

Enrolling in Your 403(b) Plan

Choose an option below:

[Enroll, Change or Stop Contributions](#)

[Use the Maximum Calculation Modeling Tool](#)



EMORY
UNIVERSITY



Human Resources System

Step 1: Log on to Self-Service at <http://leo.cc.emory.edu>.

Network ID

Password Login

University Employees: [Forget Password?](#)
Healthcare Employees: [Forget Password?](#)
[Other Issues logging in?](#)

Personalize [Content](#) | [Layout](#)

Menu

Search:

- ▷ My Favorites
- ▷ Self Service

Step 2: Click on Self Service to expand your available selections.

NEXT

Main Menu >

Self Service

Navigate to your self service information and activities.

<p>MyEmory Make a contribution to the MyEmory employee campaign. You may designate your gift to the area of your choice. Funds include all Emory schools, units, and special initiatives such as the Emory University Hardship Fund.</p>	<p>Careers View current career postings and if interested, apply for position(s).</p>	<p>Emory Community Giving Make a contribution to Emory Community Giving.</p>
<p>Emory Emergency Notify System Emory Emergency Notify System</p>	<p>Emory Learning Management Sys Access Emory University's Learning Management System to browse course offerings, register for courses, view your learning transcript and more.</p>	<p>FMLA and Medical Leave Submit and review requests for FMLA or medical leave. Access and print the FMLA Health Care Provider Certification form.</p>
<p>Personal Information Review and update your personal information. Personal Information Summary</p>	<p>Payroll and Compensation Review your pay and compensation history. Update your direct deposit and other deduction or contribution information. View Paycheck Geocode Data Direct Deposit</p>	<p>Benefits Review health, insurance, savings or other benefits information. Review and update dependent and beneficiary personal information. Education Benefit Program Family Status Change Spouse or SSDP Certification 3 More...</p>

Step 3: Select the Benefits tab.

Main Menu > Self Service >

Benefits

Review health, insurance, savings or

<p>Education Benefit Program Emory University employees may receive scholarship benefits for themselves and a qualified spouse/same-sex domestic partner or child.</p>	<p>Benefits Enrollment Benefits Enrollment event for qualified Family Status Changes (FSC). Enroll in benefits.</p>	<p>Spouse or SSDP Certification You may view your current certification status here. Select the Benefits Enrollment link to certify current New Hire, Rehire, or Annual Enrollment events.</p>
<p>Benefits Summary Review a summary of current, past or future benefit enrollments.</p>	<p>403(b) Savings Plan Election Enroll, change or stop contributions to eligible Savings Plans. You may also use the Maximum Calculation Model to determine the percent you need to contribute to reach the IRS limit.</p>	

Step 4: Select 403(b) Savings Plan Election



Step 5: Choose “Click here to enroll, change or stop 403(b) elections”

This site is intended to enroll, change or stop 403(b) elections in the Emory University, Emory Healthcare or Wesley Woods 403(b) Savings Plans only.

Please select the plan you wish to access at this time and click one of the process buttons below to start.

Select	Company	Job Code	Job Description	403B Plan
<input checked="" type="checkbox"/>	EUV	Emory University	---	EUV

If you have multiple eligible positions within the same Company and Plan, elections entered on one position will be applied to the others. You will not be able to select a position which is ineligible for one of these plans even though it may be displayed above. You may be eligible under multiple plans. After you complete enrollment for the plan selected, re-enter this site from Employee Self Service to make elections for other plans.

[Click here to enroll, change or stop 403\(b\) elections](#)

[Click here to model 403\(b\) maximum contributions](#)



Step 6: Choose “Begin Enrollment”

403(b) Authorization

Savings Plan Elections

You may use this site to enroll, change or stop contributions to the Emory University Retirement Plan (the "Plan"). Changes will be effective on your next paycheck if you Submit elections prior to the payroll processing date. If submission is after the payroll processes, your changes will be effective the following paycheck.

