

Job Aid Content

[Information](#)
[Instructions](#)
[Resources](#)

Information

This job aid provides the steps to follow after receiving the email notification indicating that you must make a mandatory retirement plan election.

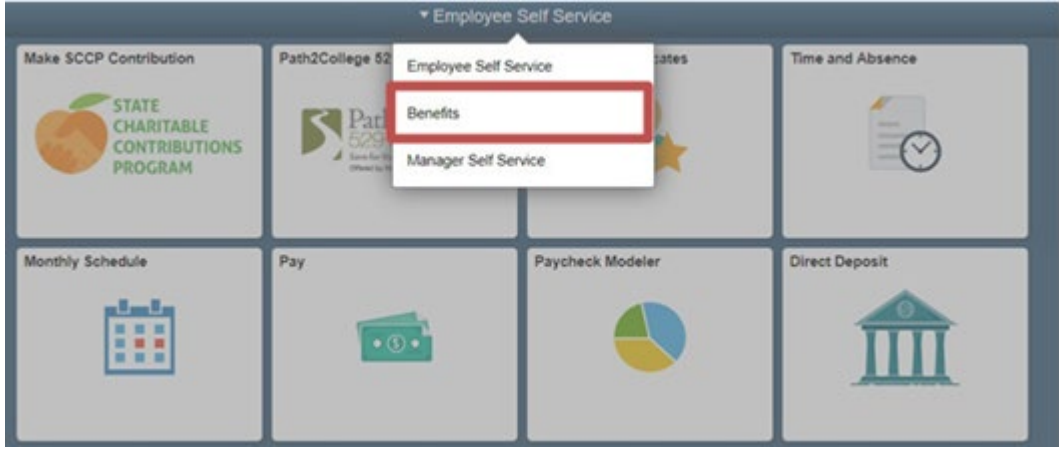
Note: Your mandatory plan election must be made within 60 days of your hire date, or you will default to TRS.

Note: Choose carefully! Please be informed that your retirement plan choice is irrevocable during your University System of Georgia employment. This selection is permanent.

Source: OneUSG Connect Knowledge base:

https://usg.service-now.com/usgsp?id=kb_article&sys_id=b3a5c1601bb534d01d662f4a234bcb9a

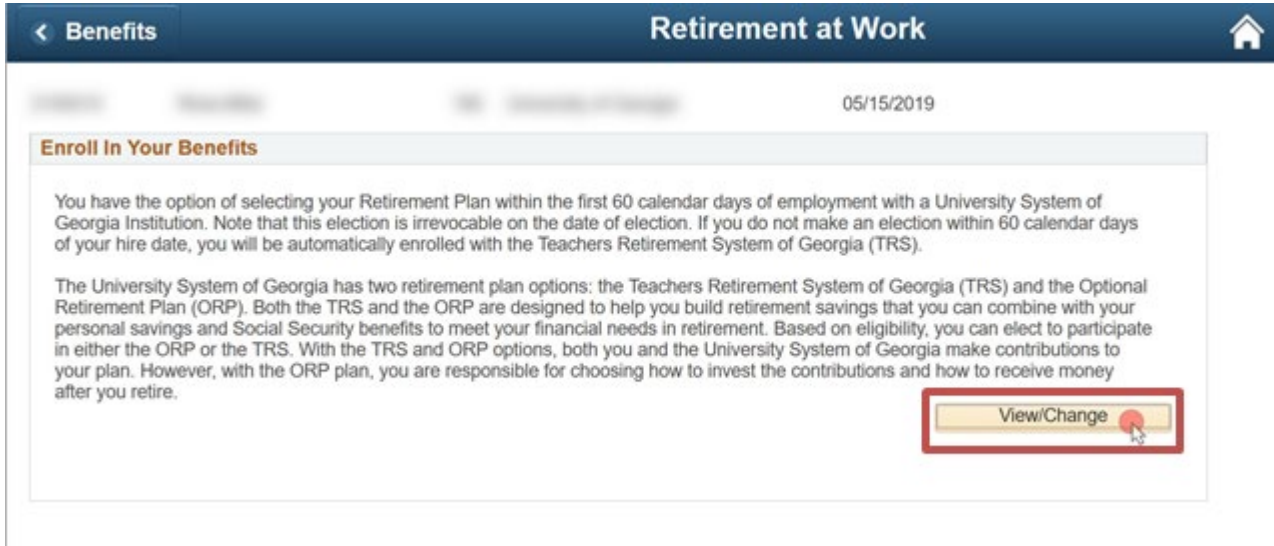
Instructions

| | |
|----|---|
| | |
| 1. | Log into OneUSG Connect. |
| 2. |  |
| 3. | <p>From Benefits, click the MANDATORY Retirement Election file.</p> <p>NOTE: These files will only be displayed if you have an open election window. The files will be removed from your Self Service the day after you complete your election.</p> |



4.

