Completing the Retirement Plan Enrollment and Contribution Changes form in Dayforce

1. Log into Dayforce (https://sso.dayforcehcm.com/albrightcollege) by selecting your "Employee" role

   This is very important as the Benefits feature is only available to employee roles and is not visible in the Manager roles

2. Navigate to Main Menu > Benefits or click on the Benefits Icon:

3. You will be presented with all available benefit enrollments at the top of the "Overview" section. Click on "Start Enrollment" next to Retirement Plan Enrollment and Contribution Changes:
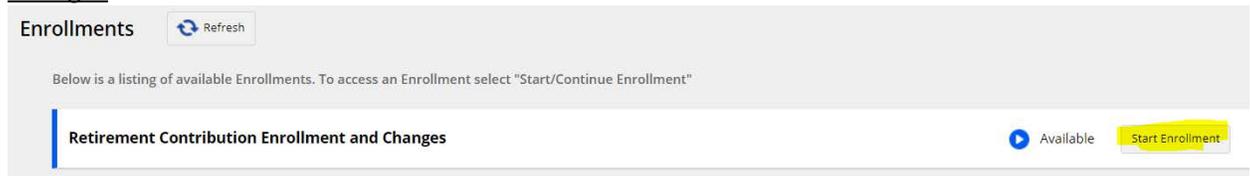
4. Please read the Introduction section in its entirety, as there is helpful information and links in this section to assist you in selecting plans and contribution amounts. On the right-hand side of the introduction, you will find a summary list of the plans and options you are eligible to participate in (your list may look different than the image below based on the plans you are eligible for):

   Click "Next" at the bottom of the "Introduction" page.

5. This takes you to the profile page, which is not required in this enrollment. Click "Next" again.

6. You are now on the "Elections" page. It is important to read all of the information carefully as there are multiple plans and options.

7. If you are eligible and want to receive the employer-offered match, you must elect either the "Match Eligible Pre-Tax Percentage" or "Match Eligible Post-Tax Percentage" option at the

required 5% employee contribution level. If you elect one of these options, you will also receive the 5% employer match.

8. If you are currently enrolled in any of the options, your current election will be automatically elected unless you unclick the blue check mark next to the selection:
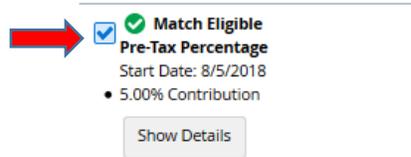
9. When making changes to contributions, you can view your current elections within the enrollment form itself by clicking on "Show Details" for any of the options. On the right hand side in the gray area, your current election summary will be listed:
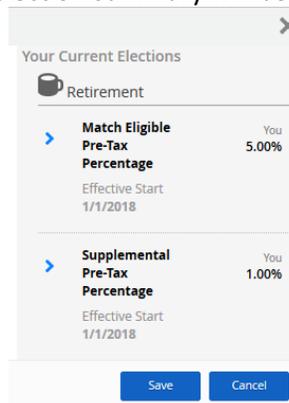
10. Any additional (Retirement Choice plan) or supplemental (Retirement Choice Plus plan) contributions made above the 5% match eligible election, can be made in increments as small as a tenth of a percent:

Please keep in mind, there are annual calendar year limits on contributions that should not be exceeded. These change annually and can be found on the IRS website.

11. If you are over the age of 50 and want to elect catch-up, you can do that as a flat dollar amount (up to the maximum allowed for that calendar year).

12. Any plans that you do not want to elect, please choose the "waive" option for that sub-section of the election form.

13. After all elections have been made, click "Next". You will have one final chance to review your elections on the next page. If you did not choose either a plan or the waive option for each section, you will receive an error message that reminds you to do so. Once the validation test has been met, you will be taken to the "Confirmation" page.

14. On the "Confirmation" page, you will have an opportunity to review all selected elections before submitting; however, your elections will not be finalized until you click "Submit Enrollment":

15. Once you submit your elections, you will be directed to the "Summary" section. This section details the next steps. If you are enrolling in the Albright College Retirement Plan for the first time, you MUST take additional action to register on the TIAA website. Please follow the instructions indicated on this page to finish your enrollment.

Congratulations, you've submitted your online Retirement Plan Enrollment and Contribution Changes form in Dayforce! Here are some helpful next steps if you enrolled in the retirement plan for the first time:

- All **new enrollments MUST** also register online at https://www.tiaa.org/albright click "Ready to Enroll". If you are already enrolled but never registered for online access, click "Log in" in the top right corner and then "Register for online access".
- During the online registration, you will choose investment options, name beneficiaries, and select your delivery preference for statements and plan documents.
- If you would like to make a qualifying rollover to your Albright College Retirement Plan please contact a TIAA representative at 1 (800) 842-2733.

It is recommended you review your personal information and selected beneficiaries on a frequent basis to ensure they are up-to-date on the TIAA website. It is each participant's responsibility to update this information as it is outside of Dayforce.

Thank you for submitting your elections, please contact the Human Resources Department or email HR@albright.edu if you have any additional questions.