[Begin Enrollment](#)

[Exit](#)



Your Current Contributions:

<u>Effective Date</u>	<u>403(b) Savings Plan Contributions</u>	<u>Employee Pre-Tax %</u>	<u>Employee After-Tax %</u>	<u>Employer Match</u>	<u>Employer Basic</u>
02/22/2010	Matched 403(b) Basic TIAA-CREF				
02/22/2010	3% TIAA-CREF Match				
02/22/2010	Employer Basic TIAA-CREF				

For information about the 403(b) plan and vendors, review the [403\(b\) Plan Document](#) or [Your Options](#) brochure. For more information about investment options available, please contact [Fidelity](#) (800-343-0860), [TIAA-CREF](#) (800-842-2252) or [Vanguard](#) (800-523-1188).

Emory University Matching Contributions

We encourage eligible employees to contribute to the 403(b) plan and take advantage of the employer matching contributions. Emory University matches the contributions of employees 21 years of age and older with one year of eligible service. The Plan matches your first 1% or 2% in contributions at 150%. If you contribute 1% of your salary, Emory University will match and contribute 1.5% on your behalf. If you contribute 2% of your salary, Emory University will match and contribute 3% on your behalf.

If you have current contributions, they will be listed for your information.



Make Your Elections:

Enter the total percent you wish to contribute from YOUR regular salary and click the Apply button.
To stop ALL your contributions, enter 0 for YOUR Total Contribution %.

YOUR Total Contribution [Apply](#)
%
(Contribution must be between 0% - 100%)

Step 7: Once you have determined your contribution percentage, enter the amount in the field, "**YOUR Total Contribution,**" then click "**Apply.**"

Of YOUR Total Contribution Percentage entered above, the first 2% is your Employee Basic contribution. You will receive an Emory University Employer Match of 3% based on your Employee Basic contribution.

Based upon YOUR Total Contribution Percentage entered above, the remaining 0% will be your Employee Supplemental contribution.

In addition, you are eligible to receive the Emory University Employer Basic contribution of 6%.

To stop only your SUPPLEMENTAL contributions and continue your Employee Basic Contributions, enter 1% or 2% in YOUR Total Contribution %.

Click here if
you contribute
more than 2%.

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Vendor Selection:

Please select your vendor below. You may choose different vendors for your contribution, the employer match and the employer contribution. Please specify if your contribution should be Pretax or a Roth contribution.

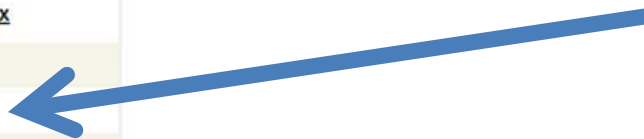
Note: After Tax contributions (other than Roth) are not allowed for those who have a salary of \$110,000.00 or higher.

Plan Type	Election Percentage	Pretax	Roth	AfterTax	Basic Vendor Employee
403(b) Basic	2.000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fidelity
ER 403b Basic	6.000				Fidelity
ER 403b Match	3.000				Fidelity

Step 7a: If you contribute more than 2%, those contributions are supplemental. Here you can select which vendor(s) and plan(s) you wish to direct your supplemental contributions.

Employee Supplemental contributions may be split across vendors. Use the boxes below to elect the percent you would like to invest with a given vendor. You may select between Pretax or Roth contribution options. After-Tax contributions (other than Roth) are not allowed for those who have a salary of \$110,000 or higher.

Plan Type	Election Percentage	Pretax	AfterTax
Fidelity	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
TIAA-CREF	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
SRA TIAA-CREF	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vanguard	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppl 403(b) Roth Fidelity	<input type="text"/>		
Suppl 403(b) Roth TIAA-CREF	<input type="text"/>		
Suppl 403(b) Roth SRA TIAA	<input type="text"/>		
Suppl 403(b) Roth Vanguard	<input type="text"/>		



Entered Supplemental % 0.000 should equal Suppl Total % 8.000

Based upon your total contributions entered above, your Employee Supplemental Contributions must equal 8%. Please make sure the percentages you've entered total

