

WASHINGTON AND LEE  
UNIVERSITY

HUMAN RESOURCES

## **WORKDAY INSTRUCTIONS – Changing Retirement Contributions**

\*If you are already contributing, start with #1 below. If you are not already contributing, start with #3 below.

1. From the main Workday page, click on the BENEFITS application
2. Under VIEW, click on BENEFIT ELECTIONS and make note on whether you are using TIAA or Fidelity, and whether you are contributing pre-tax or post-tax Roth. Once you have this information, click on the W&L logo in the upper left-hand corner to get back to the main Workday page
3. From the main Workday page, click on the BENEFITS application
4. Under CHANGE, click on BENEFITS
5. For Change Reason: scroll down until you see four options that begin with Retirement Savings Change. Which one you select will depend on whether your account is with TIAA or Fidelity, and whether you contribute pre-tax or post-tax Roth
6. Benefit Event Date: enter the date you want deductions to begin
7. Click SUBMIT
8. A message will pop-up. Click OPEN
9. Click LET'S GET STARTED
10. Click ENROLL under the account you chose to use
11. Click SELECT, and then CONFIRM AND CONTINUE
12. Contribution Type drop-down box: Select whether you want to contribute a specific dollar amount each pay period or a percentage each pay period
13. Enter the amount or percentage
14. Click SAVE and then REVIEW AND SIGN
15. On the Summary page, scroll down to click I ACCEPT, and then SUBMIT

*Founded in 1749*