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TIAA Retirement Healthcare Savings Plan

Benefits: – Enroll In, Amend or Stop Employee Contribution

Faculty and Staff

You do not need to wait until Open Enrollment to enroll in, amend or stop your employee contribution to your TIAA Retirement Healthcare Savings Plan.

USF will make its own contributions into a plan for you if you are aged 40 or over (10-year vesting period).

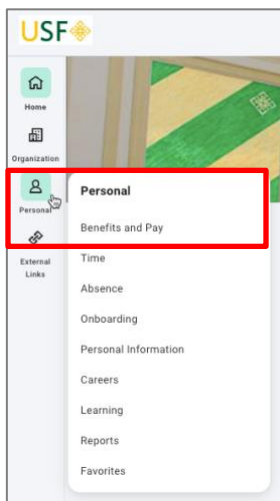
You can make your own post-tax contributions if you are aged 21 or over.

Please note: All employee contributions are **post-tax**. Amending your employee contribution does **not** affect any contribution that USF makes to this plan.

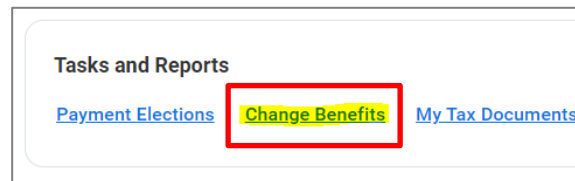
How to enroll in employee contributions

Follow these steps:

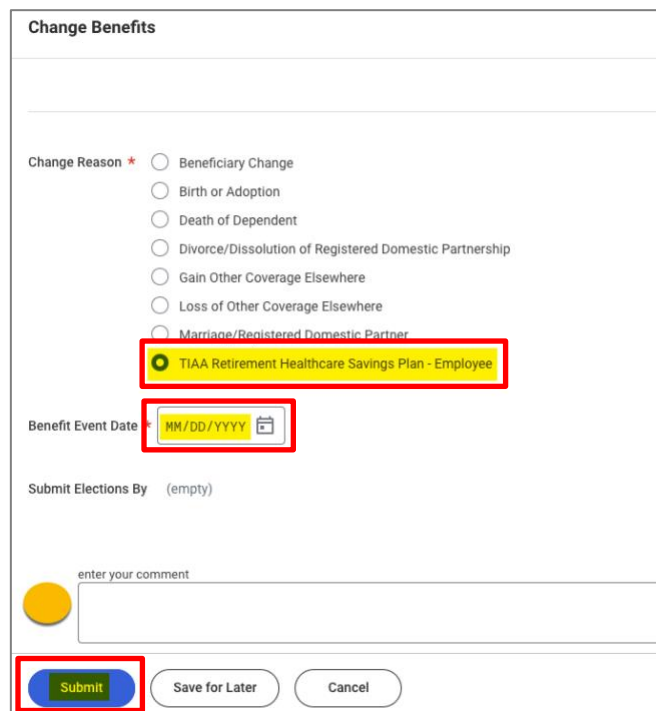
1. Log in to **USFWorks**, click **Personal**, and then **Benefits and Pay**.



2. On the next page, under **Tasks and Reports**, select **Change Benefits**.

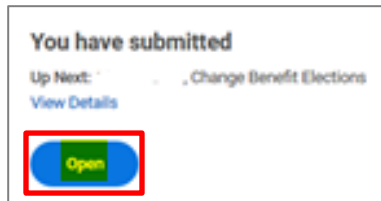


3. On the next page, select the Change Reason:
 - a) Select **TIAA Retirement Healthcare Savings Plan - Employee**.
 - b) Enter today's date for the **Benefit Event Date**.
 - c) Click **Submit**.



4. A pop-up window will appear stating you have submitted.

Click **Open**.

