

RETIREMENT ENROLLMENT 201

A GUIDE TO ENROLLING IN RETIREMENT IN WORKDAY

WHAT DO I NEED TO DO?

The steps below will help to ensure you have all the information you need to enroll in your retirement plan.

1

IN WORKDAY, FIND THE SEARCH BAR, ENTER CHANGE BENEFITS.

Enter "Change Benefits" into the search bar, be careful of spelling! You will see a task appear. Select Change Benefits - Task.

2

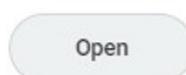
SELECT THE FOLLOWING OPTIONS, THEN SUBMIT.

- **Change Reason:** Select "Retirement Plan Election (UW 2021)"
- **Effective Date:** Enter "01/01/2021". **Do not** enter any other date, or your election will be declined.

3

SELECT THE GREY "OPEN" BUTTON.

Do not select the Done button! If you accidentally selected it, you can find the rest of the task in your Workday inbox.



4

ORIENT YOURSELF TO THE SCREEN.

At the top of the screen are a set of instructions to help you differentiate between your plan options.

In the table labeled "Retirement Savings Elections" you will see a list of plans that you are eligible for. This list is customized to you, and will look different for each employee. This is where you will make your election.

5

MAKE YOUR SELECTION.

Once you know which retirement plan you wish to elect, follow these steps:

1. In the Benefit Plan column, scroll to find the one you are electing.
2. In the Elect/Waive column, select Elect next to the plan you want*.
3. Select the Continue button. No attachments or comments are necessary.

*If you are electing PERS 3 or TRS 3, you will need to select a rate choice in the menu that appears under the "Coverage" column next to your plan. Then select Continue. You will also select an Investment Program on the next screen.



READ AND CHECK THE "I AGREE" BOX ON THE LEGAL NOTICE.



CLICK SUBMIT!

Please note: Your election to enroll in retirement benefits early in order to have a 01/01/2021 effective date is due by 7p PST on November 25th. If you do not submit by the deadline, you will still have an opportunity to enroll during your regular new hire window.