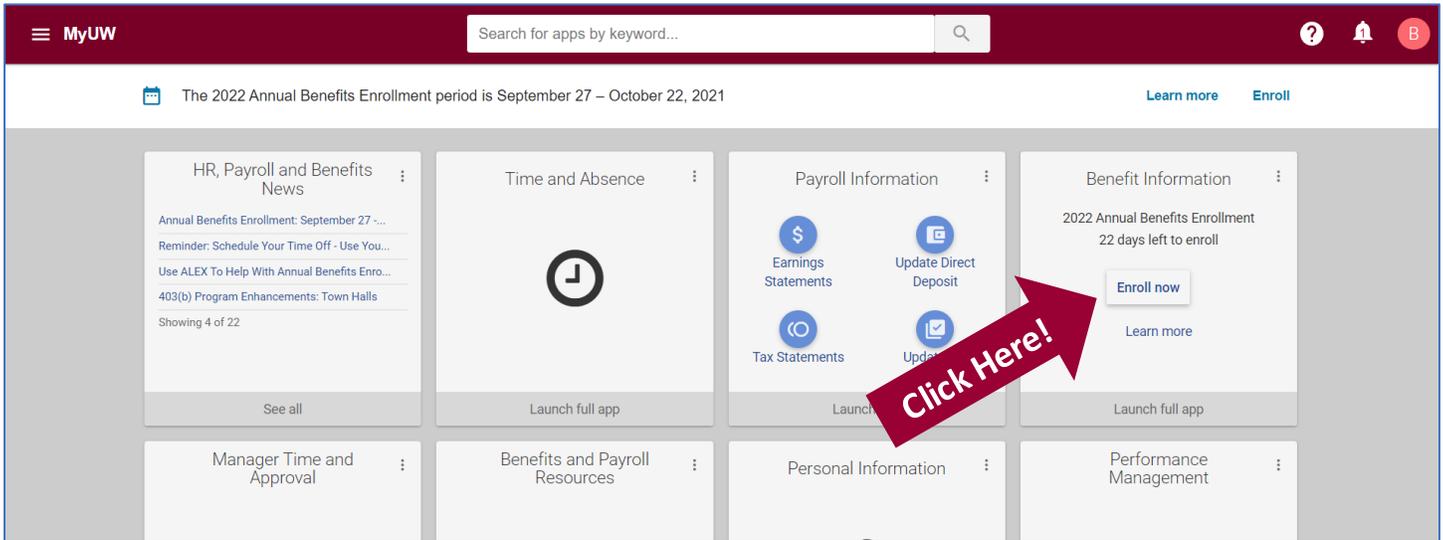


## Enrolling in the 403(b) During Annual Benefits Enrollment (ABE)

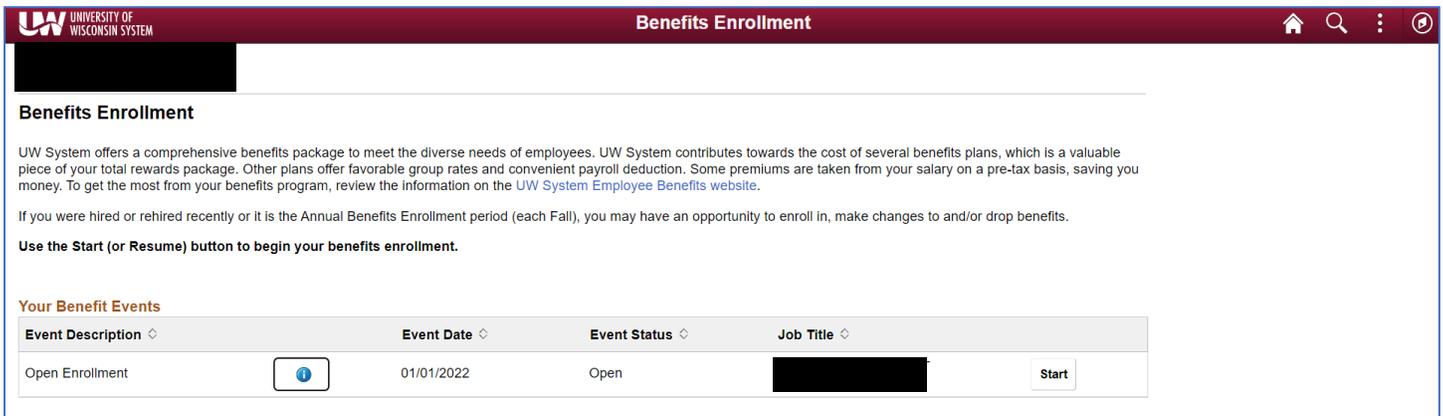
During Annual Benefits Enrollment (ABE), September 27 – October 22, 2021, you will have the opportunity to enroll in the 403(b) Program with TIAA and/or Fidelity. If you are already contributing to either of these recordkeepers, you can also confirm your election.

**IMPORTANT:** You should be prepared to complete the rest of your benefit elections and information. Once you press submit, you will not be able to get back in without contacting your benefits department.

