

Change Benefits Jonnie Smith

Change Reason * Beneficiary Change

Benefit Event Date * 06/01/2023

Submit Elections By 06/01/2023

Benefits Offered: Basic AD&D, Basic Life, Voluntary AD&D, Voluntary Life

Attachments: Drop files here or Select files

Submit Save for Later Cancel

Instructions

Making Changes During the Year

Unless making changes to your H.S.A. Contributions and Voluntary Life Elections and Beneficiaries, once you've made your elections for the plan year, you cannot make any changes until the next Open Enrollment. The only exception to this IRS regulation is if you experience a Qualified Change in Status, or a Qualifying Life Event. Depending on the Qualifying Life Event you'll be able to make certain changes to your elections outside of the Open Enrollment period.

Examples of a Qualifying Life Event include:

- Marriage, legal separation, or divorce
- Birth or adoption of a child
- Change in employment status for you or your spouse that results in gaining or losing coverage
- Change in a dependent's benefits eligibility status (e.g., a dependent child exceeds the maximum age for coverage)
- Loss of a dependent (death)

Note: If you miss the 30-day window, you may not change your benefits until the next Open Enrollment.

Next Steps

Once you've submitted this change request with supporting documentation you will receive a To-Do action item in your inbox with next steps pertaining to your specific change reason.

Questions

If you have questions about your benefits or the enrollment process, contact the ABD Benefits Help Desk (Monday-Friday, 8 a.m. - 5 p.m.) by calling 866-271-8123 or emailing ExelixisBenefits@abdanswers.com. You can also submit your benefit-related questions by logging a ticket

Note: If you have questions on your benefits or the enrollment process, contact the Benefits Team at benefitshelpdesk@exelixis.com. You can also submit your benefit related questions by logging a ticket through JSM.

5. Click **Open**.

You have submitted

Up Next: Jonnie Smith | Change Benefit Elections

[View Details](#)

Open

6. Click **Let's get Started**.

Change Benefit Elections

Initiated On 05/31/2023

Submit Elections By 06/30/2023

Let's Get Started

7. The benefits that allow beneficiaries will display. Click **Manage** to update your beneficiaries to any of the plans shown. Basic Life was chosen first for this guide.

Insurance

Basic Life
Prudential (Employee)

Cost per paycheck Included

Coverage 2 X Salary

Manage

Basic AD&D
Prudential (Employee)

Cost per paycheck Included

Coverage 2 X Salary

Manage

Voluntary Life
Waived

Enroll

Voluntary AD&D
Waived

Enroll

9. Click **Confirm and Continue**.

Basic Life

Projected Total Cost Per Paycheck
\$0.00

Plans Available

1 Item

*Selection	Benefit Plan Details	You Pay (Biweekly)	Company Contribution (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Prudential (Employee)	Included	

Confirm and Continue **Cancel**

10. Click the **Add(+)** icon to add a **Primary** or **Secondary Beneficiary**. If you are adding an existing beneficiary Click the **field** and select **Existing Beneficiary Persons**.

- **Note:** You must have a Primary beneficiary before you can add a Secondary beneficiary. The same person cannot be both a Primary and Secondary beneficiary.

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

11. The **Percentage** must equal **100%**. You may have multiple primary beneficiaries, but the total percentage must equal 100% (e.g., Beneficiary A = 75% and Beneficiary B = 25%). No matter how many beneficiaries you add, ensure the **Primary Percentage** always adds up to **100%**. If you have added a **Secondary Beneficiary** that total must also equal **100%**.
12. Click **Save** once you have selected/added all beneficiaries.

SUBMIT BENEFICIARY CHANGE

1. Click **Review and Sign** when you are ready to submit your changes.

Beneficiary Change

Projected Total Cost Per Paycheck
\$0.00

▼ Enrollment Instructions

Here is a [link](#) to our HIPAA Notice of Privacy Practices for Self-Funded Benefit Plans

Insurance

REVIEWED

Basic Life
Prudential (Employee)

Cost per paycheck Included
Coverage 2 X Salary

Manage

UPDATED

Basic AD&D
Prudential (Employee)

Cost per paycheck Included
Coverage 2 X Salary

Manage

Voluntary Life
Waived

Enroll

Voluntary AD&D
Waived

Enroll

Review and Sign Save for Later

2. Review the Summary of your elections.

View Summary

Projected Total Cost Per Paycheck
\$0.00

Carefully review your benefit elections below. As a reminder, unless you're making changes to your H.S.A Contributions or Voluntary Life Elections and Beneficiaries, you cannot make any changes until the next Open Enrollment, or you experience a Qualified Change in Status or Qualifying Life Event.

Once you've reviewed and determined you're ready to submit, scroll down to the bottom of the page, attach any required documents or files, and accept the Legal Notice for Electronic Signature.

If you notice something you'd like to change or want to come back to your enrollments later, you can select Cancel or Save for Later.

Selected Benefits 2 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Basic Life Prudential (Employee)	05/18/2023	05/18/2023	2 X Salary		Marie Smith	\$0.00
Basic AD&D Prudential (Employee)	05/18/2023	05/18/2023	2 X Salary		Marie Smith	\$0.00

Waived Benefits 2 items

3. Scroll to the bottom of the page and click the **I Agree** box to provide your **Electronic Signature**, then click **Submit**.
4. Click **View Benefits Statement** to download and print a copy of your benefit elections or click **Done**. Your elections route to the Benefits Partner for approval.

Electronic Signature

Legal Notice: Please Read

Your name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I Agree" checkbox, you are certifying that:

- You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from your earnings the amount of your premiums or other contributions (if any) for the benefit options elected above.
- You understand and acknowledge that under the Internal Revenue Code regulations rules, you may not change your benefit elections during the year unless you experience a qualified change in status.
- You understand that you will not pay income tax or FICA tax on my medical, dental, vision, and Flexible Spending Account contributions. They are paid through the Flexible Benefits Plan on a pre-tax basis.
- Company-provided life insurance that exceeds \$50,000 may be subject to imputed income.
- Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you have had a qualified status event during the calendar year.
- If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance coverage you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment within 31 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse, or your dependents, provided you request enrollment within 31 days after the marriage, birth or adoption.

I Accept

Submit Save for Later Cancel

Submitted

You've submitted your elections.

Congratulations! Your benefit elections have been submitted and are now waiting for approval. Once approved by HR your elections will be sent to each of our providers on our next scheduled file feed and their systems will update within 72 hours of receiving the file.

Remember, except for H.S.A., your benefits will retro back to your start date. Any expenses incurred between your start date and the time your coverage is active with our providers can be submitted for reimbursement.

If you have any concerns or questions you can reach out to benefits@exelixis.com or submit a ticket in [Footprints](#).

View 2023 Benefits Statement

Done

EDIT EXISTING BENEFICIARIES

Follow these steps to edit your existing beneficiary.

1. Click **View All Apps** on your Workday home page, then select the **My Benefits** app.
2. Click **Edit Existing Beneficiaries Information** in the **Enroll/Change** column to change your benefit elections.



3. Click **Edit** to update the desired beneficiary.

Beneficiaries Jonnie Smith ⋮

Beneficiaries 2 items ⌵

Beneficiary	Relationship	Benefit Elections	
Marie Smith	Spouse		<input type="button" value="Edit"/>

5. Enter updates and click **Submit**.

Edit My Beneficiary Jonnie Smith ⋮

Beneficiary Personal Information

Legal Name
Legal Name *
Marie Smith

Relationship
Relationship *
Spouse

Date of Birth
Date of Birth
01/01/1985
Age
38 years, 4 months, 30 days

Date of Death
Date of Death
(month)