

## Beneficiary Designation Training Guide

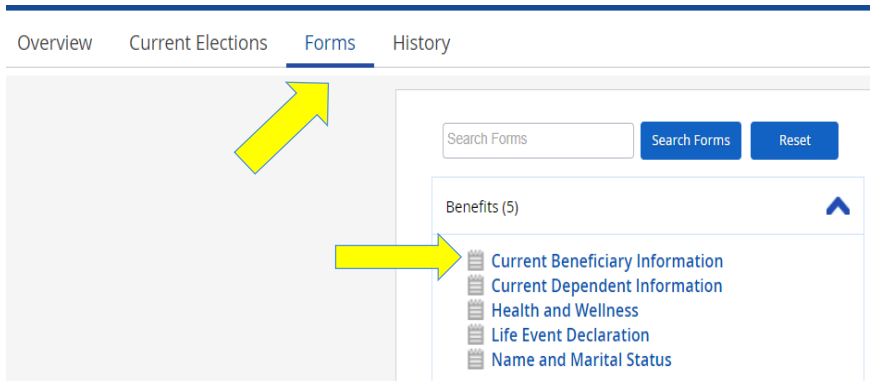
### 1. On your Dayforce Dashboard, go to Benefits

Benefits should be on your Home Screen. If not, look under the Main Menu (3 lines, top left).



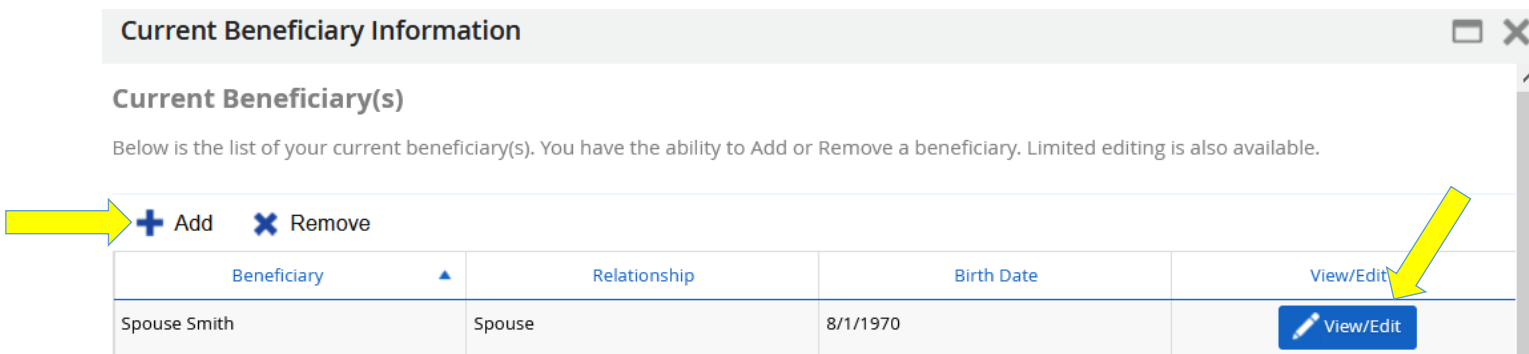
### 2. Complete Beneficiary Information Form

- Click on the "Forms" tab.
- Click on "Current Beneficiary Information".



### 3. Step 1 - Add Beneficiary(s)

- Click on "Add" (Or click on "View/Edit" to make changes to current beneficiaries).



- Complete all required fields with a red asterisk (Enter address only if different from employee) and click "Continue"

## Add New Beneficiary



### Personal Information

\* Required Field

First Name\*

Middle Name

Last Name\*

Gender

Relationship\*

Birth Date

SSN/SIN

### Primary Address

+ Add

No Primary Address

### Other Address

+ Add

### Phone Number

+ Add

Currently does not have a phone number.

Continue

Cancel

## 4. Step 2 - Add Designation

- Click on "Add Designation" to add the beneficiaries from above to the Plan. You may also "Remove Designation" if you would like to remove beneficiaries from the Plan.

### Current Designation

Below are the benefit options in which you can choose to designate a beneficiary. If you want to add a new beneficiary designation, select "Add Designation" and select the beneficiary you would like to designate a percentage. You must designate at least one Primary beneficiary. You may designate any percentage amount greater than 0.00% to each beneficiary, as long as the total for each beneficiary type equals 100%.

### LI & Participating Employers - UNUM - Life Insurance

Coverage Date 11/1/2020 Effective Date 11/1/2020 Coverage Amount \$63,000.00

Add Designation Remove Designation

Beneficiary	Relationship	Birth Date	Type	Percentage
Spouse Smith	Spouse	8/1/1970	Primary	100.00

- Select the name of the beneficiary

### LI & Participating Employers - UNUM - Life Insurance

Coverage Date 11/1/2020 Effective Date

Add Designation Remove Designation

Available Beneficiaries:

+ Child Smith Child

#### Add a new beneficiary

To add a new beneficiary not listed, first add them to the Current Beneficiaries at the top of the page.

- Under "Type" select "Primary" or "Contingent"

Type
Primary
<input type="text"/>
Primary
Contingent
Primary

Choose One

- Under “Percentage” select the amount to designate
  - Note: If more than one beneficiary, totals must equal 100% for Primary and Contingent Types.

Percentage
100

- Add Designations to all Plans, then click “Submit”