

Workday Instructions for 403B Plans

You may make changes to your 403B or enroll in a new 403B plan at any time during the year. The minimum contribution per pay period is \$5.

Enroll in a New 403B Plan

1. From the Workday homepage, click on Benefits (with the heart)
2. Click on Change under Benefits
3. Select 403(B) New Enrollment from the dropdown menu
4. The effective date will be that day's date or a future date
5. In the attachment box, click the + icon, then Attach. You will need to upload proof of a new account, such as a letter from your 403B provider, an account statement, or a confirmation email.
6. Click Submit
7. Click Open on the next page
8. Find your 403B provider on the list. Click Elect, and then enter the amount you want taken out per pay period in the Employee Contribution box
9. Click Continue
10. Review changes, click I Agree checkbox, and then Submit

Once the event is submitted, the changes will come to the Benefits Department for approval, so there may be a delay before it shows on your Workday Benefits tab. Your 403b deduction will come out on the check date associated with the entered event date, provided that the approval is completed before the pay period end date. If it is not, the deduction will come out on the following check date.

Change Contributions to an Existing 403B Plan

1. From the Workday homepage, click on Benefits (with the heart)
2. Click on Change under Benefits
3. Select 403(B) Changes to Existing Contributions from the dropdown menu
4. The effective date will be that day's date or a future date
5. Click Submit
6. Click Open on the next page

7. Find your 403B provider on the list. Change the amount you want taken out per pay period from your current contribution to your new contribution in the Employee Deduction box
8. Click Continue
9. Review changes, click I Agree checkbox, and then Submit

Once the event is submitted, the changes will come to the Benefits Department for approval, so there may be a delay before it shows on your Workday Benefits tab. Your 403b deduction will come out on the check date associated with the entered event date, provided that the approval is completed before the pay period end date. If it is not, the deduction will come out on the following check date.

Cancel an Existing 403B Plan

1. From the Workday homepage, click on Benefits (with the heart)
2. Click on Change under Benefits
3. Select 403(B) Termination of Existing Contributions from the dropdown menu
4. The effective date will be that day's date or a future date
5. Click Submit
6. Click Open on the next page
7. Find your 403B provider on the list. Select Waive next to the provider
8. Click Continue
9. Review changes, click I Agree checkbox, and then Submit

Once the event is submitted, the changes will come to the Benefits Department for approval, so there may be a delay before it shows on your Workday Benefits tab. Your 403b deduction will terminate on the check date associated with the entered event date, provided that the approval is completed before the pay period end date. If it is not, the deduction will terminate on the following check date.

Important Note:

If you wish to re-start your deductions in the future, you will need to use the 403B New Enrollment event and upload proof of your account.

