

Making 403b Changes in Workday

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Election changes for the 403b retirement plan no longer require a paper form. All election changes are now made online in workday.

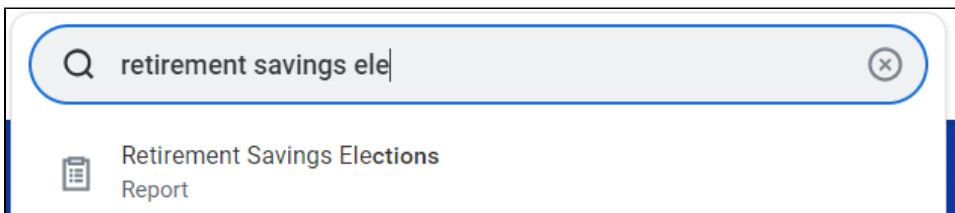
i You can change your 403b retirement plan elections at any time. **You will notice that if you are eligible for a match, the match appears on the confirmation screen as 0. The match does not show on the benefit screen because it is an automated payroll process. Your match will be displayed on your payslip.**

On this job aid:

[Election changes 403b retirement plan](#)

Election changes 403b retirement plan

1. Log into Workday
2. Search and select Retirement Savings Elections



3. Click on Edit

Retirement Savings Elections: 2 items

Benefit Plan	Employee Contribution	Beneficiaries		
		Beneficiary	Primary Percentage	Contingent Percentage
403(b) - TAA	Percent 0			
403(b) Match - TAA	Percent 0			

4. You can use the current date or set a date in the future.

Event Date

5. Click OK once you have the date you want to use. Make your choice of how you want to contribute.

Important: You must either use dollar amount or percentages.

You will also note that the matched is grayed out and you cannot make changes. The match is an automated calculation that is done and reflects Lynn's current match schedule. You will not see a match percentage on the benefits screen as it is an automated payroll process.

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
403(b) - TIAA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0 Amount (Monthly) 0.00	Percentage Minimum 1 Percentage Maximum 100 Amount Minimum (Monthly) \$0.19 Amount Maximum (Monthly) \$750.00
403(b) Roth - TIAA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent 5 Amount (Monthly) 0.00	Percentage Minimum 1 Percentage Maximum 100 Amount Minimum (Monthly) \$0.19 Amount Maximum (Monthly) \$750.00
403(b) Match - TIAA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent 5 Amount (Monthly) 0.00	Percentage Minimum 100 Amount Maximum (Monthly) \$394.02

Submit Cancel

6. Once you entered your election, click Submit. A confirmation screen will appear.

Retirement Savings Elections Confirmation

Benefit Plan: 403(b) Roth - TIAA

Coverage Begin Date: 01/01/2023

Coverage End Date: 01/01/2023

Employee Contribution: 5%

Match: 0%

7. Click Done

8. You will be taken back to the Retirement Savings Election screen that will reflect your elections. **You will notice that if you are eligible for a match, the match appears on the confirmation screen as 0.**

Retirement Savings Elections

Pam Beesly [Actions](#)

Edit

Retirement Savings Elections 2 items

Benefit Plan	Employee Contribution
403(b) Roth - TIAA	Percent 5
403(b) Match - TIAA	Percent 0

