EXELIXIS®

ADD/CHANGE BENEFICIARY
JOB AID

CONTENTS

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**.

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.
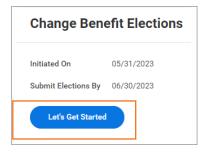
5. Click **Open**.

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)
○ Select ○ 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.

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.

Note: In step 10, you may select **Add New Beneficiary or Trust** to enter the information of a person who is not a dependent.

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

2. Review the Summary of your elections.

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.
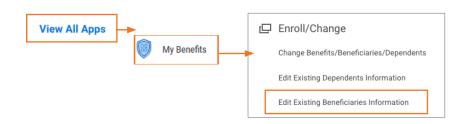
Follow these steps to edit your existing beneficiary.

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.

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