After reading the information provided, Click the **View/Change** button.



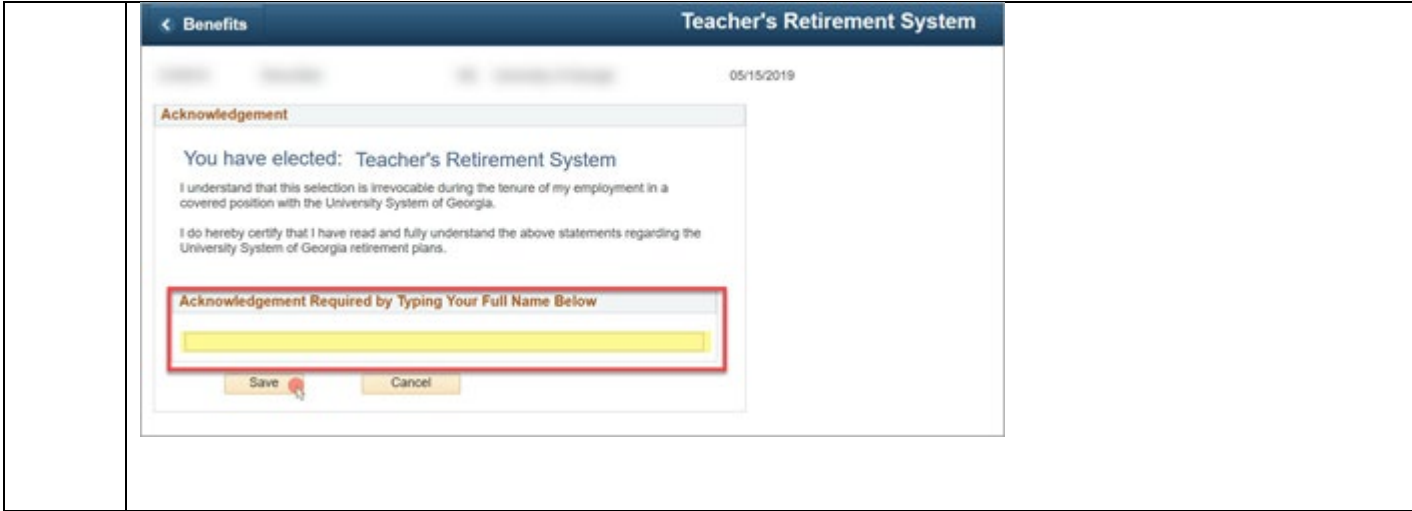
5.

The **Enroll in Your Retirement page** will populate with information regarding both the Teacher's Retirement System of Georgia (TRS) and the Optional Retirement Plan (ORP).
Select the plan of your choice by **clicking the Radio button associated with that plan.**

6.

Click **Continue**.
NOTE: If you are eligible for ERS, GSEPS, or need to make an election other than TRS or ORP for any other reason, you must contact your local institution's HR/Benefits office.

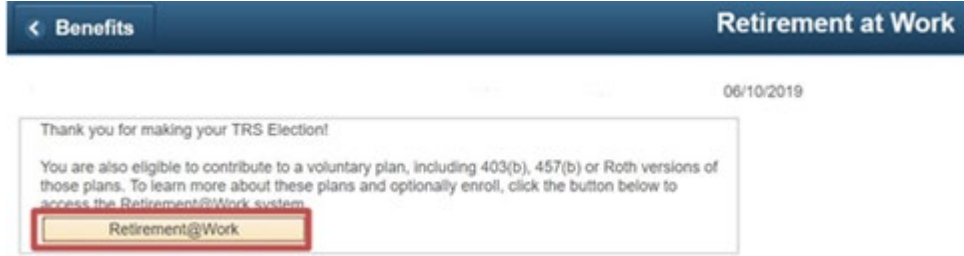
| | |
|----|--|
| | |
| 7 | <p>An acknowledgement message will populate. To confirm you understand the message, click OK.</p> <p>NOTE: You cannot change this election once it has been made. If you have questions, cancel out of this page, and get more information from your local HR/Benefits representative or via retirement.usg.edu.</p> |
| 8. | <p>If you elected Teacher's Retirement System (TRS), a Teacher's Retirement System acknowledgement signature panel will load.</p> <p>Acknowledge your enrollment in Teacher's Retirement System by Typing Your Full Name in the box provided.</p> |
| 9. | <p>Click Save.</p> <p>NOTE: You should receive an email confirmation of your election.</p> |



10. The following Retirement@Work link will populate.

Click Retirement@Work to access the website for enrollment in voluntary savings plans (403(b), 403(b) Roth, 457(b), 457(b) Roth) if desired.

