Quick Reference Guide:

- Electing Employee Retirement Income Plan - Voluntary
- Electing or Changing Supplementary Retirement Program (SRP)

Log into Workday at [https://workday.uchicago.edu/](https://workday.uchicago.edu/) and locate the “Log in to Workday” link in the upper left side of the screen and follow the steps below.

1. Click on the Benefits Worklet.

2. Under the Change column, click on Benefits.

3. Under the Benefit Event Type area, select Retirement Plan Changes.
4. Use the **Calendar Icon** 📅 to select **today's date** as the Benefit Event Date. When making Employee Retirement Income Plan – Voluntary elections, please remember that your new election will be effective in your first July 2016 paycheck.

When making Supplementary Retirement Program (SRP) elections, please remember that your new election will be effective **the first day of the following month**.

5. Click on **Submit** to submit this task.

6. You will see the next task to complete. Click **Open**.

7. Scroll down to the Benefit Coverage Type: **Supplemental Retirement Plan**.

8. To contribute, enter a percentage amount in the **Employee Contribution – Percent** or enter a dollar amount in the **Employee Contribution - Amount (Monthly)** field as shown below.

   **Bi-weekly paid employees:** The amount you designate for SRP will be deducted each and every pay period. Please ignore the monthly indicator.

9. Enter your **SRP** contribution allocation in the **Employee Contribution Allocation** field(s).

   The total Employee Contribution Allocation must equal 100%.
10. Scroll down to the Benefit Coverage Type: **Employee Retirement Income Plan – Voluntary.**

11. Enter 1% or 2% in **Employee Contribution – Percent** field.

If you elect 1%, the University will contribute 2%. If you elect 2%, the University will contribute 4%.

![Benefit Coverage Type: Employee Retirement Income Plan - Voluntary](image1)

12. Enter your **ERIP – Voluntary** contribution allocation in the **Employee Contribution Allocation** field(s).

![Employee Contribution Allocation](image2)

The total Employee Contribution Allocation must equal 100%.

13. Click on the **Continue** button.

14. Review the **Electronic Signature** and click on the **Checkbox** to agree.

![Electronic Signature](image3)

15. Click **Submit** to submit your changes.

It is important that you print your confirmation statement for your records by selecting the print button. You do not need to return your signed confirmation.

16. This plan is effective July 1, 2016. If you are making changes prior to July 1 you will not see your Voluntary election in Workday unless you view future benefit elections.
To view future benefit elections:

Click on the **Benefits Worklet**

Under View, click on **Benefit Elections As of Date**

Enter 7/1/2016 in the **View as of** field

Click on the **OK** button.