

Retirement Plan Contribution Changes Workday Instructions

1. Select the **Benefits** worklet from the *Applications* menu



2. Select **Benefits** from the *Change* menu

Change

A vertical list of four buttons: 'Benefits', 'Beneficiaries', 'Dependents', and 'Retirement Savings'. The 'Benefits' button is highlighted with a red border.

3. Select **Retirement Plan Contribution Changes** from the drop down menu. Then select the **effective date** of the change from the calendar below the change reason

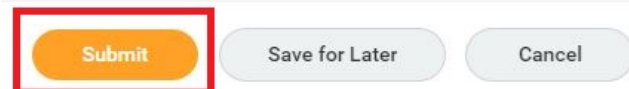
Change Reason * Retirement Plan Contribution Changes ▼

Benefit Event Date * 02/07/2022 

Submit Elections By 03/08/2022

Benefits Offered 403(b)

4. Then click **Submit** at the bottom of the page

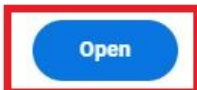
Three buttons: 'Submit' (highlighted with a red border), 'Save for Later', and 'Cancel'.

5. Click **Open** on the next page

You have submitted

Up Next: Change Benefit Elections

[View Details](#)

A blue button with the text 'Open' inside, highlighted with a red border.

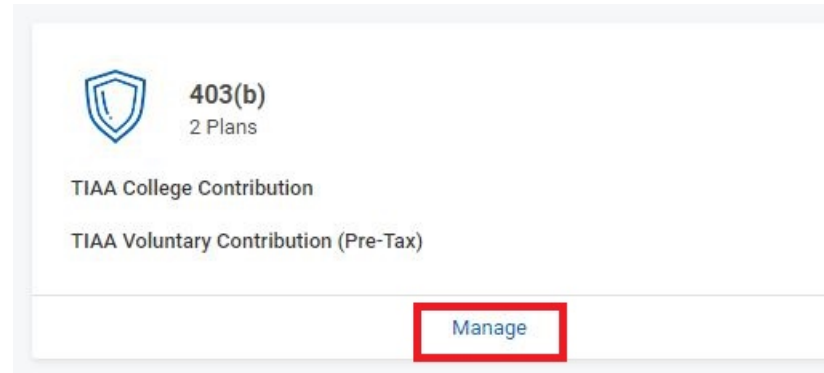
6. Then click on **Let's Get Started**

Initiated On 02/07/2022

Submit Elections By 03/08/2022



7. Select **Manage** on the next page



8. Review the Plans available. Here you will need to select or waive your contribution options (Pre-Tax, Roth Post-Tax)

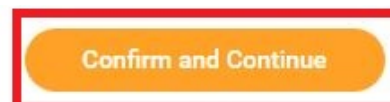
Plans Available

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

3 items ☰ ☐ ↻

*Selection	Benefit Plan	You Contribute (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	TIAA College Contribution	\$0.00	
<input checked="" type="radio"/> Select <input type="radio"/> Waive	TIAA Voluntary Contribution (Pre-Tax)	2%	
<input type="radio"/> Select <input checked="" type="radio"/> Waive	TIAA Voluntary ROTH Contribution (Post-Tax)		

9. Click **Confirm and Continue**, and then **Save** on the bottom of the next page.



10. On the next page, enter the amount you want to contribute as a percentage. Then click **Save** at the bottom of the page.

Contribute

Enter how much you want to contribute as a percentage.

Contribution Type Percentage

Contribution (%)

2

Minimum Percentage: 1

Maximum Percentage: 100

11. Click **Review and Sign** on the next page.

Review and Sign

Save for Later

12. Review your changes and confirm they are correct. Then scroll down to the bottom of the page, check the box next to **I Accept** and press **Submit**.

I Accept



enter your comment

Process History



Change Benefits for Life Event- Awaiting Action

Submit

Save for Later

Cancel