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). You will see a screen similar to the one below.
- 2. Click on the Enroll Now button under the Benefits Information tile.

≡ MyUW		Search for apps by keyword	٩	e	🤉 🏚 🖪
	The 2022 Annual Benefits Enrollment	t period is September 27 – October 22, 2021		Learn more Enroll	
	HR, Payroll and Benefits : News : Annual Benefits Enrollment: September 27 Reminder: Schedule Your Time Off - Use You Use ALEX To Help With Annual Benefits Enro 403(b) Program Enhancements: Town Halls Showing 4 of 22	Time and Absence :	Payroll Information : Statements Update Direct Deposit Tax Statements Update Chiever Tax Statements Update Chiever Tax Statements Update Chiever Comparison Chiever Chiev	Benefit Information : 2022 Annual Benefits Enrollment 22 days left to enroll Enroll now Learn more	
	See all	Launch full app	Launch CIIC	Launch full app	
	Manager Time and : Approval	Benefits and Payroll : Resources	Personal Information	Performance : Management	

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

UNIVERSITY OF WISCONSIN SYSTEM		Benefits Enrol	Iment		Â	Q	:	Ø
Benefits Enrollment								
UW System offers a comprehensive benefits package to meet the diverse needs of employees. UW System contributes towards the cost of several benefits plans, which is a valuable piece of your total rewards package. Other plans offer favorable group rates and convenient payroll deduction. Some premiums are taken from your salary on a pre-tax basis, saving you money. To get the most from your benefits program, review the information on the UW System Employee Benefits website.								
If you were hired or rehired recently or it is the Annual Benefits Enrollment period (each Fall), you may have an opportunity to enroll in, make changes to and/or drop benefits.			benefits.					
Use the Start (or Resume) button to begin your benefits e	enrollment.							
Your Benefit Events								
Event Description \diamondsuit	Event Date ♦	Event Status ♦	Job Title 🛇					
Open Enrollment	01/01/2022	Open		Start				

4. 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.

٢	Exit	UW Open Enrollment
Enro	ollment Period 9/27/2021 - 10/22/2	2021
		Next >
1	Welcome Open Enrollment Visited	Step 1 of 5: Welcome Open Enrollment
2	Video Not Started	Welcome to the Annual Benefits Enrollment (ABE) period! This is your annual opportunity to make changes to most of your benefits for coverage effective for January 1 st . Coverage is for the entire calendar year, unless you have a qualifying life event (for example, marriage, birth of a child, etc.) that allows you to make a mid-year change to your benefits. Review the ABE web page for an overview of the changes for the upcoming
3	Acknowledgement Not Started	Note: If you will be covering your eligible dependents, have their information available (full name, SSN, date of birth*) before you begin your enrollment.
4	Review and Update v Not Started	*Date of Birth (DOB) is a required field; you will not be able to add your eligible dependents without their DOB. If an incorrect DOB is entered, documentation verifying the change will be required to make an update. Click on the "Next" button in the upper right corner to finish your enrollment.
5	Annual Benefits Enrollment Elections Not Started	

- 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.
- 6. At the bottom of the screen are four tiles for the UW 403(b) Program:
 - a. 403(b) Fidelity the Fidelity pre-tax option
 - b. 403(b) TIAA the TIAA pre-tax option
 - c. Roth Fidelity the Fidelity after-tax option
 - d. 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.

© Exit UW Open Enrollment					
Enrollment Period 9/27/2021 - 10/22/2	021				
				< Previous	
1 Welcome Open Enrollment					
Visited	403(b) Fidelity	403(b) TIAA	Roth Fidelity		
2 Video Visited	Current Fidelity \$8.00 New Fidelity \$8.00	Current No Coverage New No Coverage	Current No Coverage New No Coverage		
3 Acknowledgement Complete	Status Pending Review	Status Pending Review	Status Pending Review		
4 Review and Update Visited					
Annual Benefits Enrollment	Review	Review		Review	
Visited	Roth TIAA	1			
	Current No Coverage New No Coverage Status Pending Review				
	Review				

- 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.

C Exit	© Exit UW Open Enrollment					
Enrollment Period 9/27/2021 - 10/22	/2021					
	< Pre	evious				
1 Welcome Open Enrollment Visited	Step 5 of 5: Annual Benefits Enrollment Elections	*				
2 Video Visited	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 to your operations or elections or elections of the status of your elections of the status of you					
3 Acknowledgement Complete	Click Submit Enformment by date done making your elections of 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 change to your 403(b) contribution election(s) or enroll in the 403(b) Program. Click on the following tiles below to make changes:	jes				
4 Review and Update Visited	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).	an				
5 Annual Benefits Enrollment Elections Visited	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.	e				
	← Enrollment Summary					
	Your Pay Period Cost Status Pending Review 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.

Incel Roth Fidelity				
The UW 403(b) Supplemental Retirement Program (SRP), formerly the UW Tax-Sheltered Annuity (TSA) 403(b) Program is a supplemental retirement s 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 ir with employees making the entire contribution. Review the link under the Resources section for additional information.	avings program. Through the UW the UW 403(b) SRP is voluntary UW 403(b) SRP			
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 pricontributing to T. Rowe Price, Ameriprise, and/or Lincoln you can change your contribution election(s) to TIAA or Fidelity (or you may stop your contributing take action, your current contribution election(s) to T. Rowe Price, Ameriprise, and/or Lincoln will move to TIAA. For additional information on the enhance the UW 403(b) Program Enhancements webpage.	ogram. If you are currently ons to the program). If you do not ements to the program, review			
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.

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	Resources
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.	UW 403(b) SRP
Enhancements are being made to the UW 403(b) SRP effective January 1, 2022. TIAA and Fidelity will remain as the record keepers 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.	
▼ 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 Amount 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.



- 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.

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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 Amount Maximum After Tax Percent 100.00	

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	Done			
The UW 403(b) Supplemental Retirement Program (SRP), forn	Resources			
403(b) SRP, you can invest a portion of your income for retirem with employees making the entire contribution. Review the link	UW 403(b) SRP			
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Plan Name				
Select Fidelity				
V Waive				