



# TIAA-CREF ONLINE ADMINISTRATOR SERVICES

## ADMINISTRATOR SERVICES

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This application allows you to authorize administrators at your institution to become users of TIAA-CREF's Administrator Services, which provides access to the secure Plan Administrator website and the Administrator Telephone Center (ATC). These resources will provide the information and tools you need to efficiently administer your retirement plans.

You can use this application to add or delete users from your institution's authorized users list, and upgrade or remove a user's access to online functionality.

To complete this application, the following definitions will be helpful. There are two Authorization levels:

### PRIMARY AUTHORIZER

A Primary Authorizer is the administrator who has the authority to add, edit and delete other Plan Administrators at the institution. This authorization level may have access to one or more Administrator Services Functions.

### PLAN ADMINISTRATOR

A Plan Administrator is an administrator that has been authorized to use TIAA-CREF's Online Administrator services. A Plan Administrator cannot add, edit or delete the access rights of another administrator. This authorization level may have access to one or more Administrator Services Functions.

**NEITHER THE PRIMARY AUTHORIZER NOR ANY PLAN ADMINISTRATOR IS AUTHORIZED TO GRANT ACCESS TO ANY INDIVIDUAL OUTSIDE OF YOUR INSTITUTION THROUGH THE USE OF THIS FORM. ANY ACCESS TO AGENTS, REPRESENTATIVES OR SUBCONTRACTORS OF YOUR INSTITUTION MUST BE ADDRESSED SEPARATELY FROM THIS FORM.**

Once completed, please print, sign and fax, mail or e-mail to TIAA-CREF. Refer to page 5 for our fax number, mailing address and e-mail address.

Please note that missing signatures, incomplete or inaccurate information on this form will delay the adding/removal of access for the Plan Administrator, which can impact/delay their ability to access your institution's data available on our secure Plan Administrator website.

## SECTION 1: GENERAL INFORMATION

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Please indicate whether you are applying as a Primary Authorizer or a Plan Administrator at your institution. If you are a Primary Authorizer and are replacing a current user, complete the application for the replacement user and provide the name of the user(s) to be deleted in Section 5.

Provide the general information requested in Section 1 for the administrator who is being authorized to use TIAA-CREF's Administrator Services. E-mail addresses will remain confidential and will not be shared with any external entities.

### Check One

I am applying as a Primary Authorizer of my institution. Sign Section 6 and obtain the signature of the current Primary Authorizer. If you are the only Primary Authorizer at your institution, check here:

I am applying as a Plan Administrator of my institution. Sign Section 6 and obtain the signature of the Primary Authorizer.

I am a Primary Authorizer of my institution and am deleting access to TIAA-CREF's Plan Administrator Services for a Primary Authorizer and/or a Plan Administrator. Please complete the application for the replacement user (if applicable) and indicate the user to be deleted in Section 5.

CONTINUED ON NEXT PAGE



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## SECTION 1: GENERAL INFORMATION (CONTINUED)

### EDELIVERY TERMS AND CONDITIONS

By requesting we deliver any documents to you electronically, you agree to the following terms and conditions, and acknowledge you can electronically access, view, print and save these documents.

Your request to receive documents electronically requires you have Internet access and a valid email account. We will email you a notification when a document is available for viewing and you can thereafter log in to your secure TIAA-CREF account to access it. In the case of public documents like Prospectuses, Supplements, Annual Reports and Semi-Annual reports we will include a direct link to the document for your convenience.

Accessing public documents will not require you to log in to the secure site. Once you access the document, we provide the option for you to save it to your personal computer or print it. We may provide certain documents in portable document format, often referred to as a PDF. This format requires you use free Adobe Reader software, which you can download at [www.adobe.com](http://www.adobe.com).

