

# Updating Self-Funded Retirement Plan - 403(b) Information in Employee Self Service (eServe)

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.

If you have difficulty logging into eServe, please contact Tufts Technology Services at (617) 627-3376 or via email at [it@tufts.edu](mailto:it@tufts.edu)

You can enroll in the 403(b) Plan or change your current contribution through Employee Self Service (eServe). You can also change the percent or the dollar amount of your contribution as well as elect to defer your contribution to Fidelity and/or TIAA. Changes can be made to your Self-Funded Retirement Plan as frequently as you like. **Changes will be effective with the next available payroll.**

Log into Employee Self Service at <https://hrss.uit.tufts.edu/> and on the Self Service menu click on **Enrollment/403(b) Elections** and then **Create/Modify 403b Elections**.

The screenshot shows the 'Employee Self-Service' dashboard with a grid of menu items:

- Time Off Information**: Review time off taken and vacation, sick and personal time earned.
- Payroll and Compensation**: View Paycheck; Edit Deductions, Direct Deposit, Compensation History, etc.
  - View Paycheck
  - Direct Deposit
  - Notice of Deposit
  - Voluntary Deductions
  - Compensation History
  - W-4, W-2, W-2 Consent
- Benefits Information**: View Benefits and Dependents, Enroll in Benefits, 401(k), 403(b), etc.
  - Benefit Summaries
  - Enrollment / 403(b) Elections** (highlighted with a red box)
  - Confirmation Statements
  - Dependents and Beneficiaries
  - 1095-C Consent
  - View Form 1095-C
- Performance Planning & Review**: Employees and managers will use this form throughout the Performance Development Program Cycle, to create, edit and view performance plans, conduct checkpoint reviews and complete performance reviews for the fiscal year.
- Personal Information**: View or Update your Personal Information
  - Home and Mailing Address
  - Phone Numbers
  - Email Addresses
  - Emergency Contacts
  - Form I-9
  - Demographic Information
- Learning and Development**: View Training Summary; Enroll in a Course
  - Training Summary
  - Request Training Enrollment

This screenshot shows the 'Enrollment / 403(b) Elections' menu with the following options:

- Enroll in Benefits, Create or Modify 403(b) Elections
- Create/Modify 403b Elections** (highlighted with a red box)
  - Create or modify your 403(b) Savings Plan Elections

On **Savings Summary** page click on the **Self-Funded Retirement Plan** link.

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**Savings Summary**

Please note that your changes will be effective with the next available payroll

12/22/2017

**Benefits Summary**

Type of Benefit	Plan Description	Coverage or Participation
<b>Self-Funded Retirement Plan</b>	403(b) Voluntary Ret Plan	\$25 Before Tax
Univ-Funded Retirement Plan	Basic Retirement Plan Over 40	\$21 Contribution

**401(a) Basic Retirement Plan Vendor Selection**

[Change your 401\(a\) Vendor](#)

Go to [Savings Beneficiary Summary](#)

To enroll or make changes to your existing 403(b) contribution, click on the **Edit** button. Please note that if Tufts Support Services (TSS) is processing a payroll, the **Edit** button will not be available. Once the payroll has been completed the **Edit** button will display.

**Self-Funded Retirement Plan**

Please note that your changes will be effective with the next available payroll

12/22/2017

**Self-Funded Retirement Plan**

Plan Name 403(b) Voluntary Ret Plan

**Current Contributions**

Before Tax \$25

**Additional Information**

[Return to Savings Summary](#)

## Updating Self-Funded Retirement Plan - 403(b) Information in Employee Self Service (eServe)

To change your contribution amount, enter a flat dollar amount or a percentage of your pay. Remember that the contribution amount you enter will reflect your contribution per pay period.

- If you are paid on a **weekly basis and you want to contribute a flat dollar amount per pay period** you will calculate your contribution amount by dividing the amount you want to contribute on an annual basis by 52 pay periods (or the number of pay periods remaining in the calendar year).
- If you are paid on a **semi-monthly basis and you want to contribute a flat dollar amount per pay period**, you will need to calculate your contribution amount by dividing the amount you want to contribute on an annual basis by 24 pay periods (or the number of pay periods remaining in the calendar year).
- If you want to contribute a percentage of your pay enter a percentage in the 'Percent' box (up to a maximum of 100% of your available pay each pay period).

After you have made the change to your contribution amount or percent click on **Save**.

If you want to discontinue your 403(b) Plan contribution, enter a zero in both the Flat Amount **and** the Percent fields and click **Save**.

### Change Current Savings Plan Contributions

**Self-Funded Retirement Plan**                      **403(b) Voluntary Ret Plan**

To change your current savings plan contributions, enter the new percent or flat dollar amount.

