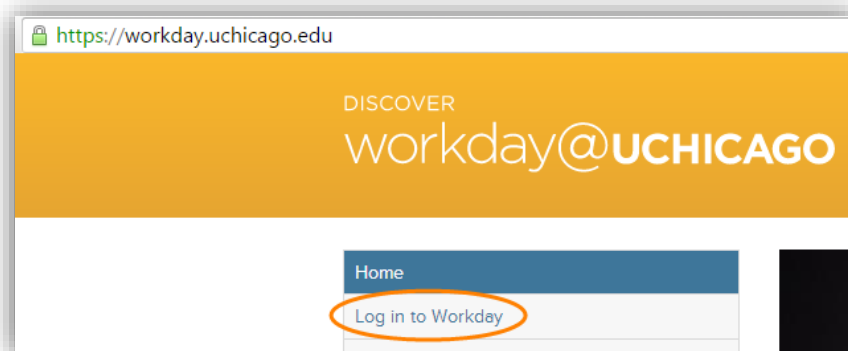


Quick Reference Guide: *Electing or Changing Retirement Elections for ERIP-Voluntary, SRP or SRP Catch-Up*

Below are instructions to elect or change elections for the Employee Retirement Income Plan – Voluntary (ERIP – Voluntary), Supplementary Retirement Plan (SRP) and Supplementary Retirement Plan Catch-Up (SRP Catch-Up).

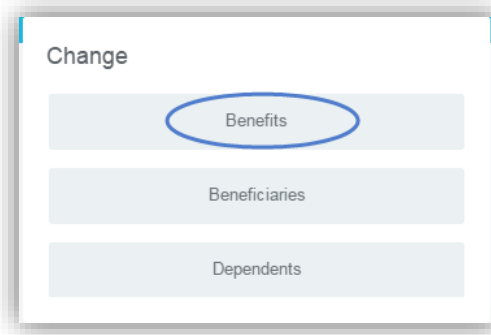
Please log into Workday at <https://workday.uchicago.edu/> and locate the “Log in to Workday” link in the upper left side of the screen and follow the steps below.



1. From the Home page, click the **Benefits** worklet.



2. Under the Change header, select **Benefits**.



Quick Reference Guide:

Electing or Changing Retirement Elections for ERIP-Voluntary, SRP or SRP Catch-Up

- Under **Benefit Event Type**, select **Retirement Plan Changes**. Use the **Calendar icon** to select today's date as the **Benefit Event Date**.

Change Benefits Logan McNeil

Benefit Event Type

- Retirement Plan Changes
- Beneficiary Change
- Birth/Adoption
- Gain of Other Coverage
- Life Insurance/LTD/PAI Change
- Loss of Other Coverage
- Marriage/Domestic Partnership/Civil Union Partnership

Benefit Event Date

MM / DD / YYYY

Submit Elections By (empty)

Enrollment Offering Types (empty)



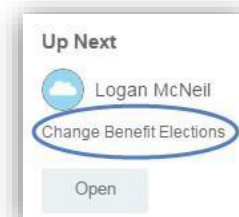
When making **Employee Retirement Income Plan – Voluntary (ERIP – Voluntary)** elections, please remember that your new election will be effective in your **next available paycheck**.



When making **Supplementary Retirement Program (SRP) or Supplementary Retirement Program (SRP Catch-Up)** elections, please remember that your new election will be effective the **first day of the following month**.

- Click on the **Submit Icon**  to submit this task.

- You will see the next task to complete. Click on the **Open Icon**  to proceed to the next step.



Electing or Changing Retirement Elections for ERIP-Voluntary, SRP or SRP Catch-Up

6. Scroll down to the Benefit Plan: **Employee Retirement Income Plan – Voluntary - TIAA**.
7. To contribute, enter 1% or 2% in the **Employee Contribution – Percent** field.

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
Employee Retirement Income Plan - Voluntary - TIAA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="0"/>	Percentage Minimum 1 Percentage Maximum 2



Voluntary ERIP elections, are in addition to the **Mandatory ERIP** plan.

- If you elect 1%, the University will contribute 2%.
- If you elect 2%, the University will contribute 4%.

8. Scroll down to the Benefit Plan: **Supplemental Retirement Plan - TIAA**
9. To contribute, enter a percentage amount in the **Employee Contribution – Percent** or enter a dollar amount in the **Employee Contribution – Amount (Monthly)** field as shown below. Bi-Weekly paid employees, please ignore the monthly indicator. The amount you enter will be deducted from each pay period.

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
Supplemental Retirement Plan - TIAA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="0"/> Amount (Monthly) <input type="text" value="0.00"/>	Percentage Maximum 100 Amount Maximum (Monthly) \$18,000.00



The 2018 annual maximum contribution set by the IRS is \$18,500. This amount includes the **Supplementary Retirement Program (SRP)** and the Employee contribution for **Voluntary ERIP**.

Electing or Changing Retirement Elections for ERIP-Voluntary, SRP or SRP Catch-Up

10. Employees age 50 and older are eligible for the **Supplemental Retirement Plan - Catch-Up TIAA** and can contribute up to an additional \$6,000 towards their retirement.
11. To contribute, enter a percentage amount in the **Employee Contribution – Percent** or enter a dollar amount in the **Employee Contribution – Amount (Monthly)** field as shown below. Bi-Weekly paid employees, please ignore the monthly indicator. The amount you enter will be deducted from each pay period.

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
Supplemental Retirement Plan Catch-Up - TIAA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="0"/> Amount (Monthly) <input type="text" value="0.00"/>	Percentage Maximum 100 Amount Maximum (Monthly) \$6,000.00

12. Click  to proceed to the next step.

13. Review your **Elected Coverages** and click the **I Agree** checkbox to confirm your selections.

Electronic Signature

I hereby apply for participation in the University of Chicago's benefits plan(s) for those benefits for which I am or may become eligible under the terms and conditions of said plan and any present or future amendments thereto, and subject to acceptance of my enrollment.

By selecting the I AGREE button, you certify that:

- You authorize the University of Chicago to deduct from your earnings the required contributions, if any, toward the cost of the plan(s); and
- You cannot change any of your elections for medical, dental, vision, or health and/or dependent care flexible spending accounts or health savings accounts until the next open enrollment period, unless you have a qualified life event. Proof of the life event is required and must be submitted within 31 days of the life event effective date.

I Agree

14. Click on the **Submit Icon**  to submit your changes.

15. Scroll to the bottom of the screen and click the **Print Icon**  to print a paper copy of your benefit elections for your personal records or click **Done Icon**  to exit.