Your preference selections remain effective until changed by you, or as the result of service necessity (e.g., incorrect or non-working email address), or upon notice from TIAA-CREF. Should you have any questions, wish to change your eDelivery preferences, or request a paper version of any document please contact your Managing Consultant. If your plan is serviced by the Administrator Telephone Center you can speak with a representative at **888 842-7782** Monday through Friday, 8 a.m. to 8 p.m. (ET).

When accessing the Internet, you may incur online subscription charges through your Internet service provider. TIAA-CREF, however, charges no fee for electronic delivery.

Prefix	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name		
<input type="text"/>		
Institution Name		
<input type="text"/>		
Title	Department	
<input type="text"/>	<input type="text"/>	
Street Address		
<input type="text"/>		
City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Number	Extension	
<input type="text"/> — <input type="text"/> — <input type="text"/>	<input type="text"/>	
E-mail Address	Fax Number	
<input type="text"/>	<input type="text"/>	



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**SECTION 2: PLAN ACCESS**

Indicate the plans you would like to access:

Authorize Access to all plans and campus/locations associated with my institution.

Authorize Access to only the following plans (must be six digits):


Authorize access to only the following campus/locations (for example, ABC University - XYZ Campus):


**SECTION 3: ADMINISTRATOR SERVICES FUNCTIONS**

Choose the applicable functions that apply to the user through the secure Plan Administrator website.

- Online Contribution List** - Create, edit and submit contribution lists online
- File Exchange** - Upload files (e.g., contribution remittance, enrollment, etc.)
- Electronic Funds Transfer (EFT)** - Remit contribution payments via Electronic Funds Transfer\*
- Enrollment** - Enable employees to enroll themselves online, enroll employees yourself (group plans) and create an online salary reduction agreement.
- Employment Status** - View/Update employee status dates
- Employee Search** - Access employee account information including current balance, contributions and last applied asset allocation.
- Plan Reporting** - Run/schedule/download reports about your plans and obtain Plan Financial reports.
- Vesting/Forfeitures** - Update/View employee vesting status and monitor plan forfeitures



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**SECTION 3: ADMINISTRATOR SERVICES FUNCTIONS (CONTINUED)**

The following functions are activities that are performed "offline" by a Plan Administrator:

- Contributions Contact** - Receive contribution correspondence
- Distribution Contact** - Authorize participant distributions
- Loan Contact** - Authorize participant loans
- Legal Agreement Contact** - Person authorized to execute legal documents with TIAA-CREF
- Compliance Contact** - Authorize plan compliance corrections
- Prospectus Delivery Contact** - Receive Prospectus correspondence  
Delivery Preference  Email  Mail

The following functions are applicable only for plan administrators supported by the Administrator Telephone Center.

- Administrator Telephone Center (ATC) Access** - Contact the Administrator Telephone Center (ATC) on behalf of your institution's plans:
  - Standard** - limited to general inquiries and requests (non-confidential data) and ordering supplies and forms
  - Plan Administration** - access to standard access with additional access to confidential employee and plan data

\*EFT authorization requires completion of the EFT Authorization Form found on the TIAA-CREF Plan Administrator website at [tiaa-cref.org/administrators](http://tiaa-cref.org/administrators).

**SECTION 4: SECURITY QUESTION AND ANSWER (REQUIRED)**

Please choose a security question and provide your answer. This will be used for authentication when you call TIAA-CREF.

- What is your mother's maiden name?
- What is the city/town where you were born?
- What is the name of the street you grew up on?
- What is your favorite sports team?
- What is the name of your pet?

Your Answer



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**SECTION 5: DELETE AN EXISTING USER**

This section is to be completed by a Primary Authorizer.

Please indicate any employee who should be deleted from your organization's list of Authorized Users. We will redirect all appropriate correspondence and information to the replacement user listed in Section 1.

Please delete the following individual(s) from our institution's list of Authorized Users:

Name	Title
<input type="text"/>	<input type="text"/>
Name	Title
<input type="text"/>	<input type="text"/>
Name	Title
<input type="text"/>	<input type="text"/>

**SECTION 6: SIGNATURES — REQUIRED**

If you are unsure of who your Primary Authorizer is for your institution please contact the Administrative Telephone Center at 888 842-7782.

