

Retirement Enrollment Instructions Step 1 – Appointed Personnel

Appointed Personnel 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 and login using your NetID and password.
2. Select **UA Employee Main Homepage** from the drop down menu.
3. Click on the **Benefits** tile.



4. Select **Benefits Enrollment** from the vertical tool bar 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 Cert pop-up will appear. Answer the questions to proceed.

Benefits Certificate

ORP Account and Vesting Cert

Please answer the following questions. If you have not established an ORP account with an ORP vendor, please do so at this time. If you note that you may qualify for immediate vesting, you will receive an automated email with vesting instructions.

I have established an ORP account with one of the approved ORP vendors.

Selection

Yes, Fidelity

Yes, TIAA CREF

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 and will now record my ORP election.

Accept **Reject**

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

Update and Continue **Discard Changes**

9. Select your retirement plan by clicking the radio button next to the plan name. Click **Update and Continue** to continue.
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 submit your elections, 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.



Retirement Enrollment Instructions Step 2 – Appointed Personnel

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

Visit an 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, and click on **Arizona University System Optional Retirement Plan** hyperlink. Click **Register with TIAA** and 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**.

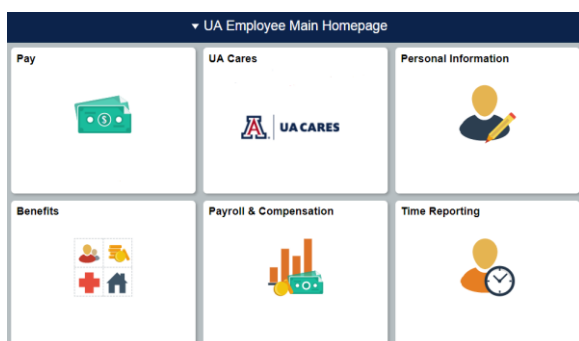
Retirement Enrollment Instructions – Classified Staff

Classified Staff are required to participate in the Arizona State Retirement System (ASRS). Enrollment in UAccess Self Service is automatic, but you must take action and enroll through the [ASRS website](#).

To enroll, visit the [ASRS website](#). The enrollment code is **69V00040**.

Voluntary Benefits Enrollment Instructions

1. Go to **UAccess Employee/Manager Self Service** at uaccess.arizona.edu and login using your NetID and password.
2. Select **UA Employee Main Homepage** from the drop down menu.
3. Click on the **Benefits** tile.



4. You will see an **Open Benefit Events** box.

Open Benefit Events				
Event Description	Event Date	Event Status	Job Title	
Hire		Open		<input type="button" value="Select"/>

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

5. Under the **Enrollment Summary** you will see **“An election is required, select 'Edit' to continue”** under each benefit option such as medical, dental, vision, etc.

Enrollment Summary				
Medical		Before Tax	After Tax	<input type="button" value="Edit"/>
Current:	United Health Care EPO EE Only			
New:	An election is required, select 'Edit' to continue			
Dental		Before Tax	After Tax	<input type="button" value="Edit"/>
Current:	Delta Dental EE Only			
New:	An election is required, select 'Edit' to continue			
Vision		Before Tax	After Tax	<input type="button" value="Edit"/>
Current:	Decline			
New:	An election is required, select 'Edit' to continue			

6. Starting with medical, select the button.

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

7. Elect or waive your healthcare vendor by clicking the radio button next to the vendor's name.

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

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

9. Once you have elected your healthcare vendor and/or enrolled your dependents, 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.

10. The **Enrollment Summary** landing page will now display your updated coverage status. Proceed by clicking on the next voluntary benefit following the steps above.

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

11. After you have made all of your benefit elections, click at the bottom of the **Enrollment Summary** page. You will then arrive at the **Submit Benefit Choices** screen. If you want to make any changes to your elections, select to go back and edit your choices.

13. Once you are ready to submit 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 HRsolutions@email.arizona.edu.