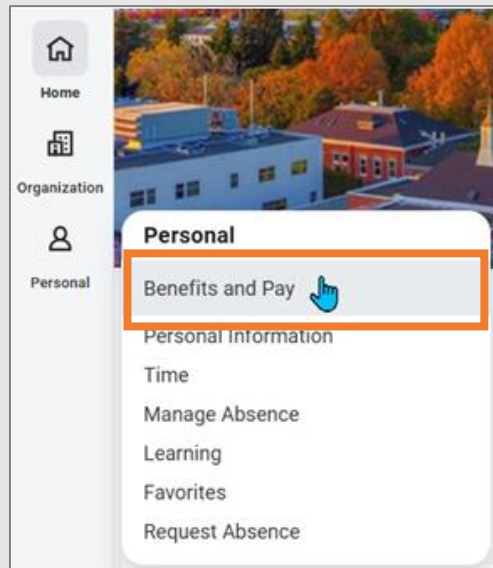


Introduction: You can change your voluntary retirement contribution through Workday at any time of the year by following the instructions below.

1. After logging into Workday, hover over the **Personal** icon in the left-hand navigation. From the menu that appears, select **Benefits and Pay**.



2. At the top of the resulting summary page, click the **Change Benefits** button from the buttons displayed.

Tasks and Reports

[Payment Elections](#)[Change Benefits](#)[My Tax Documents](#)

3. From the resulting menu, select **Retirement Contribution Change**. Enter the date you wish the change to be effective and click **Continue**.

Change Reason *

☐ Beneficiary Change

☐ Birth / Adoption of Child

☐ Commuter Contribution Change

☐ Dependent Gains Coverage from another source

☐ Dependent Loses Coverage from another source

☐ Divorce / Dissolution of Domestic Partnership

☐ Marriage / Domestic Partnership

☒ Retirement Contribution Change

Benefit Event Date *

01/31/2025

Submit

Save for Later

Cancel

4. A pop-up message will appear prompting you to open the change benefits elections task. Click **Open**.

You have submitted

Up Next: Mike Jones | Change Benefit Elections

[View Details](#)[Open](#)

5. Click Let's Get Started

Change Benefit Elections

For assistance with benefit changes, please contact HR at hr@willamette.edu or X6210.

Initiated On 01/08/2025

Submit Elections By 03/01/2025

Let's Get Started

6. Within the Voluntary 403(b) box, click **Manage**. If you are a new enrollee, click **Enroll**.

Retirement



Voluntary 403(b)

Fidelity (Pre-Tax)

Contribution per paycheck

\$ 100.00

[Manage](#)

7. Select the plan you wish to contribute to. Click the **Confirm and Continue** button to move on.

Plans Available

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

2 items

*Selection	Benefit Plan	Contribute (Monthly)	Company Contribution (Monthly)	Plan Details
☐ Select ☒ Waive	Fidelity (Pre-Tax)			Retirement
☐ Select ☒ Waive	Fidelity (Roth)			Retirement

8. Select how you wish to make your contribution, either a flat dollar amount, or a percentage.

Contribute

Enter how much you want to contribute as an amount or a percentage.

Contribution Type *

select one

select one

Amount

Percentage

9. Enter the amount or percent you wish to contribute.

Monthly Contribution (\$)

0.00

Contribution (%)

0

10. If you haven't already done so, enter beneficiaries by entering a name and percentage for each person.

Click the **Save** button at the bottom of the page.

Beneficiaries
Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 2 items

	Beneficiary	Percentage
		0
		0

11. On the following screen, click the **Review and Sign** button.

Review and Sign

Save for Later

- 12.
- Finally, review the information you have entered.
 - If it is correct, scroll down the page, read the Electronic Signature agreement, then check the box after **I Accept**.
 - Click **Submit**.
 - All changes go to the benefits manager for approval. If there are any questions the benefits manager will reach out, otherwise your change will be approved and take effect on the effective date entered.

I Accept ☒

Submit Save for Later Cancel