



Retirement Enrollment Instructions: Step 1

New hires and newly eligible University Staff may elect the Arizona State Retirement System (ASRS) or the Optional Retirement Plan (ORP). If an election is not made within 30 days of your hire/eligibility date, your retirement plan will irrevocably default to ASRS. You must enroll through both UAccess Employee and the investment provider website.

- Go to UAccess Employee/Manager Self Service at <u>uaccess.arizona.edu</u> and log in using your NetID and password.
- 2. Select **UA Employee Main Homepage** from the dropdown menu.
- 3. Click on the University Benefits tile.



 Select Benefits Enrollment from the vertical toolbar on the left-hand side. You will see a Your Benefit Events box.

C UA Employee Main Homepage	Benefit Details					
Benefits Summary						
🙀 Life Events - Coming Soon	Benefits Enrollment	Benefits Enrollment				
🗞 Your Dependents/Beneficiaries	The Information Icon provides y The Start button next to an eve	The Information Korp provides you with additional Information about your enrolment. The Safe hutchine note all an event inserval is a concered you for enrolment. Use the Safe values not begin your enrollment. Nate: Borne events may be temporarily closed until you have completed enrolment for a pitcr event.				
😸 Benefits Enrollment	Note: Some events may be terr					
Document Upload Your Benefit Events						
	Event Description O		Event Date O	Event Status 0	Job Title C	
- Benefit Statements	Retirement Election (ORP clig)	0	10/11/2021	Open		Start

The event description will be **Retirement Election** (ORP elig) or 401a Retirement, no wait. Click the Start button.

 The next screen has two sections. Scroll to the lower section, which reads Benefit Plans. Click the Select button on the 401a Retirement (ORP elig) plan card.

Benefit Statements	Your Pay Period Cost \$0.00
Affordable Care Act	Status Pending Review
Qualified Tuition Reduction	Submit Enrollment
Contact Human Resources	Benefit Plans
	401a Retirement (ORP elig)
	Current No Coverage
	New ASKS Status Pending Review

 The ORP Vesting Certification will pop up. If you plan to choose the ORP and have funds on account at another institution, you may qualify for immediate vesting. Provide your response, then select Accept to proceed.

Benefits Enrollment	form and print it for your records. You can al Click on the plan card below to make your e	Benefits Certificate
Document Upload	✓ Enroliment Summary	ORP Vesting Certification Yes will used to activity by ORP security with an ORP useday. Excellenced instructions will be securited before
Benefit Statements	Your Pay Period Cost \$0.00	you submit your election in the subsequent section. You may also visit the Division of Human Resources website.
🏦 Affordable Care Act 🛛 🗸	Status Pending Res	I will establish an ORP account with one of the approved ORP vendors.
Qualified Tuition Reduction v	Submit Er	Selection Ves, Fidelty
Contact Human Resources	Benefit Plans	Ves, TMA No, selecting ASRS
	401a Retirement (ORP elig) Current No Coverage New ASRS Status Pending Review	If electrics (DRF) related if you may qualify for immediate vesting. If electring ABRS, select to? Answer These, Immy qualify Tese, Indian qualify Tese (and the backeting assessed the quastions above. (Accept) Regist.

7. On the following screen, click the **Select** button next to the plan you wish to enroll in (ASRS, Fidelity ORP, or TIAA ORP), then click **Done.**

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ou may o esource	choose one of tv s website.
Enroll	in Your Plan
	Plan Name
~	ASRS
Select	Fidelity ORP

8. You will then be redirected to the Benefits Enrollment homepage. The 401a Retirement (ORP elig) plan card will display a Status of **Changed.**

	Benefit Details
Benefits Enrollment	
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INPORTANT:	
Please make sure to click on the "Submit Enrolment" button aft form and print it for your records. You can always review your o	or you elect your retroment plan. Your election will be finalized only after you submit. You will be able to view your "Enrollment Submission" Inchion after you submit by clicking on the 'Ny Benefits Statements' tab to the left
Click on the plan card below to make your election. Note: Your	etrement plan choice is irrevocable after your initial enrollment.
- Enrollment Summary	
Your Pay Period Cost \$0,00	Full Cost \$0.00
Status Pending Review	
Submit Errollment	
Benefit Plans	
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401a Retirement (ORP elig)	1
Contract Mr. Contractor	
New ASRS	
Status Changed	
Pay Period Cost (\$U.UU	
select	

If you are certain of your choice, select the **Submit** Enrollment button.

