

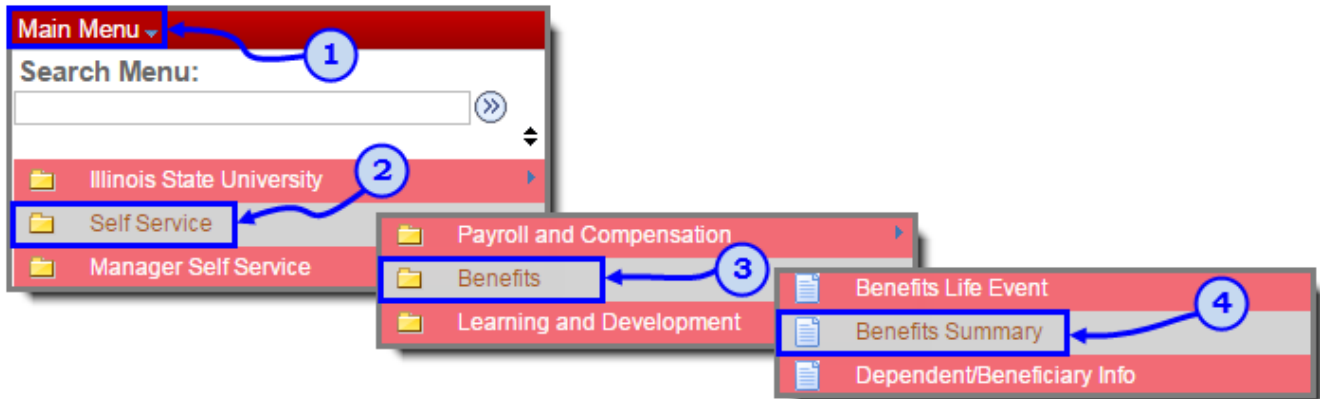


## How to Review and Make Contribution Changes to Your 403(b) Plan

This tutorial will be helpful for employees who need to review and/or make contribution changes to their 403(b) plan.

Navigation to Benefits Summary:

- 1) Click on **Main Menu** on your home page
- 2) Click on **Self Service**
- 3) Click on **Benefits**
- 4) Click on **Benefits Summary**



The following is an example of what your Benefits Summary will look like:

### Benefits Summary

To view your benefits as of another date, enter the date and select Go.

04/21/2015

Type of Benefit	Plan Description	Coverage or Participation
Medical	Health Alliance HMO	Employee Only
Dental	Delta Dental	Employee Only
Life	Basic Life	Salary X 1
Supplemental Life	Optional Life 4X Salary	Salary X 4
Accidental Death/Dismemberment	Basic Life + AD&D	Salary X 1

To enter into your 403(b) plan, click the red link on your Benefits Summary:

**Benefits Summary**

To view your benefits as of another date, enter the date and select Go.

04/21/2015

Type of Benefit	Plan Description	Coverage or Participation
Medical	Health Alliance HMO	Employee + 2 or more
Dental	Delta Dental	Employee + 2 or more
Civil Union Dental		Waived
Veteran Child Non-IRS Dental		Waived
Life	Basic Life	Salary X 1
Supplemental Life	Optional Life 8X Salary	Salary X 8
Accidental Death/Dismemberment	Basic Life + AD&D	Salary X 1
Child Life	Child Life	\$10,000
Supplemental AD and D	Optional AD&D 4X Salary	Salary X 4
Spousal Life	Spouse Life	\$10,000
Long-Term Disability	Prudential LTD	66.67% of Salary
<a href="#">403(b) TIAA-CREF</a>	TIAA-CREF Pre-Tax	5% Before Tax
Sick	Sick - 37.5 Hour Semi-Monthly	-----
Vacation	Civil Exempt Vac for Hourly	-----
Total of all Sick Hours	Sick Leave Balance Summary T&L	-----

Click link to view 403(b) details

To make a change to your contributions:

- 1) Select **Date** to view summary (either by typing in Date or using the calendar drop-down)
- 2) Click **Go**
- 3) Click **Edit**

**403(b) TIAA-CREF**

calendar drop-down

To view your benefits as of another date, enter the date and select Go.

04/21/2015  Go

**403(b) TIAA-CREF**

Plan Name TIAA-CREF Pre-Tax

Plan Provider TIAA-CREF

Group Number

Extension

**Current Contributions**

Before Tax 5%

After Tax 0%

Edit

[Return to Employee Benefit Summary](#)

To enter the new contribution, enter the new percentage here:

### Change Current Savings Plan Contributions

**403(b) TIAA-CREF** **TIAA-CREF Pre-Tax**

**This language and election form applies only to 403 plans currently at Illinois State University. If you have accessed this page through another referral source link (i.e. 457 plan) you will need to visit [Human Resources' Supplemental Retirement Planning page](#) and/or visit [CMS' page](#) directly.**

**I. AUTHORIZATION TO MAKE CONTRIBUTIONS**

I hereby direct the University to reduce my compensation (as defined under the Plan) each pay period by the percentage(s) outlined below which must equal at least \$200 annually, and to forward this contribution to the vendor identified above. I understand that contributions will be made to the Illinois State University Tax Deferred Compensation Plan ("Plan") on my behalf in accordance with my election, up to the maximum contribution limits set forth below in the **APPLICABLE PLAN CONTRIBUTION LIMITS** and **ADDITIONAL REPRESENTATIONS** sections of this Agreement, except that I must separately elect whether to use the 15 years of service catch-up limit (see below part III. and IV. of this Agreement for more information). I further understand that if my contribution for a pay period exceeds my compensation available for reduction, the University will reduce my contribution as necessary.

I understand *total percentage(s) elected cannot exceed 100% of includible compensation.* I hereby make the following contribution elections:

Current Savings Contributions		
Before Tax	5.00	
After Tax		

New Savings Contributions		
Before Tax		
Percent	10.000	Maximum 100.000

To complete the change:

- 1) Click the "I agree" checkbox
- 2) Click **Save**

By clicking the "agree" and "save" buttons below, I am affirming my agreement to all statements and elections above.

Save

I agree

You will see the following confirmation after saving:



You may now navigate back to your Benefits Summary by following the return links or by using the Main Menu.

Other things to note regarding making contribution changes to your 403(b) plan:

- ✓ Eligible Savings Plans:
  - 403(b) TIAA-CREF
  - 403(b) TIAA-CREF ROTH
  - 403(b) Fidelity
  - 403(b) Fidelity ROTH
- ✓ The 403(b) plans are the only plans that allow edits from the Benefit Summary. Please review the “403(b) Contribution Changes” tutorial for more information.

Contact information:

- ✓ For more information regarding your Benefits Summary, please contact Human Resources at **438-8311**
- ✓ If you are having access issues, please contact **438-4357**