

Overview

This Quick Reference Guide (QRG) describes how to join the Retirement Savings Plan or how to change your current Retirement Savings contribution rate.

You may voluntarily join the Retirement Savings Plan or you can be automatically enrolled into the scheme provided you are an eligible team member. You can also change your contribution rates at any time. If you wish to opt out, you can do so via Aviva, our retirement saving plan provider, you cannot opt out via Workday. To find out more, please visit our [Retirement Savings](#) page.

Need to Know Before Starting!

Your Retirement Savings changes will be applicable from the 1st of the month following your change request.

Join Retirement Savings Scheme


1. Click **Benefits** on your Home Page.
2. Click on **Benefits**.



Change	External Links
Benefits	Discounted Personal Training
Beneficiaries	My Benefits - Nuffield Intranet
Dependents	



3. Click **Join Retirement Savings Scheme**.

Benefit Event Type	<input type="radio"/> Add / Change my Gym Membership
	<input type="radio"/> Change my Healthcare (Qualifying Life Event only)
	<input type="radio"/> Change My Retirement Savings Contributions
	<input checked="" type="radio"/> Join Retirement Savings Scheme



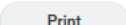
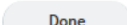
4. Click on **Benefit Event Date** calendar icon  and select today's or future date. The contribution rate change will apply from the 1st of the following month.

Note

An error box will appear if you are already enrolled in a Retirement Saving Plan. You will need to revise and select **Change My Retirement Savings Contributions** to make changes to your contributions.

5. You do not need to provide any supporting documentation for joining the Retirement Savings Plan.
6. Click **Submit**. 
7. Click **Open**. 
8. Select **Elect** and complete **Employee Contribution** by typing in the **Percent** you wish to contribute.

*Elect / Waive	Employee Contribution
<input checked="" type="radio"/> Elect	Percent
<input type="radio"/> Waive	<input type="text" value="2.5"/>

9. Click **Continue**. 
10. Click **Submit**. 
11. Select **Print** to launch a printable version of this summary for your records or click **Done**.  

Note

The default contribution rate is set to 2.5%, in line with the current Auto Enrolment rate, however you can increase or decrease this depending on your preference.

You will be automatically enrolled onto a pension scheme if you meet the Auto Enrolment criteria.

Change My Retirement Savings Contributions

1. Click **Benefits** on your Home Page.
2. Click on **Benefits**.



Change

Benefits

Beneficiaries

Dependents

External Links

Discounted Personal Training

My Benefits - Nuffield Intranet

3. Click on **Change My Retirement Savings Contributions**. Employees enrolled in the Retirement Savings AE Plan - Aviva should select 'Waive Auto Enrolment / Join Retirement Savings Plan'.

Benefit Event Type

★ ☐ Add / Change my Gym Membership

☐ Change my Healthcare (Qualifying Life Event only)

☐ Change My Retirement Savings Contributions

☐ Join/Change Retirement Savings (Bank)

☐ Join Retirement Savings Scheme



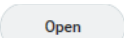
☒ Waive Auto Enrolment/Join Retirement Savings

Benefit Event Date

★ DD / MM / YYYY

Note



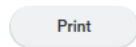
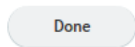
An error box will appear if you are not enrolled in a Retirement Saving Plan. You will need to revise and select **Join Retirement Saving Scheme** to make your selection.

4. Click on **Benefit Event Date** calendar icon  and select today's or future date. The contribution rate change will apply from the 1st of the following month.
5. Click **Submit**. 
6. Click **Open**. 


7. Under **Employee Contribution**, type in the **Percent** you wish to contribute.

Employees enrolled in the **Retirement Savings AE Plan - Aviva** should 'Waive' out of this arrangement prior to opting to 'Elect' Retirement Savings Plan, and a contribution rate.

Retirement Savings Elections 2 items		
Benefit Plan	*Elect / Waive	Employee Contribution
Retirement Savings Plan - Aviva	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="4"/>
Retirement Savings AE Plan - Aviva	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent <input type="text" value="0"/>

8. Click **Continue / Submit**  
9. Select **Print** to launch a printable version of this summary for your records or click **Done**.  

View My Retirement Savings Contributions

1. Click **Benefits** on your Home Page. 
2. Under View, click on **All Benefits Elections (As of Date)**

View

All Benefit Elections (As of Date)

3. The Effective date always defaults to the current date, simply change it to the 1st of the following month or later to see your changes to benefits made this month:

Effective as of Date

01 / 11 / 2018 