**Current Savings Contributions**

Before Tax      25.00

After Tax

**New Savings Contributions**

**Before Tax**

Flat Amount	<input type="text" value="\$25.00"/>	Percent	<input type="text"/>	Maximum	100.000
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**Vendor Selection**

### Notes:

- You can choose either a percentage or dollar amount, but not both.
- The maximum indicated above refers to 100% of pay, not a dollar amount.
  - If you choose to defer 100%, after all of your other benefits elections, all eligible remaining pay will be deferred and you will receive no cash until you have deferred the annual IRS maximum of \$18,500 if you are less than age 50 or \$24,500 if you are age 50 or older by 12/31/2018.

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Then click on **Yes** on the **Wage Reduction Agreement** to complete your change.

### Message

Wage Reduction Agreement - 403b (24000,247)

#### Authorization For Deferral

Effective with the next available payroll after I complete this Salary Reduction Agreement ("Agreement"), I elect to defer the specific dollar amount or percentage of my annual compensation received from the University under the Tufts University Voluntary Retirement Plan ("Plan"). My compensation includes my salary or wages and all other compensation that I receive from the University that is includible in income. I understand that amounts deferred will be contributed to the Plan retirement account and allocated into the investment options I have selected. By making this election, I authorize the University to withhold from my pay the percentage or dollar amount of compensation described above and contribute it to the Plan. This Agreement supersedes any prior election I have made under the Plan and will remain in effect until it is terminated or changed by me. I understand I may terminate my election or change the percentage or amount of my contributions at any time with respect to compensation not yet payable by completing a new Salary Reduction Agreement.

To **Add** or **Change** your vendor selection for Fidelity and/or TIAA, click on the **Add/Change Fund Allocations** button below:

**Vendor Selection**

Add / Change Fund Allocations

Save

## Updating Self-Funded Retirement Plan - 403(b) Information in Employee Self Service (eServe)

Select the percent of your 403(b) contribution to send future contributions to Fidelity and/or TIAA then click on **Update Totals** and **Save**. If you want to direct future contributions to TIAA, **you must contact TIAA first to make a valid investment election before you can direct funds to TIAA. See below for additional details.**

**403(b) Voluntary Ret Plan Vendor Selection**

Lauren Hubbard

Enter your new fund allocations. The sum of your fund allocations must total 100 percent.

**You must enroll at TIAA before you can elect to send funds to the vendor.**

**Change your vendor selection(s).**

You can choose to invest your 403(b) employee contribution in either TIAA and/or Fidelity. The change would be effective with the next available payroll. Your total contribution between the two vendors must equal 100%.

Before you can select TIAA as one of your vendors, you must first contact TIAA at 1-800-842-2776 or by logging on to <http://www.tiaa.org/tuftsuniversity> and choosing to allocate your future contributions between the TIAA Traditional and/or CREF Stock Fund options. Until you complete this step, 100% of your future 403(b) contributions will be sent to the Plan default, an age appropriate Vanguard Target Date Fund offered through Fidelity.

If you select Fidelity as your vendor of choice, your 403(b) contributions will be sent to the Plan default, an age appropriate Vanguard Target Date fund. To redirect your contributions to other Fidelity Investment Funds, please contact Fidelity at 1-800-642-7131 or by logging on to [www.fidelity.com/atwork](http://www.fidelity.com/atwork).

If you have any questions, please contact Tufts Support Services at 617-627-7000 or via email at [tss@tufts.edu](mailto:tss@tufts.edu)

Fund	Current Percent	New Percent
Fidelity	100.00	<input type="text"/>
TIAA/CREF		

[Return to Change Current Savings Plan Contributions](#)  0.00

NOTES: Making a vendor selection change via eServe only affects future contributions, not current balances. \*

1. The option to choose TIAA as a vendor will not be available to you until you have contacted TIAA first to choose valid investment election(s).
2. Once you contact TIAA, generally within 10 days you will receive an email from TSS indicating that your investment election has been confirmed and directing you to log into eServe to request a vendor change.
  - o The effective date of the change will be the first available payroll after you make the vendor change election via eServe.

**\*Current balances may be transferred by contacting retirement plan vendors directly.** If you want to transfer your current fund balances between vendors within the Tufts University 403(b) Plan, you will need to contact the vendor to which you ultimately want the funds deposited. For example, if you have a 403(b) balance at Fidelity and would like to transfer the funds to TIAA, you would contact TIAA to assist you with the paperwork.

### **Contact Information:**

Fidelity Investments: 1-800-642-1731

TIAA: 1-800-842-2776

Tufts Support Services: 1-617-627-7000