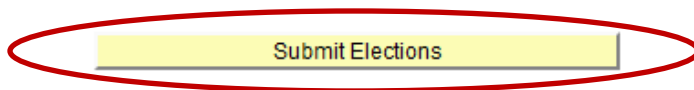


Authorization for Payroll Deduction

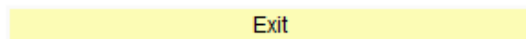
I have had the opportunity to review a copy of the Emory University Retirement Plan Summary Plan Description and have access to the Plan's vendors to request and receive investment prospectus on the funds and annuity contracts available for investment through the Plan. I understand that investment elections I make must be made directly with the Plan's vendors (Fidelity, Vanguard and TIAA-CREF) and that, if I do not actively make an election, the Plan does have default investment elections selected, in which my funds will then be invested.

I hereby revoke all previous contribution elections made by me and elect to make Voluntary Contributions from my Regular Salary in the amount that I have entered above (but in no event more than the legal limit under the Internal Revenue Code). I understand that I can terminate or change my contributions at any time. This authorization will be effective for my Regular Salary paid to me on or after the date that I have submitted this election to Emory or the first day of the pay cycle following receipt of this election, and will remain in effect until I again elect a new voluntary contribution election or cease my participation in the Plan.

I acknowledge and agree that I am fully and completely responsible for making sure that the amount of my contributions for any calendar year, including contributions made under the Emory University Plan or another employer's plan, will not exceed the legal limit under the Internal Revenue Code and that Emory University has no duty or obligation to do that for me. I also acknowledge and agree that Emory University has the right to reduce the contributions I have elected to make or stop them entirely if it determines (whether through an audit or otherwise) that the legal limit has been or will be reached.



By clicking "Submit Elections" I am agreeing to have my pay reduced by the election amounts I indicated above. I understand that these changes will be effective on my next paycheck if I have submitted elections prior to the payroll processing date. If my submission is after the payroll processes, my changes will be effective the following paycheck.



By clicking "Exit" I understand that my elections above will not be recorded and I will exit the 403(b) enrollment site.

Step 8: After selecting your elections, click the "Submit Elections" button.

Print a copy of this page for your records.

**RETURN TO
SELF SERVICE**

**MAXIMIZE YOUR
CONTRIBUTION**

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Healthcare Employees: [Forget Password?](#)
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<p>Emory Emergency Notify System Emory Emergency Notify System</p>	<p>Emory Learning Management Sys Access Emory University's Learning Management System to browse course offerings, register for courses, view your learning transcript and more.</p>	<p>FMLA and Medical Leave Submit and review requests for FMLA or medical leave. Access and print the FMLA Health Care Provider Certification form.</p>
<p>Personal Information Review and update your personal information. Personal Information Summary</p>	<p>Payroll and Compensation Review your pay and compensation history. Update your direct deposit and other deduction or contribution information. View Paycheck Geocode Data Direct Deposit</p>	<p>Benefits Review health, insurance, savings or other benefits information. Review and update dependent and beneficiary personal information. Education Benefit Program Family Status Change Spouse or SSDP Certification 3 More...</p>

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<p>Benefits Summary Review a summary of current, past or future benefit enrollments.</p>	<p>Benefits Enrollment Enroll in benefits.</p>	<p>403(b) Savings Plan Election Enroll, change or stop contributions to eligible Savings Plans. You may also use the Maximum Calculation Model to determine the percent you need to contribute to reach the IRS limit.</p>

Step 4: Select 403(b) Savings Plan Election



403(b) Savings Plan Election

This site is intended to enroll, change or stop 403(b) elections in the Emory University, Emory Healthcare or Wesley Woods 403(b) Savings Plans only.

Please select the plan you wish to access at this time and click one of the process buttons below to start.

Select	Company	Job Code	Job Description	403B Plan
<input checked="" type="checkbox"/>	EUV	Emory University		EUV

Choose "Click here to model 403(b) maximum contributions"

If you have multiple eligible positions within the same Company and Plan, elections entered on one position will be applied to the others. You will not be able to select a position which is ineligible for one of these plans even though it may be displayed above. You may be eligible under multiple plans. After you complete enrollment for the plan selected, re-enter this site from Employee Self Service to make elections for other plans.

