

**Overview:** This document explains how employees can elect to add their stipend to their retirement.

The recommended browser for accessing Workday is Google Chrome, Mozilla Firefox, and Apple Safari may also be used.

For assistance or training using these procedures, call 419-434-6964 or e-mail [hr@findlay.edu](mailto:hr@findlay.edu).

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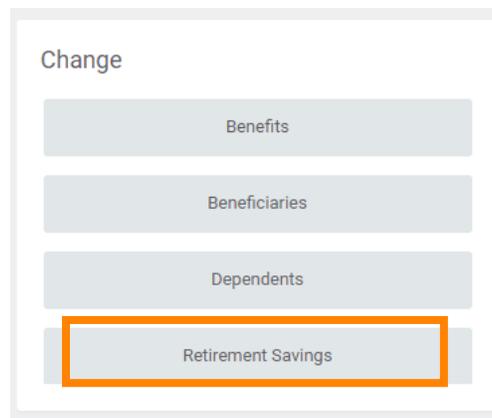
**Add Stipend to Retirement Contribution**

**Return Retirement Contribution to Previous Election**

### Add Stipend to Retirement Contribution

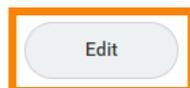


1. Start from the **Benefits** application .
2. Click **Retirement Savings**.



3. Click **Edit**.

#### Retirement Savings Elections



4. Confirm the **Event Date** is correct.

**NOTE:** This defaults to the current date. In order for the stipend to be added to Retirement Contribution for the November 12<sup>th</sup> pay, this change must take effect between November 1<sup>st</sup> – 5<sup>th</sup>.

## Change Retirement Savings

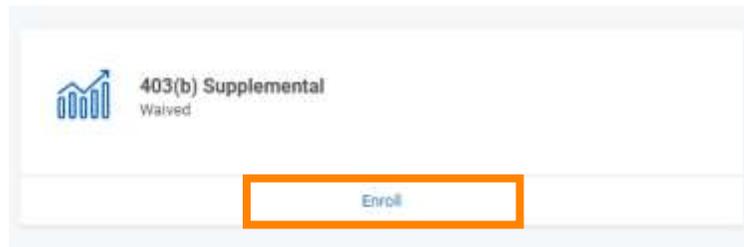
Benefit Event Date

11/01/2021



5. Click **Continue** to confirm Benefit Event Date.
6. Click **Continue**.
7. Click **Enroll** under the **403(b) Supplemental** plan.

**NOTE:** If you are already contributing to the supplemental plan, click **Manage** under the **403(b) Supplemental** plan.



8. Select the **TIAA Pre-Tax** or **TIAA Roth** Benefit Plan.

**NOTE:** If you are already contributing to the supplemental plan, and plan you want to update is “Selected,” you can move to Step 9.

**Plans Available**

Select a plan or Waive to opt out of 403(b) Supplemental

2 items

*Selector	Benefit Plan	You Contribute (Bi-weekly)	Company Contribution (Bi-weekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	TIAA Pre-Tax		
<input type="radio"/> Select <input checked="" type="radio"/> Waive	TIAA Roth		

9. Click **Confirm and Continue**.

10. Select the Contribution Type, **Amount** OR **Percentage**.

**Contribute**

Enter how much you want to contribute as an amount or a percentage.

Contribution Type \* select one

**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.

Primary Beneficiaries: 0 items ⌵ ⌶ ⌵

⊖	Beneficiary	Percentage
No Data		

Secondary Beneficiaries: 0 items ⌵ ⌶ ⌵

⊕	Beneficiary	Percentage
No Data		

11. Enter the **Amount** or **Percentage** for the contribution.

**NOTE:** The Amount or Percentage you select is per paycheck Contribution.

**Contribute**

Enter how much you want to contribute as an amount or a percentage.

