

Re-election of SRA Deductions as a Percentage Job Aid

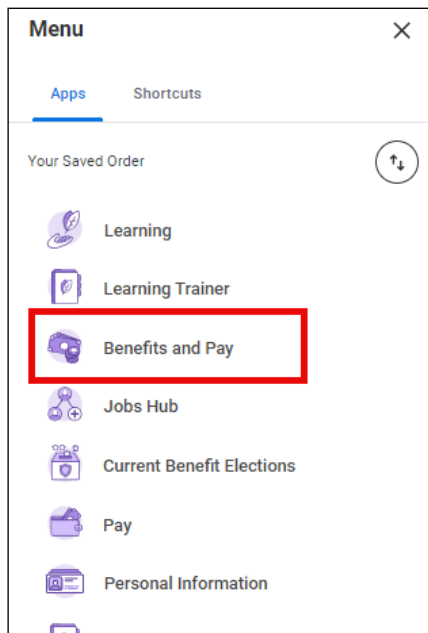
Workday Job Aid for Employees

Overview

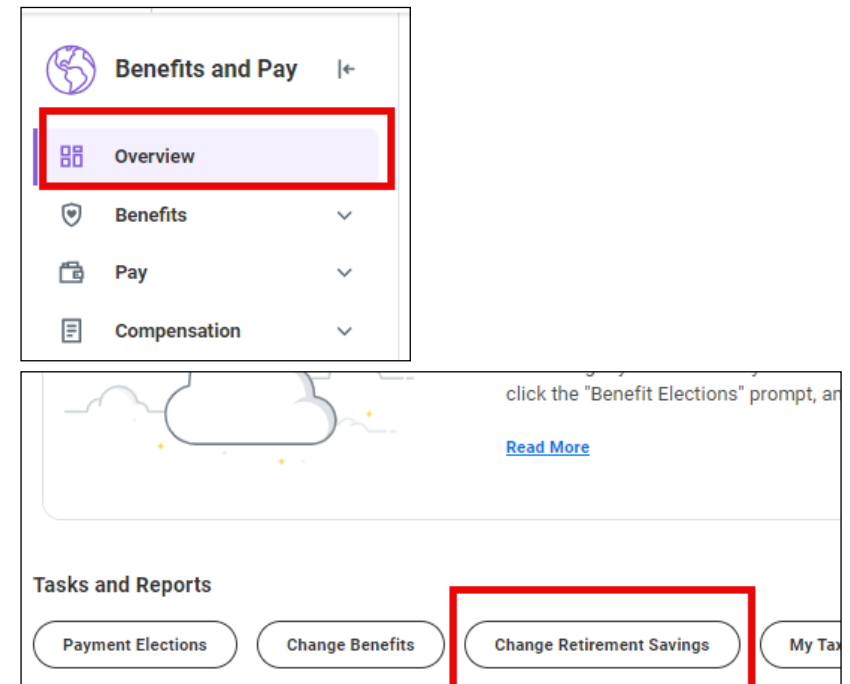
This Job Aid will show you how to manage your re-elections for the Supplemental Retirement Annuity (SRA) deductions in Workday. A new percentage election is required for SRA deductions to continue. Your flat dollar election will be cancelled as of March 1 and your contributions will not resume until a new percentage election is entered in Workday. Employees should confirm their percentage contribution before beginning this process.

Change Retirement Savings

1. From the Workday homepage, click **View All Apps** and select the **Benefits and Pay** application. *Alternatively*, click **MENU** and select the **Benefits and Pay** application.



2. On the **Overview** tab, click on **Change Retirement Savings**.



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- The **Change Retirement Savings** pop-up appears. The date always defaults to the current date; you must change the date to **03/01/2025**. Click **Continue**.

Change Retirement Savings

Benefit Event Date

03/01/2025

- Your current enrolments will populate. Click **Manage** under 403(b) and/or 457(b) if you are already enrolled in a flat dollar amount, or click **Enroll** under 403(b) and/or 457(b) if you are setting up a NEW election.

Change Retirement Savings

Projected Total Percentage
0%
Projected Total Amount Per Paycheck
\$1,300.00

Retirement

403(b)
TIAA (Amount)

Contribution per paycheck
\$1,300.00

Manage

457(b)
Waived

Enroll

Important: You **MUST** have your applicable vendor account(s) (i.e., Corebridge, Equitable, TIAA, Voya) set up **BEFORE** setting up your SRA election. It will not be approved by HR until the vendor account is completely set up.

- The **Plans Available** will populate. Scroll down to your current vendor (in this example, TIAA). Choose **Select** for the TIAA (%).

If you choose to waive the dollar amount (optional), **change your flat dollar election from Select to Waive**. If you choose to leave the flat dollar as is for HR to delete, then no action is required for that election. **DO NOT leave the button on Select and then change the amount to zero.**

Click **Confirm and Continue**.

Projected Total Percentage
0%
Projected Total Amount Per Paycheck
\$25.00

Plans Available

Select a plan or Waive to opt out of 403(b).

8 Items

Benefit Plan	*Selection	You Contribute (Bi-weekly)	Company Contribution (Bi-weekly)
	<input checked="" type="radio"/> Waive		
Equitable (Amount)	<input type="radio"/> Select <input checked="" type="radio"/> Waive		
TIAA (%)	<input checked="" type="radio"/> Select <input type="radio"/> Waive		
TIAA (Amount)	<input type="radio"/> Select <input checked="" type="radio"/> Waive	\$25.00	
Voya (%)	<input type="radio"/> Select		

Confirm and Continue
Cancel

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- The page for your selected vendor percentage plan will populate. Enter the **Contribution (%)** and click **Save**.

403(b) - TIAA (%) (Step 1 of 2)

Projected Total Percentage Projected Total Amount Per Paycheck

Contribute

Enter how much you want to contribute as a percentage.

Contribution Type Percentage

Contribution (%)

Minimum Percentage:

Maximum Percentage:

- The **Change Retirement Savings** page populates. Click **Review** and verify the percentage amount.
- Click **Submit** and click **Done**.

Selected Benefits 1 item						
Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
403(b)	01/01/2025	01/01/2025	1%			Included
TIAA (%)						

Note: The new percentage election requires approval by HR. You **MUST** have your applicable vendor account(s) (i.e., Corebridge, Equitable, TIAA, Voya) set up **BEFORE** setting up your SRA election. It will not be approved by HR until the vendor account is completely set up.