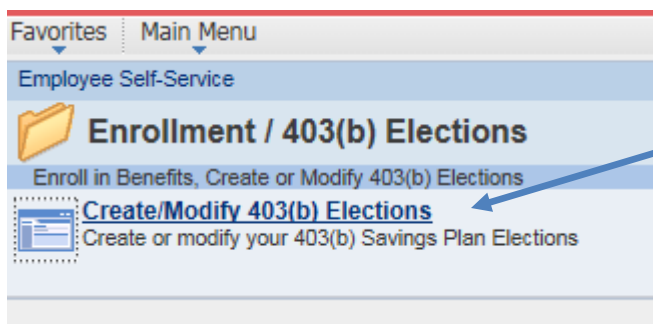


Updating 403(b) Voluntary Retirement Plan Information in Employee Self Service

When logging into Employee Self Service use the same User ID and Password used to log into other university systems such as email, VPN, SIS, etc. Please contact Tufts Technology Services at (617) 627-3376, or via email at it@tufts.edu for any assistance.

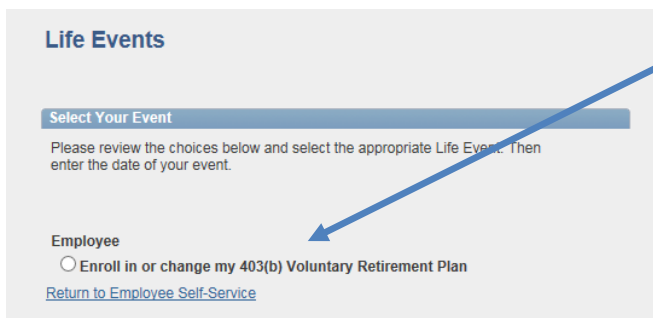
You can increase or decrease a current 403(b) plan contribution, begin a 403(b) plan contribution, or discontinue (waive) a 403(b) plan contribution through Employee Self Service. You can also change the percent of your 403(b) plan contribution allocated to Fidelity or TIAA/CREF. Changes can be made to the 403(b) plan as frequently as you like. Changes will always be effective on the first of the following month.

Log into Employee Self Service at <http://eserve.hr.tufts.edu/> to submit a 403(b) Voluntary Retirement Plan Life Event. On the Self Service menu, select **Benefits Information** and then **Enrollment/403(b) Elections**.



Select **Create/Modify 403(b) Elections** to begin your 403(b) Life Event.

On the below Life Events page, select **Enroll in or change my 403(b) Voluntary Retirement Plan**.



On the Change Status Date page, click **OK** to proceed to the next step.

Change Status Date

Your election will become effective on the first of the following month from today's date.

Please click **OK** to proceed to the next step.

Status Change Date

*Today's Date 03/23/2015

OK Cancel

On the Change Status Date page, click “OK” to proceed to the next step. The date will automatically populate to the current date.

On the **Welcome to Life Events** page, click **Next** or **Benefits Enrollment** to move to the next step in the process.

Add or Edit 403b Election

Benefit Enrollment

The system will process your benefit options, based upon the Life Event you have selected.

Select the **Start My Enrollment** button below to begin your benefit enrollment.

Once you click the below button, it may take a few seconds to process.

Start My Enrollment

Click the “Start My Enrollment” button to begin the enrollment process.



Click the **Select** button to open the page that you will use to make your changes.

Benefits Enrollment

Welcome to the 403(b) Voluntary Retirement Plan Update Process.

You can change your 403(b) election at any time. Changes or additions are always effective on the first of the following month.

Click the **Select** button below to make your changes.

Open Benefit Events					
Event Description		Event Date	Event Status	Job Title	
403B Savings Plan		03/05/2015	Closed	Assistant Professor	
403B Savings Plan		03/23/2015	Open	Assistant Professor	<input type="button" value="Select"/>

Once you click Select, it will take a few seconds for your benefits enrollment information to load.


Benefits Enrollment

403B Savings Plan

Below are your current 403(b) Voluntary Retirement Plan elections.

To make a change or enroll in the 403(b) Voluntary Retirement Plan, please click on the Edit button to the right.


Once you have entered your changes, please make sure you **store** your elections by clicking the **Store** button below and clicking **I Agree** to the salary reduction information.



Enrollment Summary		
403(b) Voluntary Ret Plan	Before Tax	<input type="button" value="Edit"/>
Current: Vol Retirement General Max	\$250.00	
New: Vol Retirement General Max	\$250.00	

Click **Store** to save your changes.

Or click the **I Have No Changes** button if you are happy with your prior elections and do not want to make any changes.

 **Important:** Your enrollment will not be complete until you **Store** your choices on this page and **Agree** to the salary reduction information. Your changes will take effect on first of the following month.

Select 'Edit' on this page.



You IRS maximum contribution will be displayed on the next screen. Remember that the contribution amount you enter will reflect your contribution per pay period.

- If you are paid on a **weekly basis**, you will calculate your per pay period contribution amount by dividing the amount you want to contribute on an annual basis by 52 pay periods.
- If you are paid on a **semi-monthly basis**, you will need to calculate your per pay period contribution amount by dividing the amount you want to contribute on an annual basis by 24 pay periods.

To change or add a contribution, indicate a pay period amount, up to your maximum allowed, in the contribution section. If you want to discontinue your 403(b) plan contribution, select “Waive”. If you would like to change the percent of your contribution invested in Fidelity or

TIAA/CREF, indicate the change in the “Designate your fund allocations” section of this page. Finally, click **Store** to hold your choices until you are ready to finalize.