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[Click here to model 403\(b\) maximum contributions](#)

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Once in the tool, your current elected contribution percentages are displayed.

As a participant in the Emory University Retirement Plan, you determine the amount you contribute to the plan. This tool has been created to assist you in estimating the maximum amount that you may contribute to the plan based on IRS requirements. This calculation tool assumes you are making such contributions only to the Emory University Retirement Plan from your Emory University earnings. If you make contributions to another qualified retirement plan during the year, even a plan sponsored by an affiliate of Emory University, you are responsible for making sure your contributions do not exceed the annual maximum.

Your current election is:

Employee Basic

Employee Supplemental

Total % you are currently contributing

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Step 1

Anticipated Base Salary Current Year

If you were hired after January 1st, calculations are prorated based on your annual base salary and the number of pay periods remaining in the calendar year.

Additional earnings (i.e. shift differential, summer research teaching) or changes to your pay may cause a difference in actual earnings versus anticipated salary. You should adjust the salary above to account for those changes. Generally bonuses and overtime pay are not eligible.

Step 2

Actual YTD 403(b) Eligible Earnings

This is your year-to-date eligible earnings and cannot be adjusted.

Step 3

Maximum Allowed Contribution

This amount is based upon your age and cannot be adjusted.

Step 4

YTD 403 (b) Contributions under this plan

You should adjust this amount if you have contributed to another 403(b) or 401(k) plan during this calendar year.

Step 5

[Update Estimate](#)

Percent to Maximize your Contribution

Note: If your Actual YTD Earnings exceed your Anticipated Base Salary you should change the Base Salary in Step 1 and click Update Estimate. If your YTD 403(b) Contributions already meet the Maximum Allowed no further action is necessary for this calendar year.

Anticipated Annual Salary (Step 1):
This is your current anticipated salary. If there is a change due to salary increases, summer research teaching, or other circumstances, this field can be adjusted. Use caution when adjusting this number.

Note: Overtime and Bonuses are generally not to be included.



Step 1

Anticipated Base Salary Current Year

If you were hired after January 1st, calculations are prorated based on your annual base salary and the number of pay periods remaining in the calendar year.

Additional earnings (i.e. shift differential, summer research teaching) or changes to your pay may cause a difference in actual earnings versus anticipated salary. You should adjust the salary above to account for those changes. Generally bonus and overtime pay are not eligible.

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Actual YTD 403(b) Eligible Earnings

This is your year-to-date eligible earnings and cannot be adjusted.

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This amount is based upon your age and cannot be adjusted.

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You should adjust this amount if you have contributed to another 403(b) or 401(k) plan during this calendar year.

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Percent to Maximize your Contribution

Note: If your Actual YTD Earnings exceed your Anticipated Base Salary you should change the Base Salary in Step 1 and click Update Estimate. If your YTD 403(b) Contributions already meet the Maximum Allowed no further action is necessary for this calendar year.

Year To Date Earnings (Step 2): This is the salary that you have received for the year so far that is 403(b) eligible. This number cannot be adjusted.



Step 1

Anticipated Base Salary Current Year

If you were hired after January 1st, calculations are prorated based on your annual base salary and the number of pay periods remaining in the calendar year.

Additional earnings (i.e. shift differential, summer research teaching) or changes to your pay may cause a difference in actual earnings versus anticipated salary. You should adjust the salary above to account for those changes. Generally bonus and overtime pay are not eligible.

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Actual YTD 403(b) Eligible Earnings

This is your year-to-date eligible earnings and cannot be adjusted.

Step 3

Maximum Allowed Contribution

This amount is based upon your age and cannot be adjusted.

