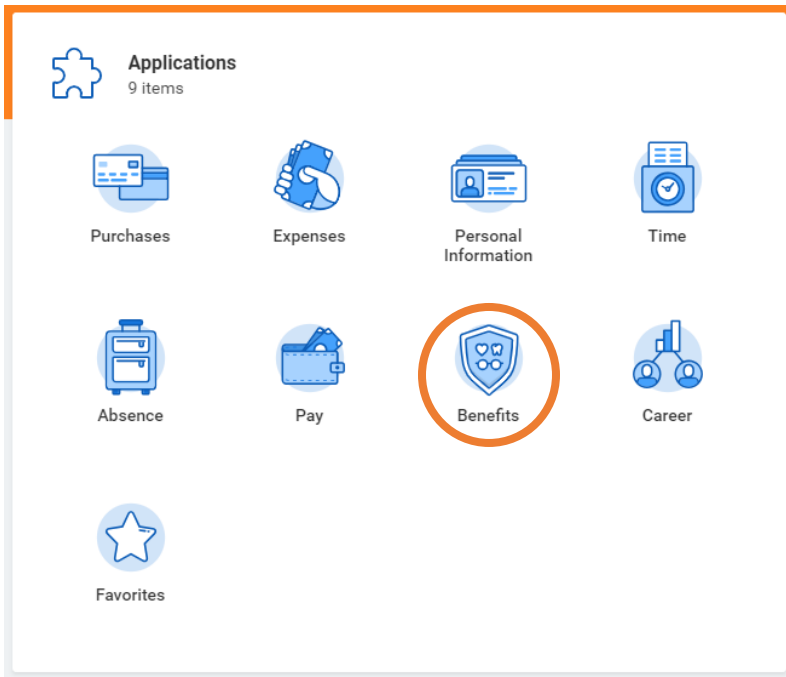


Instructions on How to Opt-In to the University’s Retirement Plan

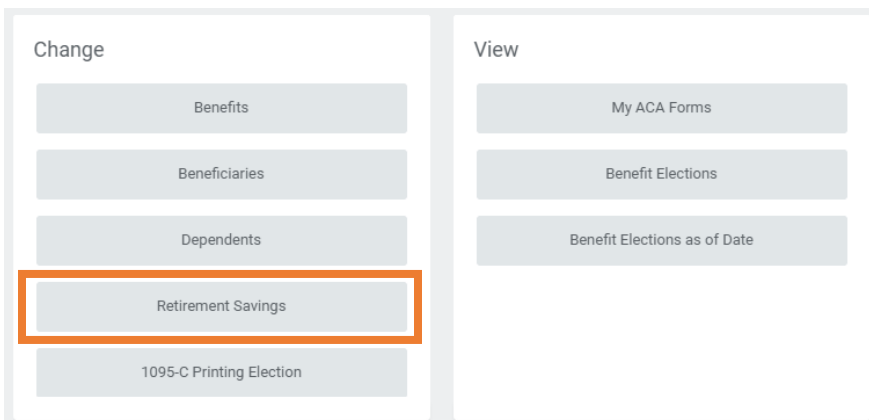
Using Workday to Opt-In to the University’s Retirement Plan is simple and will only take a few minutes to complete. Please follow the steps below to enroll in the University’s retirement plan.

Step 1: Sign into Workday

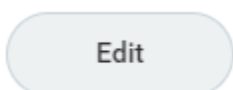
Step 2: Select the “Benefits” worklet on your main Workday screen




Step 3: Select “Retirement Savings” under the “Change” column.



Step 4: Select “Edit”



Step 5: Verify Event Date is correct and select "OK" (defaults to current date)

Event Date 

Step 6: You will be taken to a screen where you can elect a “Benefit Plan” to contribute 1%, 2% or 3% to your retirement fund. From this screen, you can also elect if you want to contribute additional funds as a supplemental contribution. (You may need to scroll down to see all 5 items in the “Retirement Savings Elections” table).