1. Log into MyUW Portal ([my.wisconsin.edu](http://my.wisconsin.edu)). You will see a screen similar to the one below.
2. Click on the *Enroll Now* button under the *Benefits Information* tile.



3. Once the screen below shows, click on the *Start* button if you're ready to begin your elections for 2022.



Continue on Page 2.

- Work through Steps 1 – 4. There may be changes you need to make during these steps. Use the *Next* button at the right side of the screen to move through as you complete them.

- Once you get to Step 5: Annual Benefits Enrollment Elections, you will be presented with multiple tiles for your 2022 benefits, including your Health Insurance. Make sure you fill out the needed information for each of the tiles.
- At the bottom of the screen are four tiles for the UW 403(b) Program:
  - 403(b) Fidelity – the Fidelity pre-tax option
  - 403(b) TIAA – the TIAA pre-tax option
  - Roth Fidelity – the Fidelity after-tax option
  - Roth TIAA – the TIAA after-tax option

If you currently contribute to T. Rowe Price, Ameriprise, and/or Lincoln, a grayed out tile will show. This is your current contribution but you will not be able to enter anything into it.

Note: If you are currently contributing to one of TIAA and/or Fidelity, you will see the amount listed under the tile as the “Current” amount. In the example below, this person is currently contributing \$8.00 to the Fidelity pre-tax.

7. If you are a new enrollee with TIAA and/or Fidelity, continue to Page 4 for specific instructions. Then complete step 9.
8. If you currently contribute to TIAA and/or Fidelity, continue to Page 5-6 for specific instructions. Then complete step 9.
9. Once your 403(b) Program elections have been updated and you're finished with your enrollment, use the *Review Enrollment* to review your choices and the *Submit Enrollment* button to complete the enrollment process for 2022.

← Exit
⋮
UW Open Enrollment

Enrollment Period 9/27/2021 - 10/22/2021
← Previous

1

Welcome Open Enrollment

Visited

2

Video

Visited

3

Acknowledgement

Complete

4

Review and Update

Visited

5

Annual Benefits Enrollment Elections

Visited

### Step 5 of 5: Annual Benefits Enrollment Elections

The Enrollment Summary below displays your per pay period cost, the status of your elections and the employer cost of your benefits.

- Click **Review Enrollment** to view your current elections,
- Click **Submit Enrollment** if you are **done** making your elections or
- Scroll down to the Benefit Plans section and **click Review for each plan to make changes**.

**Note:** The UW 403(b) Supplemental Retirement Program (SRP) is being enhanced effective January 1, 2022. As part of the Annual Benefits Enrollment for 2022 you can make changes to your 403(b) contribution election(s) or enroll in the 403(b) Program. Click on the following tiles below to make changes: 403(b) Fidelity, 403(b) TIAA, Roth Fidelity, Roth TIAA. You can enroll in or change your elections in the UW 403(b) SRP at any time.

Your Enrollment Summary below displays costs; however, it does not include any 403(b) Program election(s).

The 403(b) Program tiles will indicate "0 Beneficiaries" since beneficiary information is not stored in the MyUW Portal. To add/change a beneficiary for the 403(b) Program or for additional information about the 403(b) Program, review the [UW 403\(b\) Supplemental Retirement Program webpage](#).

▼ Enrollment Summary

Your Pay Period Cost	Full Cost
Status <b>Pending Review</b>	Employer Cost

Review Enrollment

Submit Enrollment

**If you are a new enrollee with TIAA and/or Fidelity:**

1. Click on the pre-tax and/or after-tax tile for the recordkeeper(s) you would like to contribute to in 2022. In the example below, Roth Fidelity (after-tax) has been selected.
2. If you wish to enroll, click on the *Select* button next to the plan name.

**Cancel** Roth Fidelity **Done**

The UW 403(b) Supplemental Retirement Program (SRP), formerly the UW Tax-Sheltered Annuity (TSA) 403(b) Program is a supplemental retirement savings program. Through the UW 403(b) SRP, you can invest a portion of your income for retirement on a pre-tax basis, an after-tax basis (Roth), or a combination of both. Participation in the UW 403(b) SRP is voluntary with employees making the entire contribution. Review the link under the Resources section for additional information.

**Enhancements** are being made to the UW 403(b) SRP effective **January 1, 2022**. TIAA and Fidelity will remain as the recordkeepers available in the program. If you are currently contributing to T. Rowe Price, Ameriprise, and/or Lincoln you can change your contribution election(s) to TIAA or Fidelity (or you may stop your contributions to the program). If you do not take action, your current contribution election(s) to T. Rowe Price, Ameriprise, and/or Lincoln will move to TIAA. For additional information on the enhancements to the program, review the [UW 403\(b\) Program Enhancements webpage](#).

**Resources**  
UW 403(b) SRP

▼ **Enroll in Your Plan**

Plan Name	
Select	Roth Fidelity
Select	Waive

3. Choose either a flat dollar amount or a percentage of pay to enter into the respective text box at the bottom of the screen. Click the green *Done* button once you've made your choice.