Contribution Type \* Amount

Per Paycheck Contribution (\$) 1,000.00

Maximum Amount: \$340.15

**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.

Primary Beneficiaries: 0 items ⌵ ⌶ ⌵

⊖	Beneficiary	Percentage
No Data		

Secondary Beneficiaries: 0 items ⌵ ⌶ ⌵

⊕	Beneficiary	Percentage
No Data		

12. Click **Save**.

13. Once complete, click **Reivew**.

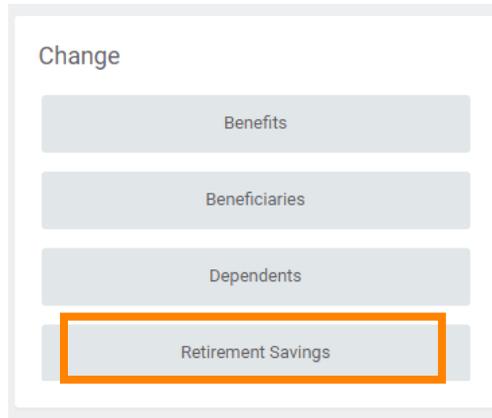
14. Click **Submit**.

15. Click **Done**.

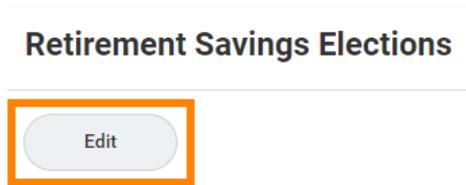
### Return Retirement Contribution to Previous Election



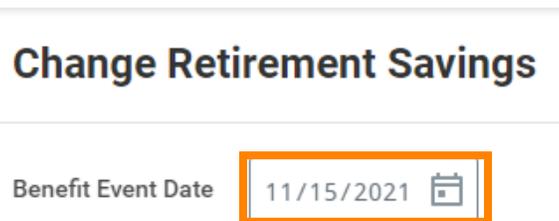
1. Start from the **Benefits** application .
2. Click **Retirement Savings**.



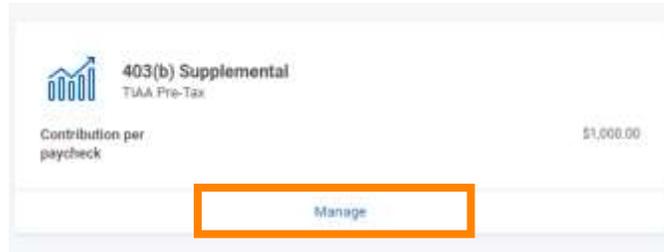
3. Click **Edit**.



4. Confirm the **Event Date** is correct.  
**NOTE:** This defaults to the current date. In order for the stipend amount to be removed from the Retirement Contribution for the November 26<sup>th</sup> pay, this change must take effect between November 15<sup>th</sup> – 19<sup>th</sup>.



5. Click **Continue** to confirm Benefit Event Date.
6. Click **Continue**.
7. Click **Manage** under the **403(b) Supplemental** plan.



403(b) Supplemental  
TIAA Pre-Tax

Contribution per paycheck: \$1,000.00

Manage

8. **Select** or **Waive** the **TIAA Pre-Tax** or **TIAA Roth** Benefit Plan.  
**NOTE:** If you would like to continue to contribute to the supplemental plan, keep the option as **Select**. If you would like to remove the full contribution, click **Waive**.

**Plans Available**

Select a plan or waive to opt out of 403(b) Supplemental

2 items

*Selection	Benefit Plan	You Contribute (Bi-weekly)	Company Contribution (Bi-weekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	TIAA Pre-Tax		
<input type="radio"/> Select <input checked="" type="radio"/> Waive	TIAA Roth		

9. Click **Confirm and Continue**.  
**NOTE:** If you chose to **Waive** the supplemental contribution, you can move to Step 13.
10. Enter the **Amount** or **Percentage** for the updated contribution.  
**NOTE:** The Amount or Percentage you select is per paycheck Contribution.

**Contribute**

Enter how much you want to contribute as an amount or a percentage

Contribution Type:

Per Paycheck Contribution (\$):

Maximum Amount: \$2,848.18

**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

Primary Beneficiaries: 0 items

Beneficiary	Percentage
No Data	

Secondary Beneficiaries: 0 items

Beneficiary	Percentage
No Data	

11. Click **Save**.
12. Once complete, click **Reivew**.
13. Click **Submit**.
14. Click **Done**.