Please read the Security Guidelines on page 6. All signatories must agree to abide by these Guidelines. Please note that missing signatures, incomplete or inaccurate information on this form will delay the adding/removal of access for the Plan Administrator, which can impact/delay their ability to access your institution's data available on our secure Plan Administrator website.

I have read, and will comply with, the security guidelines set forth in this application.

**Plan Administrator Name** — REQUIRED (Print)

Phone Number

Extension

 —  —  

E-mail Address

Signature

Date (mm/dd/yyyy)

  /  / 




## SECTION 6: SIGNATURES — REQUIRED (CONTINUED)

I have read, and will comply with, the security guidelines set forth in this application. I approve the Plan Administrator to have access to the Administrator Services indicated herein.

**Current Primary Authorizer Name** — REQUIRED (Print)

Phone Number

 —  — 

Extension

E-mail Address

Signature

Date (mm/dd/yyyy)

 /  / 

**New/Additional Primary Authorizer Name** (Print)

Phone Number

 —  — 

Extension

E-mail Address

Signature

Date (mm/dd/yyyy)

 /  / 

## RETURN COMPLETED APPLICATION(S) USING ONE OF THESE METHODS

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Fax to <b>800 842-5916</b>	Mail to <b>TIAA-CREF P.O. Box 1259 Charlotte, NC 28201</b>	E-mail <b>paservices@tiaa-cref.org</b>
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Be sure to send all pages together. TIAA-CREF will notify you once this Application has been processed.

Any information missing on this application will delay processing. If you have any questions about how to fill out this form, please call the Administrator Telephone Center at **888 842-7782**.

**NOTE:** You may download additional copies of this application from the TIAA-CREF Plan Administrator website at [www.tiaa-cref.org/administrators](http://www.tiaa-cref.org/administrators).

## SECURITY GUIDELINES

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The Administrator Services developed by TIAA-CREF allow authorized users of an institution to access certain information relating to such institution's participants' TIAA-CREF accounts and accumulations for the purpose of plan administration or counseling your employees.

**THE INFORMATION OBTAINED THROUGH THESE SERVICES IS EXTREMELY SENSITIVE AND HIGHLY CONFIDENTIAL, AND AUTHORIZED USERS OF THESE SERVICES AGREE TO MAINTAIN THE SECURITY OF THE SERVICES AND THE CONFIDENTIALITY OF THE INFORMATION.**

Use of these services signifies your agreement to comply with these security guidelines, and TIAA-CREF reserves the right to revoke access to these services for anyone who violates these guidelines.

From time to time, authorized representatives of TIAA-CREF may monitor the use of these services by authorized users; authorized users should not expect their use of the services to remain private and agree that TIAA-CREF may monitor and/or disclose their activity.

TIAA-CREF will revoke access for any authorized user who engages in improper conduct with regard to these services or the information obtained through the services. Examples of improper conduct include:

- Deliberately bypassing or probing security measures
- Disclosing or failing to protect any information contained in the website or disclosed by the ATC
- Failure to maintain the confidentiality of the security question and answer or the user ID and password
- Sharing the security question and answer, the user ID or password with any other individual
- Sharing or distributing proprietary or copyrighted software
- Using these services in connection with any unauthorized, illegal, fraudulent or unethical activities, or activities that may be embarrassing or detrimental to TIAA-CREF
- Introducing or attempting to introduce viruses into TIAA-CREF's systems
- Transmitting encrypted materials in violation of applicable laws, including but not limited to privacy and export laws

TIAA-CREF will not be held liable for the misuse of these services. In the event you or any authorized user terminates employment with your institution, TIAA-CREF requests that you notify us immediately and we will revoke these services.

**For Internal Use**  
OPS - PLNFRMERS