9. A confirmation box will pop up, indicating you have enrolled successfully. Click **View** to access your Submitted Enrollment statement.

\$0.00	Return Benefits Alerts	View
Pending Review	Instructions	
Submit Enrollment	Thank you for successfully submitting your enrollment.	
	Select 'View' to carefully review your submitted enrollment.	
	A confirmation statement will be available within 24 hours.	
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Retirement Enrollment Instructions: Step 2

If you are enrolling in the Optional Retirement Plan (ORP):

Visit the appropriate investment company website to establish your account.

Fidelity Investments: Click on Enroll Now and use Plan ID 67444

<u>TIAA</u>: Click on **Ready to Enroll**, select the **University of Arizona** as your employer from the dropdown menu. Under the **Arizona University System Optional Retirement Plan** heading, click on **TIAA Account Online** then **Register Now.** Use **Access code AZQ192**.

If you are enrolling in the Arizona State Retirement System (ASRS):

Visit the <u>ASRS website</u> and complete the online registration using **Enrollment Code 69V00040.**

Voluntary Benefits Enrollment Instructions

NOTE: You must make your retirement choice **first**. The morning after you submit your retirement election, your voluntary benefits will open for election.

 Go to UAccess Employee/Manager Self Service at <u>uaccess.arizona.edu</u> and login using your NetID and password.

2. Select **UA Employee Main Homepage** from the drop down menu.

3. Click on the University Benefits tile.



The event description will be **Hire.** Click the **Start** button.

5. An election is required for each benefit option (medical, dental, vision, and so on).



To begin, click **Select** on the medical plan card.

Click the Overview of All Plans link to view costs for each plan.

6. Elect or waive medical by clicking the **Select** button next to the corresponding Plan Name.

4.	Select Benefits Enrollment from the vertical toolbar on
	the left-hand side. You will see a Your Benefit Events
	box.

C UA Employee Main Homepage	Benefit Details					
Benefits Summary						
👸 Life Events - Coming Soon	Benefits Enrollment The information icon provides you with additional information about your enrollment. The Start button next to an event means it is ourrently open for enrollment. Use the Start button to begin your enrollment.					
🗞 Your Dependents/Beneficiaries						
🔀 Benefits Enrollment	Note: Some events may be	Note: Some events may be temporarily closed until you have completed enrollment for a prior event.				
Document Upload	Your Benefit Events					
Event Description			Event Date 0	Event Status 0	Job Title O	
Affordable Care Act	Hiro	0	10/18/2021	Open	Disability Resources Pro II Start	



the university of arizona Human Resources

 You may enroll your dependent(s) by selecting the Add/Review Dependents button located in the middle of the screen.

Please add your dependents and/or beneficiaries before continuing. Social security numbers are required for all enrolled dependents.

- Once you have elected your healthcare vendor and enrolled your dependents, if any, click the **Done** button on the upper right corner. You will then be redirected back to the Benefits Enrollment homepage. A Status of **Changed** and **Pay Period Cost** will display under the corresponding benefit option (plan card).
- Proceed by clicking Select for each voluntary benefit option (plan card). Repeat instructions 5–8 to elect or waive that benefit.

Benefits Enrollment Instructions

You must select Waive for all benefits you do not want to elect or you will not be able to complete your enrollment.

- 10. After you have made all your benefit elections, click Submit Enrollment located on the Benefits Enrollment homepage (under the Enrollment Summary section).
- 11. A confirmation box will pop up, indicating you have enrolled successfully. Click **View** to access your Submitted Enrollment statement.

\$0.00 Pending Review	Return Benefits Alerts	View
Submit Enrollment	Instructions Thank you for successfully submitting your enrollment.	-1
	Select 'View' to carefully review your submitted enrollment.	
	A confirmation statement will be available within 24 hours.	
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Questions? Contact the Division of Human Resources at 520-621-3660 or email <u>hrsolutions@email.arizona.edu</u>.