Contributions

You must enter your contribution as a per pay period amount.

Before Tax

Pay Period Amount Your Annual Max 18000.00

Designate Your Vendor Selection(s)

Your 403(b) Voluntary Retirement Plan contributions must be allocated between Fidelity Investments and/or TIAA-CREF and must total 100%.

Fidelity
If you select Fidelity as your vendor of choice, your contributions will be sent to the Plan default, a Fidelity Lifecycle Fund. To redirect your contributions to other Fidelity investment funds, please contact Fidelity at 1-800-642-7131 or log on to www.fidelity.com/atwork.

TIAA-CREF
If you select TIAA-CREF as one of your vendors, you must invest 100% of your future contributions between the TIAA Traditional and/or CREF Stock Fund options. Please contact TIAA-CREF at 1-800-842-2776 or by logging on to www.tiaa-cref.org.

Until you contact TIAA-CREF to establish your investment funds, 100% of your future 403(b) Voluntary Retirement Plan contributions will be sent to the plan default, a Fidelity Lifecycle Fund.

EE Savings Investments Details

Fund Description	Current Percent Allocation	Investment Percent
TIAA/CREF	—	<input type="text"/>
Fidelity	100.00	<input type="text" value="100.00"/>
Total		100.00

Indicate per pay period amount.

Change your investment allocation(s).

Click “Store”.

On the next screen you will have an opportunity to review your choices. Click **OK** to continue or **Cancel** to make additional changes.

Benefits Enrollment

403(b) Voluntary Ret Plan

Your Choice
You have chosen a \$300 pre-tax deduction.
Please print this page for your records.

Your Investment Fund Allocations

Description	Investment Percent
Fidelity	100.00

Notes
Important: Your enrollment will not be complete until you **Store** your choices on this page and **Agree** to the salary reduction information. Once submitted this choice will take effect the first of the month following today's date.

Click **OK** to store your choices.
Click **Edit** to go back and change your choices.

Click “OK”.

Next click **Store** to save your changes and click **I Agree** on the Salary Reduction Agreement page to finalize your choices.

Benefits Enrollment

403B Savings Plan

Below are your current 403(b) Voluntary Retirement Plan elections.

To make a change or enroll in the 403(b) Voluntary Retirement Plan, please click on the **Edit** button to the right.

Once you have entered your changes, please make sure you store your elections by clicking the **Store** button below and clicking **I Agree** to the salary reduction information.

i

Enrollment Summary			Edit
403(b) Voluntary Ret Plan		Before Tax	
Current: Vol Retirement General Max		\$250.00	
New: Vol Retirement General Max		\$300.00	

[Store](#) [I Have No Changes](#)

Click **Store** to save your changes.

i Important: Your enrollment will not be complete until you **Store** your choices on this page and **Agree** to the salary reduction information. Your changes will take effect on first of the following month.

Click "Store" to save your choices.

Benefits Enrollment

Submit Benefit Choices

Authorize Elections

Salary Reduction Agreement - 403(b) Voluntary Retirement Plan

Effective with respect to all amounts payable on or after January 1, 2015, and continuing through the date on which my employment with the University ends or, if earlier, the date this agreement is terminated or superceded, my basic salary from the University shall be reduced by the amount I have selected. At the same time, the amount by which my salary is reduced will be contributed by the University to my annuity contract(s) and/or custodial account(s) under the Tufts University 403(b) Voluntary Retirement Plan (the "Voluntary Plan").

I understand that the amount described above will be paid to my Tufts University Retirement Plan account(s) at TIAA/CREF or Fidelity as designated by me.

Any prior salary reduction agreement that I have made under the Voluntary Plan is hereby superceded. I understand that I may enter into a new salary reduction agreement for the Voluntary Plan at any time by submitting a change online via Self Service or by completing an election form available from Tufts Support Services. Either I or the university may terminate this Agreement as of the date of termination.

[I Agree](#) [I Do Not Agree](#)

Your changes will take effect when you have read the terms above and have clicked I Agree.

Click **Cancel** if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Click "I Agree" to finalize your selections.

The system will display a screen indicating that the transaction was successful.

Benefits Enrollment

Submit Confirmation

Your benefit elections have been submitted to the Human Resources Benefits Office.

Click **OK** below, then click the **Event Completion and Exit** step on the following page under the left hand menu to finalize your event.

Select **OK** to finalize your event.

Once you select the **Event Completion and Exit** link in the left hand menu and then the **Completion** button on the following screen, your event will be finalized.

You will also receive an email message indicating that the event is now closed, your information has been successfully updated, and that changes will be effective on the first of the following month.

eBenefits

Life Events

- Welcome
- Benefit Enrollment
- Event Completion and Exit**

Add or Edit 403b Election

Benefits Enrollment

Welcome to the 403(b) Voluntary Retirement Plan Update Process.

You can change your 403(b) election at any time. Changes or additions are always effective on the first of the following month.

Click the **Select** button below to make your changes.

Open Benefit Events					
Event Description		Event Date	Event Status	Job Title	
403B Savings Plan	i	03/05/2015	Closed	Assistant Professor	
403B Savings Plan	i	03/23/2015	Submitted	Assistant Professor	<input type="button" value="Select"/>

Once you click Select, it will take a few seconds for your benefits enrollment information to load.

Click on "Event Completion and Exit" to proceed to the final step.

Event Completion and Exit

Click on the "Complete" button to finalize your event.