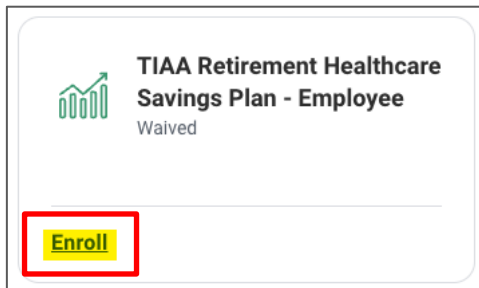


5. On the next page, click **Let's Get Started**.

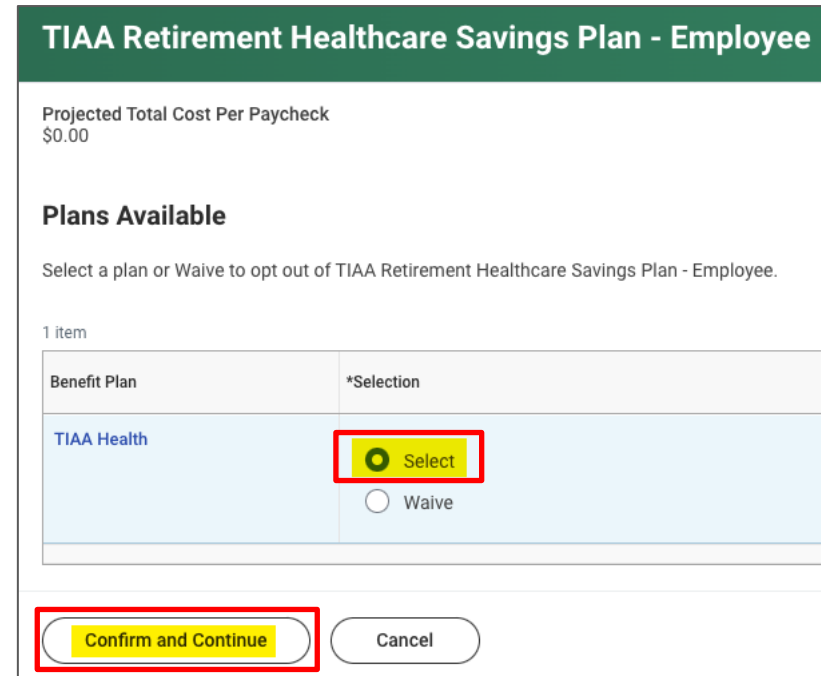


(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Change - TIAA Retirement Healthcare Savings Plan - Employee** message and then **Let's Get Started**.)

6. On the page with the Benefits cards, click **Enroll** under the **TIAA Retirement Healthcare Savings Plan - Employee** box.



7. Click **Select** and click **Confirm and Continue**.



8. On the next page, select either **Amount** or **Contribution** from the drop-down list.

Contribute
Enter how much you want to contribute as an amount or a percentage.

Contribution Type *

- select one
- Amount
- Percentage

Submit.

I Accept

9. Enter the per paycheck **contribution amount** (e.g. \$50.00) and click **Save**.

Contribute
Enter how much you want to contribute as an amount or a percentage.

Contribution Type *

Per Paycheck Contribution (\$)

Minimum Amount: \$0.50
Maximum Amount: \$50,000.00

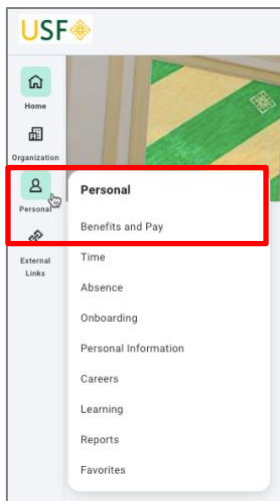
10. On the next page, click **Review and Sign**.

11. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click

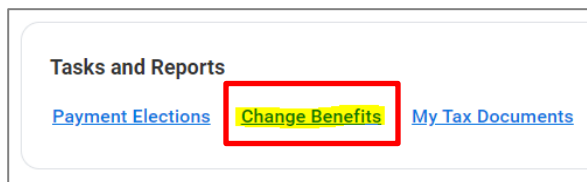
How to amend your employee contribution amount

Follow these steps:

1. Log in to USFWorks, click **Personal**, and then **Benefits and Pay**.



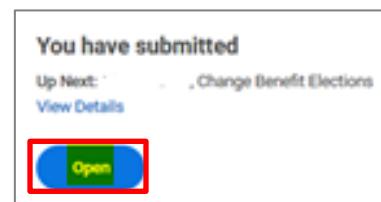
2. On the next page, under **Tasks and Reports**, select **Change Benefits**.



