

Before getting started, choose which scenario best fits you.

To view current benefits, and see which option below applies to you, go to the Benefits application, and click on the Retirement Savings button to view all current Retirement benefit enrollments.



If after you reviewed this job aid, you still have questions, contact:

UVA HR at AskHR@virginia.edu

UPG HR at RBenefits@hscmail.mcc.virginia.edu

Tasks

- [Which Scenario Best Fits?](#)
- [Change Retirement Benefits](#)

Which Scenario Best Fits?



If you are participating in any of these UVA or VRS retirement plans: ORP, MCRP, VRS/VALORS Plans 1 or 2, or Community Medicine, you may also enroll in a UVA 403(b) retirement savings plan in Workday. Housestaff, temps, and wage employees may also enroll in a 403(b)-retirement savings plan. To newly elect, change, or stop a UVA 403(b) retirement savings plan, go to the [next page](#).



If you are participating in the VRS Hybrid Retirement Plan, you should first maximize the VRS Hybrid Voluntary Plan at 4% in order to get the VRS Hybrid Cash Match before you enroll in the UVA 403(b) Plan. VRS Hybrid Voluntary investment elections are made with the vendor and not in Workday To enroll or request changes in the VRS Hybrid Voluntary benefit, visit the state's [VRS Hybrid Plan](#) website. If you are already enrolled in the VRS Hybrid Voluntary Plan at the maximum 4%, then you may also enroll in a UVA 403(b) retirement savings plan in Workday by following the instructions in this job aid.



UPG Staff and Advance Practice Providers are auto-enrolled in the retirement savings 401(k) plan with TIAA, with an employee contribution and employer match within 30-days of hire. All 401(k) investment elections, and beneficiaries are made with the vendor and not in Workday. Please visit [TIAA](#) to request changes.

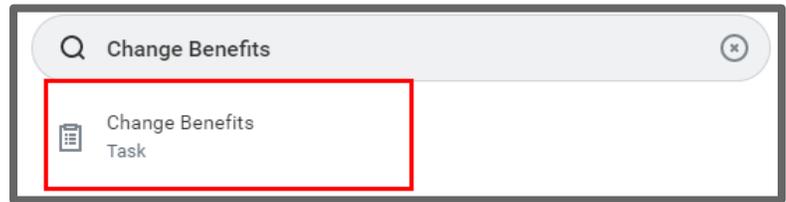
All UPG employees have an opportunity for retirement savings with the UPG 403(b) Plan, either with TIAA or Fidelity. If after you reviewed this job aid and the content within the tile change request in Workday, you still have questions, contact your UPG Benefits Specialist at rbenefits@hscmail.mcc.virginia.edu.



UVA employees are also eligible for retirement savings in the Commonwealth of Virginia's 457 Deferred Compensation plan. All 457 investment elections are made with the vendor and not in Workday. Please visit the 457 Deferred Compensation website, <http://www.varetirement.org/dcp.html>, to enroll or request changes.

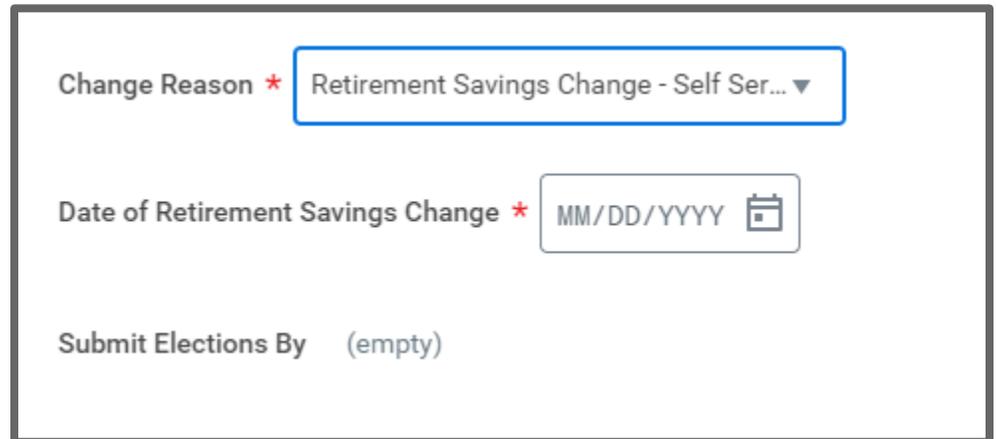
Change Retirement Benefits

1. From the Workday search feature, enter 'Change Benefits' and select the **Change Benefits** tasks.



A search bar with the text 'Change Benefits' and a magnifying glass icon on the left and a close icon on the right. Below the search bar, a red box highlights a search result: 'Change Benefits Task' with a document icon.

