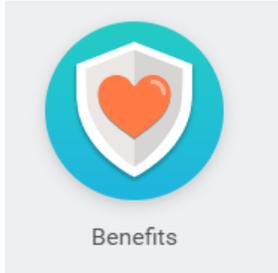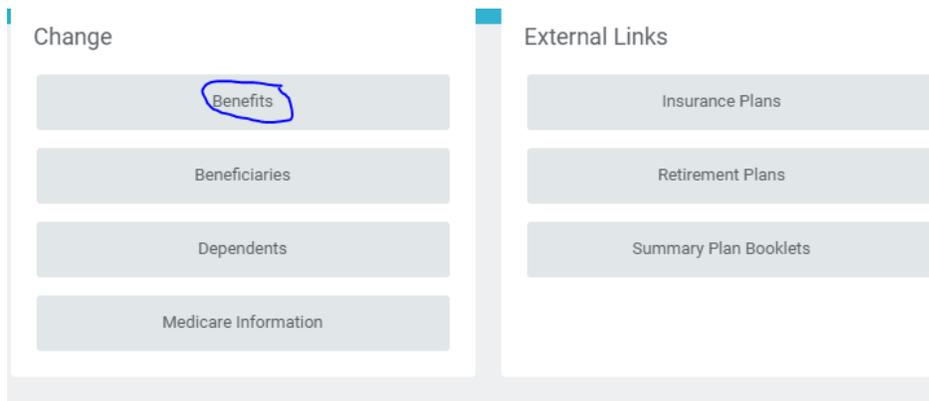# TDA ENTRY/UPDATE INSTRUCTIONS

Employee instructions for entering TDA Elections.

1. **Log into Workday**

2. **Click the Benefits Worklet**

3. **Select the Benefits option**

4. **Benefit Event Type - Choose "TDA Plan Change"**

5. **Benefit Event Date - Enter the current date.**

6. **Then Click Submit**

7. Choose OPEN

Change Benefit Elections
Due Date   12/23/2017

Open

> Details and Process

8. Retirement Savings Elections by Coverage Type

In this section, you will <u>choose</u> whether to have a specific dollar amount deducted or a percentage of your pay deducted and contributed to your TDA.

a. **Employee Contribution-Percent** – Enter the Percent of your pay you would like deducted and contributed to your TDA. If you chose this option, <u>leave the Employee Contribution-Amount box at zero</u>.

b. **Employee Contribution-Amount** – Enter the Monthly amount you would like to have deducted and contributed to your TDA. If you chose this option, <u>leave the Employee Contribution – Percent box at zero</u>.

==CAUTION**==**

1. You cannot chose both options. It has to be one or the other.
2. **DO NOT** put <u>100</u> in the Employee Contribution – Percent box. Doing so will cause your net pay to be ZERO ($0.00). You will NOT get a paycheck.

Retirement Savings Elections by Coverage Type

Benefit Coverage Type   Tax Deferred Account

Employee Contribution - Percent   0

Employee Contribution - Amount (Monthly)   0.00

12 items

9. Retirement Savings Elections Allocation

In this section, you will allocate your deduction to your Retirement vendor(s) by entering a percentage of the deduction that should go to each vendor in the "Employee

Contribution Allocation" box. The allocated percentage among vendors must equal 100% of the deduction.

a. **Benefit Plan** – In this column you will choose your Retirement Vendor
b. **Employee Contribution Allocation** – Enter the percentage of the deduction you want submitted to the vendor
c. **Calculated Contribution** – The total <u>Percent</u> or <u>Amount</u> in this column should equal the percent or amount entered in the Employee Contribution-Percent box or Employee Contribution-Amount box above.

Example: Vendor allocation for Employee Contribution-Percent of 20% - Here you can see that 50% of the 20% election will be distributed to the Fidelity Investment Roth account and 50% will be distributed to the Fidelity Investment Traditional account. Notice the total Percent in the Calculated Contribution column equals 20%, which equals the 20% entered in the Employee Contribution-Amount box.

Employee Contribution - Percent `20`

Employee Contribution - Amount (Monthly) `0.00`

12 items

Benefit Plan	Employee Contribution Allocation	Calculated Contribution	Provider Website
Tax Deferred Account - Fidelity Investments Roth	50	Percent 10 Amount (Monthly) $0.00	Fidelity
Tax Deferred Account - Fidelity Investments Traditional	50	Percent 10 Amount (Monthly) $0.00	Fidelity

Example: Vendor allocation for Employee Contribution-Amount of $100 - Here you can see that 50% of the $100 election will be distributed to the Fidelity Investment Roth account and 50% will be distributed to the Fidelity Investment Traditional account. Notice the total Amount in the Calculated Contribution column equals $100 which equals the $100 entered in the Employee Contribution-Amount box.

Employee Contribution - Amount (Monthly) `100.00`

12 items

Benefit Plan	Employee Contribution Allocation	Calculated Contribution	Provider Website
Tax Deferred Account - Fidelity Investments Roth	50	Percent 0 Amount (Monthly) $50.00	Fidelity
Tax Deferred Account - Fidelity Investments Traditional	50	Percent 0 Amount (Monthly) $50.00	Fidelity
Tax Deferred Account - Lincoln Financial Group Roth	0	Percent 0 Amount (Monthly) $0.00	Lincoln Financial

TDA ENTRY/UPDATE INSTRUCTIONS

10. **Click Continue – You will be taken to the final confirmation page.**

    a. **Election Coverages section - Review the elections made.**
    b. **Attachments section – Drop or upload attachments if needed.**
    c. **Electronic Signature section – Read the statements listed and check the "I Agree" box to certify that you have read, understood and agree to the terms listed. Then list any comments you may have in the box below.**

11. **Click Submit**

12. **Click Done**

You have now completed your TDA Election set-up.