3. On the next page, select the Change Reason:
 - a) Select **TIAA Retirement Healthcare Savings Plan - Employee**.
 - b) Enter today's date for the **Benefit Event Date**.
 - c) Click **Submit**.

A screenshot of the 'Change Benefits' form. The 'Change Reason' section has several radio button options. The option 'TIAA Retirement Healthcare Savings Plan - Employee' is selected and highlighted with a red box. Below this, the 'Benefit Event Date' field is highlighted with a red box and contains the placeholder text 'MM/DD/YYYY'. At the bottom of the form, the 'Submit' button is highlighted with a red box. Other buttons include 'Save for Later' and 'Cancel'. There is also a text input field for 'enter your comment'.

4. A pop-up window will appear stating you have submitted. Click **Open**.



5. On the next page, click **Let's Get Started**.

TIAA Retirement Healthcare Savings Plan

Benefits: – Enroll In, Amend or Stop Employee Contribution

Faculty and Staff



Change Benefit Elections

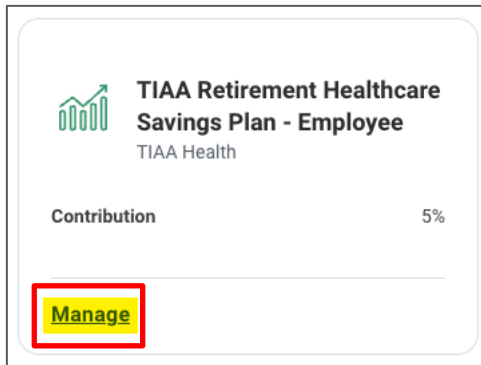
Initiated On 01/26/2023

Submit Elections By 10/30/2023

Let's Get Started

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Change - TIAA Retirement Healthcare Savings Plan - Employee** message and then **Let's Get Started**).

6. On the page with the Benefits cards, click **Manage** under the **TIAA Retirement Healthcare Savings Plan - Employee** box.