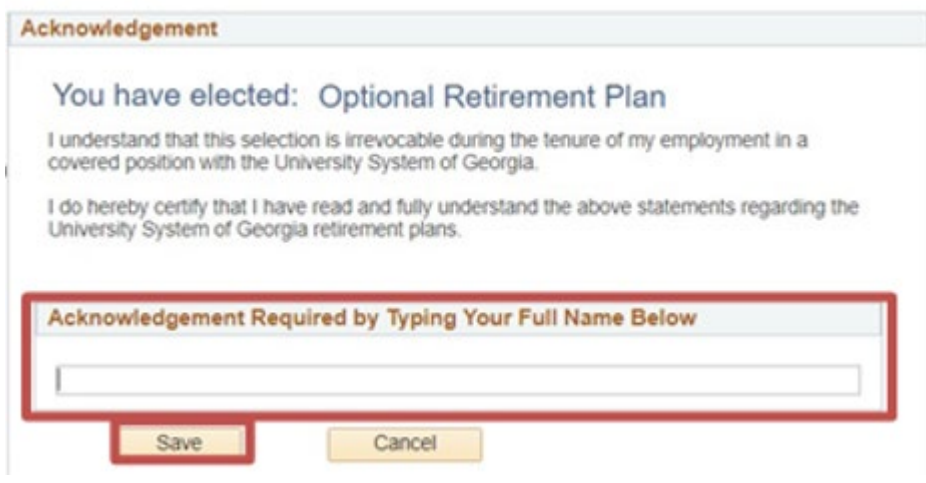
NOTE: This is an **optional**, additional retirement savings plan.



If you elected the Optional Retirement Plan, an Optional Retirement Plan acknowledgement signature panel will load. Acknowledge your enrollment in the Optional Retirement Plan by Typing Your Full Name in the box provided.

11. Click **Save**.

NOTE: You should receive an email **confirmation** of your election.

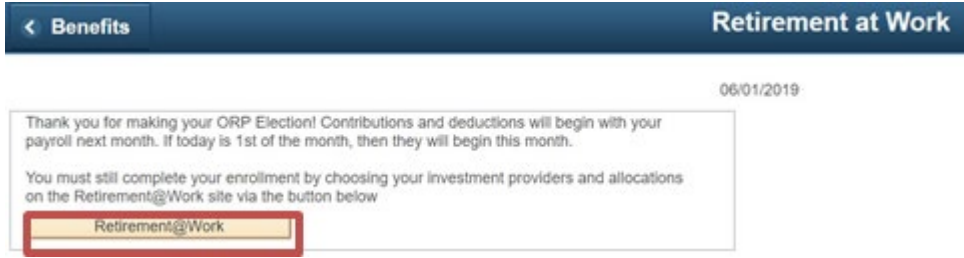


12. The following Retirement@Work link will populate.

NOTE: You are NOT finished – with ORP.

You must continue to the Retirement@Work site to **choose** your investment providers.

If you do not complete this step, your investments will **default to TIAA** into the Vanguard Retirement Date fund based on your age.

| | |
|-----|---|
| | <p>Even if you intend to select those options, please complete this step in Retirement@Work.</p>  |
| 13. | <p>Click Retirement@Work to access the website and allocate your retirement funds to your desired vendor(s), and to and enroll in voluntary savings plans (403(b), 403(b) Roth, 457(b) 457(b) Roth) if desired.</p> |

Note: Please be informed that your retirement plan choice is irrevocable during your University System of Georgia employment. This selection is permanent.

Resources

GSU Benefits Website Section for New Hires: <https://hr.gsu.edu/service-centers/benefits/new-hire-benefits/>

Mandatory Benefits Plan Comparison: https://hr.gsu.edu/service-centers/benefits/new-hire-benefits/#plan_comparison

USG Retirement Website: <https://www.usg.edu/hr/benefits/retirement>

Retirement@Work User Guide for ORP, 403(b), and 457(b): [User Guide](#)