Step 4

YTD 403 (b) Contributions under this plan

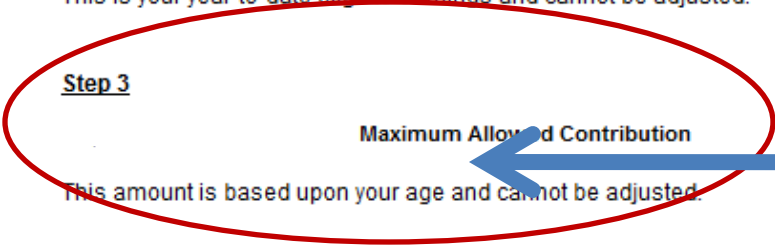
You should adjust this amount if you have contributed to another 403(b) or 401(k) plan during this calendar year.

Step 5

Percent to Maximize your Contribution

Note: If your Actual YTD Earnings exceed your Anticipated Base Salary you should change the Base Salary in Step 1 and click Update Estimate. If your YTD 403(b) Contributions already meet the Maximum Allowed no further action is necessary for this calendar year.

IRS Maximum Allowed (Step 3):
This is the amount that the IRS allows you to contribute according to your age. This number cannot be adjusted.



Step 1

Anticipated Base Salary Current Year

If you were hired after January 1st, calculations are prorated based on your annual base salary and the number of pay periods remaining in the calendar year.

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Step 2

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This is your year-to-date eligible earnings and cannot be adjusted.

Step 3

Maximum Allowed Contribution

This amount is based upon your age and cannot be adjusted.

Step 4

YTD 403 (b) Contributions under this plan

You should adjust this amount if you have contributed to another 403(b) or 401(k) plan during this calendar year.

Step 5

Update Estimate

Percent to Maximize your Contribution

Note: If your Actual YTD Earnings exceed your Anticipated Base Salary you should change the Base Salary in Step 1 and click Update Estimate. If your YTD 403(b) Contributions already meet the Maximum Allowed no further action is necessary for this calendar year.

YTD 403(b) Contributions Under This Plan (Step 4): This amount is what you have contributed to your Emory 403(b) Savings Plan so far for the year.

Note: If you are contributing or have contributed to another 403(b) or 401(k) plan, you will need to adjust this number to account for those contribution amounts as this will impact your maximum contribution percentage.



Step 1

Anticipated Base Salary Current Year

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This is your year-to-date eligible earnings and cannot be adjusted.

Step 3

Maximum Allowed Contribution

This amount is based upon your age and cannot be adjusted.

Step 4

YTD 403 (b) Contributions under this plan

You should adjust this amount if you have contributed to another 403(b) or 401(k) plan during this calendar year.

Step 5

Percent to Maximize your Contribution

Note: If your Actual YTD Earnings exceed your Anticipated Base Salary you should change the Base Salary in Step 1 and click Update Estimate. If your YTD 403(b) Contributions already meet the Maximum Allowed no further action is necessary for this calendar year.

Percent to Maximize Your Contributions (Step 5): The percentage amount listed is what you can contribute to the 403(b) plan to reach the yearly IRS limit. However, if you added a new dollar amount in Step 1 and/or Step 4, click the **Update Estimate** button to recalculate the percentage amount.

Note: The first 2% of this amount is your employee basic contribution and the remainder will be your supplemental contribution.



Making your election:

If you wish to maximize your contributions, click the link at the bottom of this page to access the 403(b) Savings Plans Elections page and enter the Percent to Maximize your Contributions shown above.

Changes to your Pay Mid-Year

In the event your annual base salary changes during the plan year, you should revisit this site and use the tool to recalculate your MAXIMUM ALLOWED CONTRIBUTION for the year.

Disclaimer

This Maximum Calculation Tool provides information for **PLANNING PURPOSES ONLY** and will not automatically update your 403b plan election(s).

In order for this tool to perform the calculation, data contained within your employee record is utilized and is assumed to be current and accurate (i.e., date of birth, annual base salary, etc.). Emory is not liable for any calculation errors due to erroneous information in your employee record or any other issue and encourages you to review your information and the plan details before making any elections and/or changes. Emory reserves the right to modify or terminate the 403(b) Savings Plan in accordance with the plan document and to update or discontinue use of this Maximum Calculation Tool.