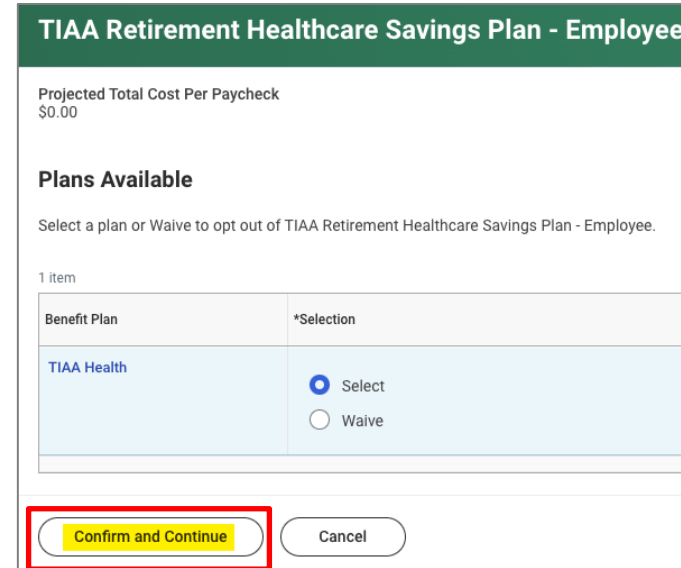


TIAA Retirement Healthcare Savings Plan - Employee
TIAA Health

Contribution 5%

Manage

7. Ensure that **Select** is still selected and click **Confirm and Continue**.



TIAA Retirement Healthcare Savings Plan - Employee

Projected Total Cost Per Paycheck
\$0.00

Plans Available

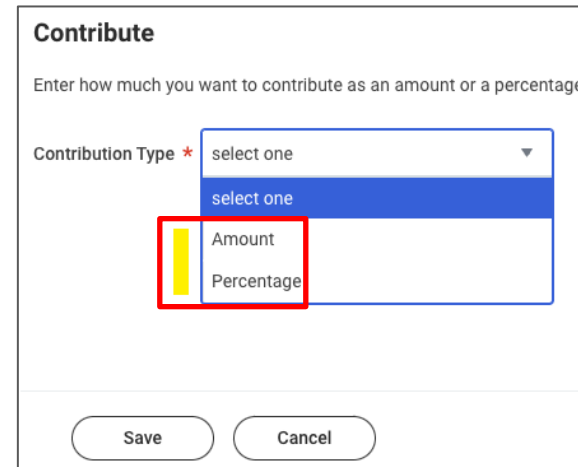
Select a plan or Waive to opt out of TIAA Retirement Healthcare Savings Plan - Employee.

1 item

Benefit Plan	*Selection
TIAA Health	<input checked="" type="radio"/> Select <input type="radio"/> Waive

Confirm and Continue Cancel

8. On the next page, select either **Amount** or **Contribution** from the drop-down list.



Contribute

Enter how much you want to contribute as an amount or a percentage.

Contribution Type * select one

Amount
Percentage

Save Cancel

9. Enter the per paycheck **contribution amount** (e.g. \$50.00) and click **Save**.

Contribute

Enter how much you want to contribute as an amount or a percentage.

Contribution Type * Amount

Per Paycheck Contribution (\$) 0.00

Minimum Amount: \$0.50

Maximum Amount: \$50,000.00

Save Cancel

10. On the next page, click **Review and Sign**.

Review and Sign Save for Later

11. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.

I Accept

Submit Cancel

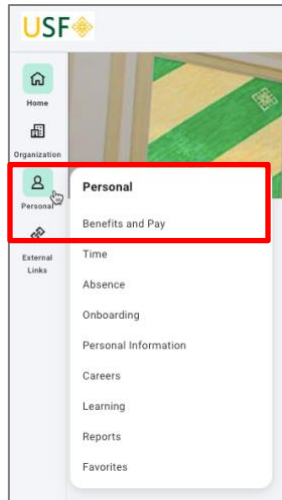
12. On the next page, click **Done**.

13. Your submission will be automatically routed to your HR Benefits partner for processing.

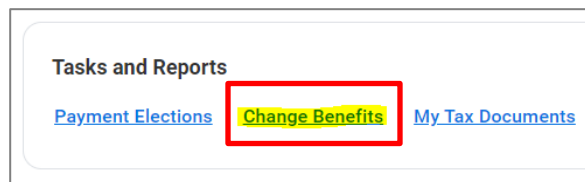
How to stop your employee contribution

Follow these steps:

1. Log in to USFWorks, click **Personal**, and then **Benefits and Pay**.



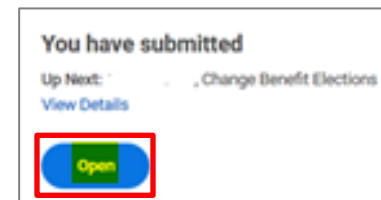
2. On the next page, under **Tasks and Reports**, select **Change Benefits**.



3. On the next page, select the Change Reason:
 - d) Select **TIAA Retirement Healthcare Savings Plan - Employee**.
 - e) Enter today's date for the **Benefit Event Date**.
 - f) Click **Submit**.

A screenshot of the 'Change Benefits' form. The 'Change Reason' section has several radio button options. The option 'TIAA Retirement Healthcare Savings Plan - Employee' is selected and highlighted with a red box. Below this, the 'Benefit Event Date' field is highlighted with a red box and contains the date 'MM/DD/YYYY'. At the bottom of the form, the 'Submit' button is highlighted with a red box. Other buttons include 'Save for Later' and 'Cancel'. There is also a text input field for 'enter your comment'.

