

Workday Instructions for 403(b) Plans

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

Enroll in a New 403(b) Plan

1. From the Workday homepage, click on Benefits and Pay (under Your Top Apps)
2. Click on Change Benefits (under Tasks and Reports)
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 attachments box, click on Select files, then attach your proof. You will need to upload proof of a new account, such as a letter from your 403(b) provider, an account statement, or a confirmation email.
6. Click Submit, then click Open on the next page, then click Let's Get Started
7. Click Enroll located in the 403(b) box, click Select next to your 403 (b) vendor, then Confirm and Continue
8. Enter the contribution amount you want taken out per pay period in the Employee Contribution box and Save
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 403(b) 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 403(b) Plan

1. From the Workday homepage, click on Benefits and Pay (under Your Top Apps)
2. Click on Change Benefits (under Tasks and Reports)
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, then click Open on the next page, then click Let's Get Started
6. Click Manage, make sure that Select is selected next to your vendor, click Confirm and Continue, change the amount you want taken out per pay period to your new contribution in the Employee Deduction box and Save
7. 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 403(b) deduction will come out on the check date associated with the entered event date, provided that the approval

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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 403(b) Plan

1. From the Workday homepage, click on Benefits and Pay (under Your Top Apps)
2. Click on Change Benefits (under Tasks and Reports)
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, then click Open on the next page, then click Let's Get Started
6. Click Manage, select Waive next to your vendor, then Confirm and Continue
7. 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 403(b) 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.

Important Note:

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