If the calculation results in an incorrect **MAXIMUM ALLOWED CONTRIBUTION** determination, the plan document limitation provisions and statutory limits control your actual contribution limit. If you reach your **MAXIMUM ALLOWED CONTRIBUTION** through the 403(b) Savings Plan, your contributions will automatically stop and will automatically resume at the beginning of the next calendar year. If you are eligible and would like to change your contributions to after-tax contributions, you must go to Employee Self-Service to access the 403(b) Savings Plan Elections and make an election to contribute on an after-tax basis.

Use your browser's **Print** option to print a copy of this page for your records.

2011-03-01

[Return to 403\(b\) Self Service Page](#)

Once you have determined the maximum contribution percentage and you wish to maximize your contributions, click ***Return to 403(b) Self Service Page*** at the bottom of the page to access the 403(b) Savings Plans Elections page.

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Choose "Begin Enrollment"

403(b) Authorization

Savings Plan Elections

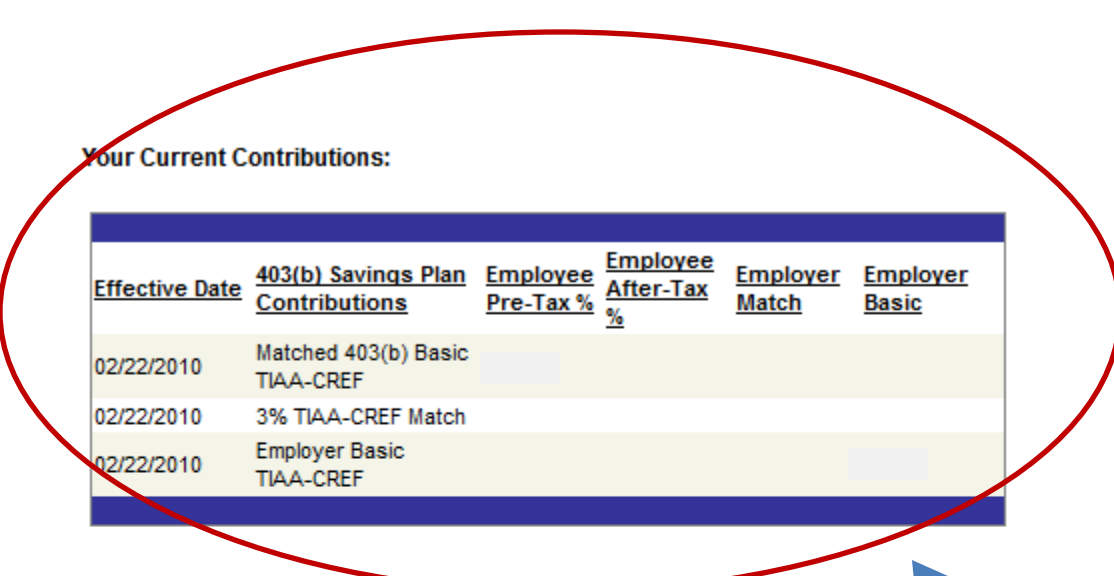
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[Begin Enrollment](#)

[Exit](#)



Your Current Contributions:

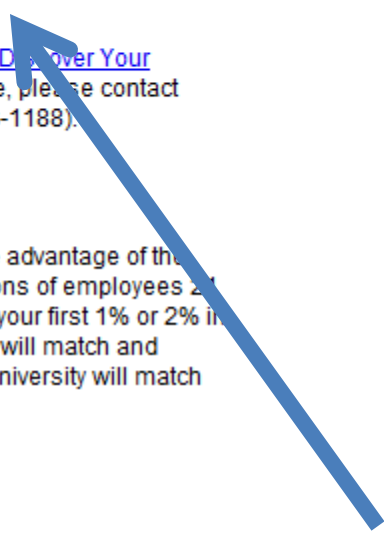


<u>Effective Date</u>	<u>403(b) Savings Plan Contributions</u>	<u>Employee Pre-Tax %</u>	<u>Employee After-Tax %</u>	<u>Employer Match</u>	<u>Employer Basic</u>
02/22/2010	Matched 403(b) Basic TIAA-CREF				
02/22/2010	3% TIAA-CREF Match				
02/22/2010	Employer Basic TIAA-CREF				

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Enter the total percent you wish to contribute from YOUR regular salary and click the Apply button.
To stop ALL your contributions, enter 0 for YOUR Total Contribution %.