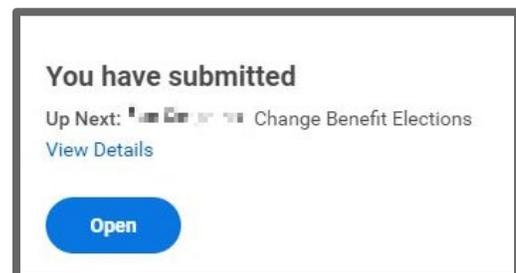
2. Click the **Change Reason** drop-down to select **Retirement Savings Change – Self Service**.
3. In the **Date of Retirement Savings Change** field, enter today's date or a date in the future.



The form contains three fields: 'Change Reason *' with a dropdown menu showing 'Retirement Savings Change - Self Ser...'; 'Date of Retirement Savings Change *' with a date input field showing 'MM/DD/YYYY' and a calendar icon; and 'Submit Elections By' with '(empty)' next to it.

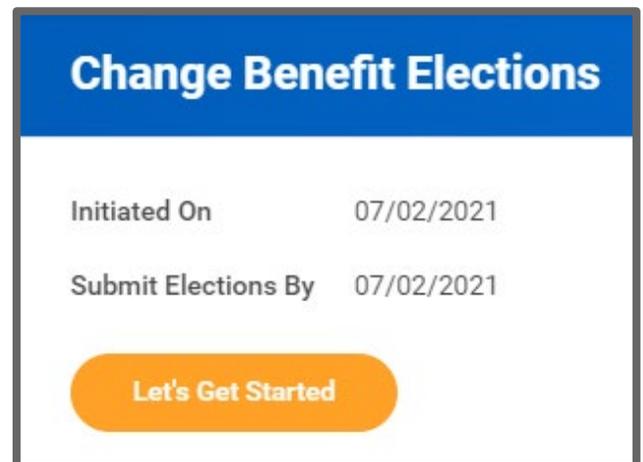
Click **Submit**. You will see a 'You have submitted' confirmation with an Open link. **Click the Open link to move forward.**

If you click out of the submit confirmation, you can pick up where you left off by accessing the benefit change from your Workday Inbox.



The confirmation message says 'You have submitted'. Below it, it says 'Up Next: Change Benefit Elections' with a 'View Details' link. At the bottom is a blue 'Open' button.

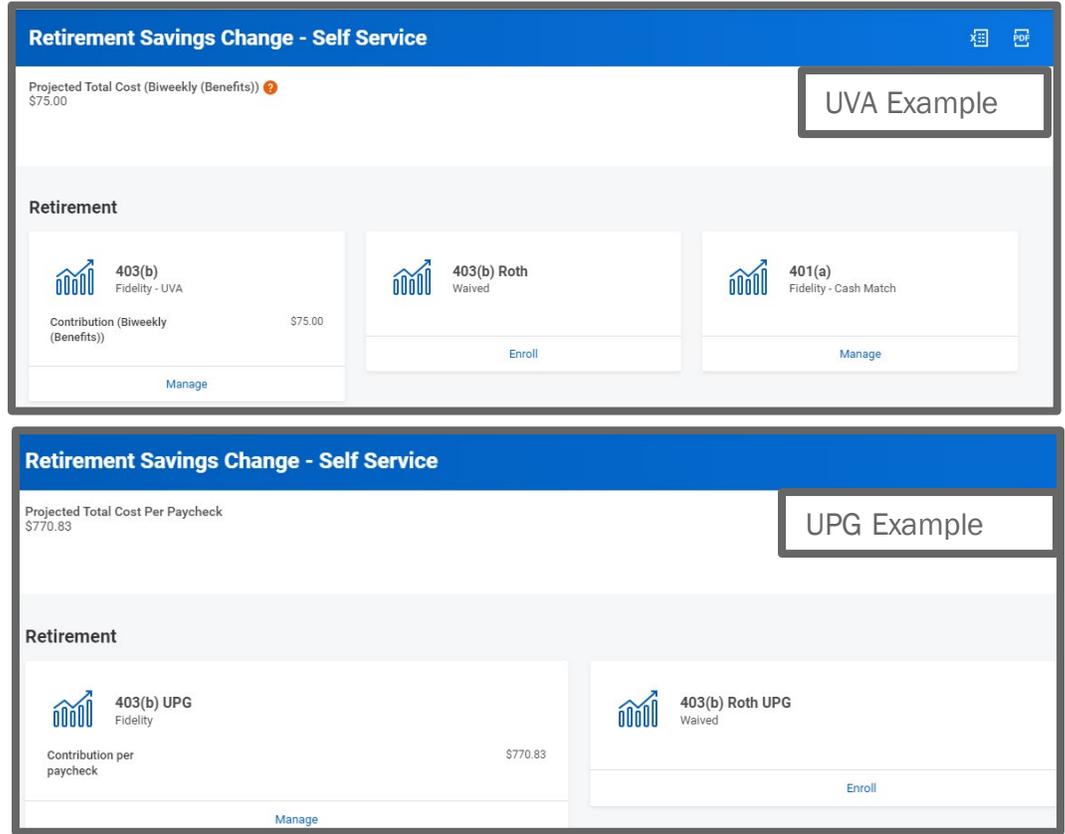
4. Click the **Let's Get Started** button.