Total Employee Contribution (Percent) 0.00% Total Employee Contribution (Amount) \$0.00 Bi-weekly Cost

Please note: 403(b) elections may be made immediately upon hire if you have already participated in a 403(b) plan at a previous employer for at least 1 year. Otherwise there is a 1 year waiting period from date of hire to be eligible to participate in the 403(b) plans.
The University of Findlay offers a Tax Deferred Annuity (TDA) option for all employees in a benefited position. Employees may enroll in the TDA plan at any time. Contributions to the TDA plan may be made either pre-tax or post-tax, however there is no employer contribution into a TDA plan.

Retirement Savings Elections 5 items

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution	Employer Contribution	Provider Website
403(b) - TIAA Years 6-11 (1%)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Minimum 1 Percentage Maximum 1	Percent 1	Retirement
403(b) - TIAA Years 6-11 (2%)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Minimum 2 Percentage Maximum 2	Percent 2	Retirement
403(b) - TIAA Years 6-11 (3%)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Minimum 3 Percentage Maximum 3	Percent 5	Retirement
403(b) Supplemental - TIAA Pre-Tax	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0 Amount (Bi-weekly) 0.00	Percentage Maximum 75 Amount Maximum (Bi-weekly) \$3,846.15		Retirement
403(b) Supplemental - TIAA Roth	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Maximum 75		Retirement

Click “Elect” for the appropriate “Benefit Plan” to contribute 1%, 2% or 3% to your retirement fund and input the corresponding “Employee Contribution.”

Retirement Savings Elections 5 items

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
403(b) - TIAA Years 6-11 (1%)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Minimum 1 Percentage Maximum 1
403(b) - TIAA Years 6-11 (2%)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent 0 <input type="text" value=""/>	Percentage Minimum 2 Percentage Maximum 2
403(b) - TIAA Years 6-11 (3%)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Minimum 3 Percentage Maximum 3

Supplemental Contributions (Pre-Tax or Post-Tax) can also be elected up to the Annual IRS Maximum*.

403(b) Supplemental - TIAA Pre-Tax	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0 Amount (Bi-weekly) 0.00
403(b) Supplemental - TIAA Roth	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0 Amount (Bi-weekly) 0.00

Once you have selected the option(s) that is best for you, click “Continue”.

Continue

Cancel

Step 7: Next you are prompted to enter beneficiary designations if not already completed. This step can be skipped if you do not have all the information needed to designate beneficiaries. Please see the “Adding Beneficiaries” user guide on the Workday Resources Worklet to enter your beneficiary designations later.

Beneficiary Designations 1 item

Benefit Plan	Provider Website	Requires Beneficiary	*Beneficiary	*Primary Percentage / Contingent Percentage
403(b) - TIAA Years 6-11 (2%)	Retirement	<input type="checkbox"/>	+	

At the bottom of page you can finalize your Retirement Elections by selecting “Submit.”

Submit

Go Back

Cancel

A Summary Page will be provided for your review:

Benefit Event Type Retirement Savings Default

Initiated On 01/03/2019

Submit Elections By 01/06/2019

Event Date 01/06/2019

Finalized Date 01/03/2019

Benefit Group 30+ Hours/Week Full Benefits

Enrollment Status Finalized

Attachments 0 items

Attachment
No Data

Elected Coverages 1 item

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Beneficiaries	Benefit Credit (Bi-weekly)
403(b) - TIAA Years 6-11 (2%)	01/06/2019	01/20/2019	2%		
Total:					

Waived Coverages 1 item

Plan Type
403(b) Supplemental

Beneficiary Designations 1 item

Benefit Plan	Provider Website	Requires Beneficiary	Beneficiary	Primary Percentage / Contingent Percentage
403(b) - TIAA Years 6-11 (2%)	Retirement	<input checked="" type="checkbox"/>		

Done

Your election has been completed.