YOUR Total Contribution
%
(Contribution must be between 0% - 100%)

Of YOUR Total Contribution Percentage entered above, the first 9% is your Employee Basic contribution. You will receive an Emory University Employer Match of 3% based on your Employee Basic contribution.

Based upon YOUR Total Contribution Percentage entered above, the remaining 0% will be your Employee Supplemental contribution.

In addition, you are eligible to receive the Emory University Employer Basic contribution of 6%

To stop only your SUPPLEMENTAL contributions and continue your Employee Basic Contributions, enter 1% or 2% in YOUR Total Contribution %.

Once you have determined the maximum contribution percentage and you wish to maximize your contributions, enter the new percentage amount in the field, ***“YOUR Total Contribution,”*** then click ***“Apply.”***

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Click here if you contribute more than 2%.

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Please select your vendor below. You may choose different vendors for your contribution, the employer match and the employer contribution. Please specify if your contribution should be Pretax or a Roth contribution.

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Vanguard	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppl 403(b) Roth Fidelity	<input type="text"/>		
Suppl 403(b) Roth TIAA-CREF	<input type="text"/>		
Suppl 403(b) Roth SRA TIAA	<input type="text"/>		
Suppl 403(b) Roth Vanguard	<input type="text"/>		



Entered Supplemental % 0.000 should equal Suppl Total % 8.000

Based upon your total contributions entered above, your Employee Supplemental Contributions must equal 8%. Please make sure the percentages you've entered total

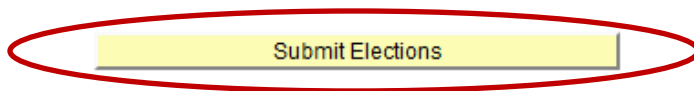


Authorization for Payroll Deduction

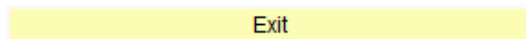
I have had the opportunity to review a copy of the Emory University Retirement Plan Summary Plan Description and have access to the Plan's vendors to request and receive investment prospectus on the funds and annuity contracts available for investment through the Plan. I understand that investment elections I make must be made directly with the Plan's vendors (Fidelity, Vanguard and TIAA-CREF) and that, if I do not actively make an election, the Plan does have default investment elections selected, in which my funds will then be invested.

I hereby revoke all previous contribution elections made by me and elect to make Voluntary Contributions from my Regular Salary in the amount that I have entered above (but in no event more than the legal limit under the Internal Revenue Code). I understand that I can terminate or change my contributions at any time. This authorization will be effective for my Regular Salary paid to me on or after the date that I have submitted this election to Emory or the first day of the pay cycle following receipt of this election, and will remain in effect until I again elect a new voluntary contribution election or cease my participation in the Plan.

I acknowledge and agree that I am fully and completely responsible for making sure that the amount of my contributions for any calendar year, including contributions made under the Emory University Plan or another employer's plan, will not exceed the legal limit under the Internal Revenue Code and that Emory University has no duty or obligation to do that for me. I also acknowledge and agree that Emory University has the right to reduce the contributions I have elected to make or stop them entirely if it determines (whether through an audit or otherwise) that the legal limit has been or will be reached.



By clicking "Submit Elections" I am agreeing to have my pay reduced by the election amounts I indicated above. I understand that these changes will be effective on my next paycheck if I have submitted elections prior to the payroll processing date. If my submission is after the payroll processes, my changes will be effective the following paycheck.



By clicking "Exit" I understand that my elections above will not be recorded and I will exit the 403(b) enrollment site.

After selecting your elections, click the **"Submit Elections"** button.

Print a copy of this page for your records.

**RETURN TO
SELF SERVICE**