The card has a blue header 'Change Benefit Elections'. Below it, it shows 'Initiated On 07/02/2021' and 'Submit Elections By 07/02/2021'. At the bottom is an orange 'Let's Get Started' button.

5. Your choices for Retirement Savings will display. Click on the tile for the plan you'd like to enroll, edit, or waive. If you're already enrolled in a plan, the button at the bottom of the tile will display as Manage. Otherwise, the button will display as Enroll. Click each tile you'd like to enroll, edit, or waive.

Note: The screenshots to the right are examples. Your personal tiles benefits display will vary based on your retirement benefits eligibility.



Retirement Savings Change - Self Service

Projected Total Cost (Biweekly (Benefits)) \$75.00

UVA Example

Retirement

Plan Name	Provider	Contribution (Biweekly (Benefits))	Status	Action
403(b)	Fidelity - UVA	\$75.00	Active	Manage
403(b) Roth	Waived		Waived	Enroll
401(a)	Fidelity - Cash Match		Active	Manage

Retirement Savings Change - Self Service

Projected Total Cost Per Paycheck \$770.83

UPG Example

Retirement

Plan Name	Provider	Contribution per paycheck	Status	Action
403(b) UPG	Fidelity	\$770.83	Active	Manage
403(b) Roth UPG	Waived		Waived	Enroll

- 6. On the **Plans Available** page, you will see a list of your current of available plan(s) and vendor(s). Click the **Confirm and Continue** button to go to the Contribute page.

Projected Total Cost Per Paycheck
\$770.83

Plans Available

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

2 items

*Selection	Benefit Plan	You Contribute (Biweekly)	Company Contribution (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Fidelity	\$770.83	
<input type="radio"/> Select <input checked="" type="radio"/> Waive	TIAA		

- 7. On the **Contribute** page, in the Contribution Type drop-down you have the option to enter a per paycheck amount or a percentage.
- 8. If you select percentage, enter the contribution percent in the **Contribution (%)** field.

Contribute

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

Contribution Type * Percentage

Contribution (%) 4

- 9. If you select amount, enter a per paycheck amount in the **Per Paycheck Contribution (\$)** field.

Contribute

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

Contribution Type * Amount

Per Paycheck Contribution (\$) 40.00

- 10. Click **Save**.

- 11. You will receive a save confirmation.

Your 403(b) changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

- 12. Click Enroll or Manage on each of your benefit tiles to submit additional changes to your other retirement savings benefits. Once done making all changes, go to step 13.

13. When you have made all your changes, click the **Review and Sign** button.

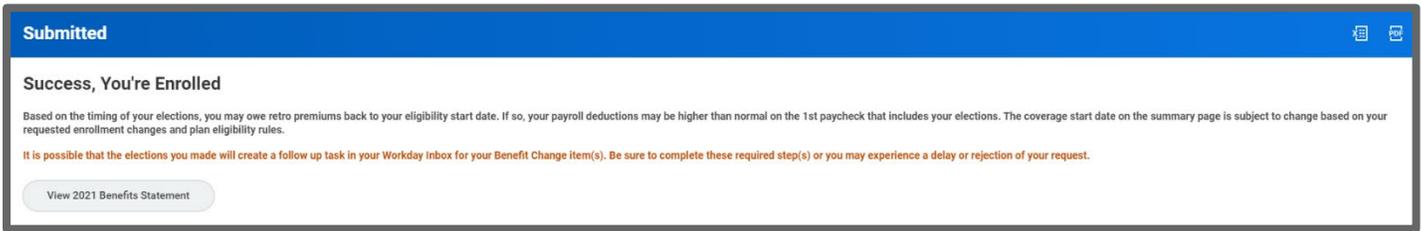
If you have more benefit changes to add, click the **Home** button to add additional changes.

14. After clicking the **Review and Sign** button, scroll through the **View Summary** of your proposed change.

15. If you are happy with the change, scroll down to the **Electronic Signature** section and click the '**I Accept**' checkbox.

16. Click **Submit**.

17. You will receive a 'Success! You've Enrolled' confirmation with a link to a **View 2021 Benefits Statement**, which shows this change only



Note: This button gives you the option to print your change request.

18. Click the **View 2021 Benefits Statement** button.

19. Click the **Print** button.

20. Click the **Download** button.

21. Your document displays, which allows you to **Open** and **Print**.

22. Click the **Home** button.