4. A pop-up window will appear stating you have submitted. Click **Open**.



5. On the next page, click **Let's Get Started**.

TIAA Retirement Healthcare Savings Plan

Benefits: – Enroll In, Amend or Stop Employee Contribution

Faculty and Staff



Change Benefit Elections

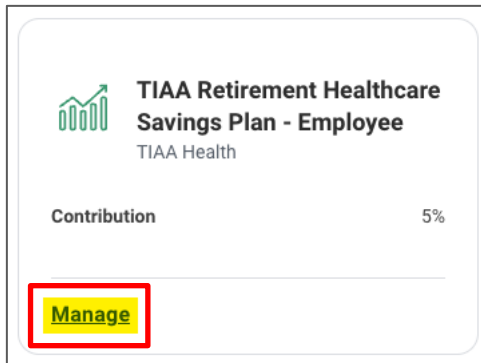
Initiated On 01/26/2023

Submit Elections By 10/30/2023

Let's Get Started

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Change - TIAA Retirement Healthcare Savings Plan - Employee** message and then on **Let's Get Started**).

- On the page with the Benefits cards, click **Manage** under the **TIAA Retirement Healthcare Savings Plan - Employee** box

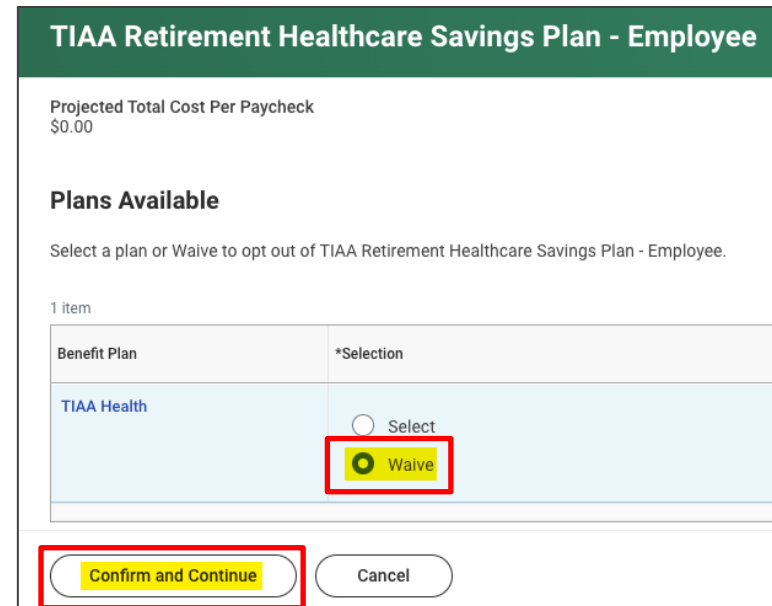


TIAA Retirement Healthcare Savings Plan - Employee
TIAA Health

Contribution 5%

Manage

- Select **Waive** and click **Confirm and Continue**.



TIAA Retirement Healthcare Savings Plan - Employee

Projected Total Cost Per Paycheck
\$0.00

Plans Available

Select a plan or Waive to opt out of TIAA Retirement Healthcare Savings Plan - Employee.

1 item

Benefit Plan	*Selection
TIAA Health	<input type="radio"/> Select <input checked="" type="radio"/> Waive

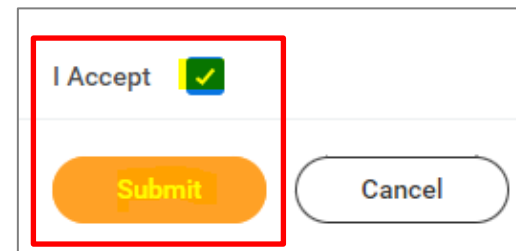
Confirm and Continue Cancel

- On the next page, click **Review and Sign**.



Review and Sign Save for Later

- On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.



I Accept

Submit Cancel

- On the next page, click **Done**.

- Your submission will be automatically routed to your HR Benefits partner for processing.

Benefits Team contact information

Please contact a USF Benefits Representative if you have further questions at benefits@usfca.edu or dial (415) 422-2442.

For inquiries concerning:

- a general HR issue, please email humanresources@usfca.edu
- leaves, please email leaves@usfca.edu
- payroll, please email payroll@usfca.edu
- retirement, please email retirementplan@usfca.edu
- Tuition Remission, please email tuitionremission@usfca.edu