



## 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.**

1. Go to **UAccess Employee/Manager Self Service** at [uaccess.arizona.edu](http://uaccess.arizona.edu) and log in using your NetID and password.
2. Select **UA Employee Main Homepage** from the drop-down menu.
3. Click on the **University Benefits** tile.



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

Open Benefit Events

Event Description	Event Date	Event Status	Job Title	
Retirement Election (ORP elig)		Open		Select

The event description will be **Retirement Election (ORP elig)**. Click the **Select** button.

6. Click the **Edit** button in the **Enrollment Summary** section to continue.
7. The ORP Account and Vesting Certification pop-up will appear. Answer the questions to proceed.

Benefits Certificate x

**ORP Vesting Certification**

You will need to establish an ORP account with an ORP vendor. Enrollment instructions will be provided before you submit your election in the subsequent section. You may also visit the Division of Human Resources website.

I will establish an ORP account with one of the approved ORP vendors.

Selection

Yes, Fidelity

Yes, TIAA

No

Enrolling in ASRS

I believe I may qualify for immediate vesting of employer contributions in the ORP.

Answer

Yes, I may qualify

No, I do not qualify

I have honestly answered the questions above.

8. You will be redirected to the 401a Retirement (ORP elig.) page.
- Select an Option**
- Here are your available options:
- Select one of the following plans:

Plan Name

ASRS

Fidelity ORP

TIAA ORP

9. Select your retirement plan by clicking the radio button  next to the plan name. Click **Update and Continue** to move on.
10. Next, you will be asked to confirm your election. Click the **Update Elections** button.
11. You will be redirected to the Enrollment Summary landing page. **Complete your enrollment by clicking** **Save and Continue**.
12. Once you are ready to finalize your retirement election, select **Submit**. Your Confirmation Statement will pop up in a new window. Please return to your enrollment and click **OK** to have your confirmation statement emailed to you. Be sure to save or print your enrollment confirmation for future reference. It may be requested if there are any inconsistencies with your enrollment.

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



## 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**

**TIAA:** Click on **Ready to Enroll**, select the **University of Arizona** as your employer from the drop-down 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 [ASRS website](#) 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 [uaccess.arizona.edu](http://uaccess.arizona.edu) and login using your NetID and password.
- Select **UA Employee Main Homepage** from the drop down menu.
- Click on the **University Benefits** tile.



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

Open Benefit Events			
Event Description	Event Date	Event Status	Job Title
Hire		Open	

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

- Under the **Enrollment Summary** you will see **"An election is required, select 'Edit' to continue"** for each benefit option (medical, dental, vision, and so on)



- Starting with medical, select the  button.

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

- Waive coverage or elect your healthcare vendor by clicking the radio button  next to the vendor's name.



## Benefits Enrollment Instructions

9. You may enroll your dependent(s) by selecting **Add/Review Dependents** toward the bottom of the screen.

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

10. Once you have elected your healthcare vendor and enrolled your dependents, if any, click **Update and Continue**. The final screen will display your chosen vendor and your per-pay-period costs. Click  to finalize your benefit plan election.
11. The **Enrollment Summary** landing page will now display your updated coverage status. Proceed by clicking  for the next voluntary benefit in the list. Repeat instructions 7–9 to elect or decline that benefit.

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

12. After you have made all your benefit elections, click  at the bottom of the **Enrollment Summary** page. You will then arrive at the **Submit Benefit Choices** screen. Confirm your benefit choices. If you want to change any of your elections, select  to go back and edit your choices.
13. Once you are ready to finalize your elections, select . Your Confirmation Statement will pop up in a new window. Please return to your enrollment and click  to have your confirmation statement emailed to you. Be sure to save or print your enrollment confirmation for future reference. It may be requested if there are any inconsistencies with your enrollment.

Questions? Contact the Division of Human Resources at 520-621-3660 or email [hrrsolutions@email.arizona.edu](mailto:hrrsolutions@email.arizona.edu).