**Cancel** Roth Fidelity **Done**

The UW 403(b) Supplemental Retirement Program (SRP), formerly the UW Tax-Sheltered Annuity (TSA) 403(b) Program is a supplemental retirement savings program. Through the UW 403(b) SRP, you can invest a portion of your income for retirement on a pre-tax basis, an after-tax basis (Roth), or a combination of both. Participation in the UW 403(b) SRP is voluntary with employees making the entire contribution. Review the link under the Resources section for additional information.

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**Resources**  
UW 403(b) SRP

▼ **Enroll in Your Plan**

Plan Name	
✓	Roth Fidelity
Select	Waive

▼ **Contributions**

You can enter your contribution as a percentage or flat dollar amount but not both.

- If you choose to enter a **percentage**, the sum of your before-tax and after-tax (Roth) contribution elections(s) cannot exceed 100%.
- If you choose to enter a **flat dollar amount**, the frequency is per paycheck.

Note: You cannot exceed the before-tax and after-tax (Roth) plan annual maximums.

After Tax Amount

After Tax Percent

Maximum After Tax Percent 100.00

If you would like to make more elections, continue doing so.

**If you currently contribute to TIAA and/or Fidelity:**

1. If you wish to continue contributing the same amount from your paycheck to your current recordkeeper, confirm that your current deduction is under the correct tile.

For example, if you are currently contributing \$8 pre-tax to Fidelity, the tile below shows the correct amount.

The screenshot shows the 'UW Open Enrollment' interface for the period 9/27/2021 - 10/22/2021. On the left is a navigation menu with five steps: 1. Welcome Open Enrollment (Visited), 2. Video (Visited), 3. Acknowledgement (Complete), 4. Review and Update (Visited), and 5. Annual Benefits Enrollment Elections (Visited). The main area displays four enrollment tiles: '403(b) Fidelity', '403(b) TIAA', 'Roth Fidelity', and 'Roth TIAA'. Each tile shows 'Current' and 'New' contribution amounts (all are 'No Coverage' or '\$8.00') and a status of 'Pending Review' with '0 Beneficiaries'. A red arrow points to the 'Review' button at the bottom of the '403(b) Fidelity' tile.

2. If you want to add an additional contribution, whether to your current recordkeeper but the other taxing option or to the other recordkeeper, click on that tile
3. Enter in your contribution amount as a flat dollar or percentage in the respective text box at the bottom of the screen.

The screenshot shows the 'Roth Fidelity' enrollment form. At the top left is a 'Cancel' button and at the top right is a 'Done' button. Below the title is a 'Resources' link with a globe icon and a box containing 'UW 403(b) SRP'. The main text explains the UW 403(b) Supplemental Retirement Program (SRP) and mentions enhancements effective January 1, 2022. Below this is a section titled 'Enroll in Your Plan' with a table:

Plan Name
<input checked="" type="checkbox"/> Roth Fidelity
<input type="checkbox"/> Waive

Below the table is a 'Select' button. Underneath is a section titled 'Contributions' with instructions: 'You can enter your contribution as a percentage or flat dollar amount but not both.' It lists two bullet points: 'If you choose to enter a percentage, the sum of your before-tax and after-tax (Roth) contribution elections(s) cannot exceed 100%' and 'If you choose to enter a flat dollar amount, the frequency is per paycheck.' A note states: 'Note: You cannot exceed the before-tax and after-tax (Roth) plan annual maximums.' At the bottom are two input fields: 'After Tax Amount' and 'After Tax Percent'. Below these fields is the text 'Maximum After Tax Percent 100.00'.

Continue on Page 6.

**If you currently contribute to TIAA and/or Fidelity (continued):**

4. If you no longer wish to contribute to your current plan/deduction, click into the appropriate tile and select Waive.

[Cancel](#) **403(b) Fidelity** [Done](#)

The UW 403(b) Supplemental Retirement Program (SRP), formerly the UW Tax-Sheltered Annuity (TSA) 403(b) Program is a supplemental retirement savings program. Through the UW 403(b) SRP, you can invest a portion of your income for retirement on a pre-tax basis, an after-tax basis (Roth), or a combination of both. Participation in the UW 403(b) SRP is voluntary with employees making the entire contribution. Review the link under the Resources section for additional information.

**Enhancements** are being made to the UW 403(b) SRP effective **January 1, 2022**. TIAA and Fidelity will remain as the recordkeepers available in the program. If you are currently contributing to T. Rowe Price, Ameriprise, and/or Lincoln you can change your contribution election(s) to TIAA or Fidelity (or you may stop your contributions to the program). If you do not take action, your current contribution election(s) to T. Rowe Price, Ameriprise, and/or Lincoln will move to TIAA. For additional information on the enhancements to the program, review the [UW 403\(b\) Program Enhancements webpage](#).

**Resources**

[UW 403\(b\) SRP](#)

▼ **Enroll in Your Plan**

Plan Name	
<a href="#">Select</a>	Fidelity
✓	Waive