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](http://www.varetirement.org/dcp.html), to enroll or request changes.
1. From the Workday search feature, enter ‘Change Benefits’ and select the Change Benefits tasks.

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.

4. Click the Let’s Get Started button.

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

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.

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

10. Click **Save**.

11. You will receive a save confirmation.

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.