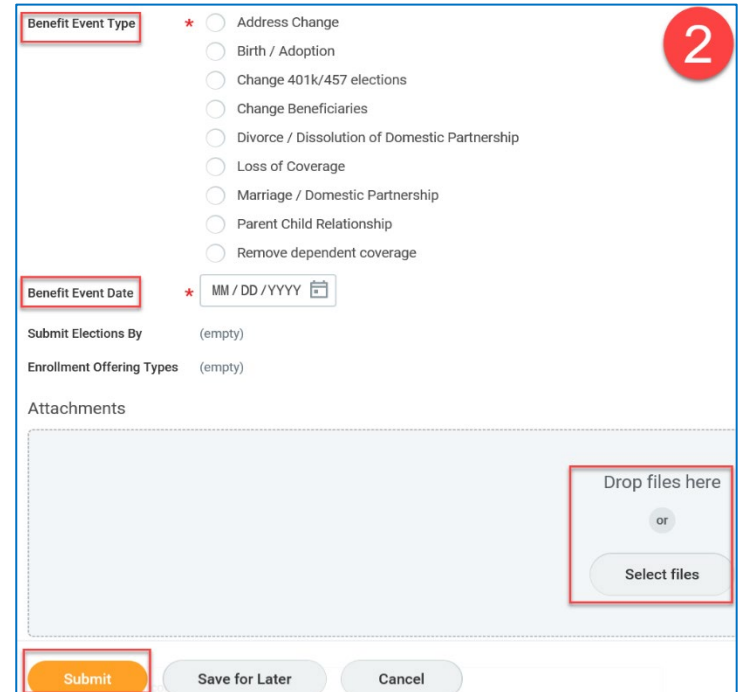
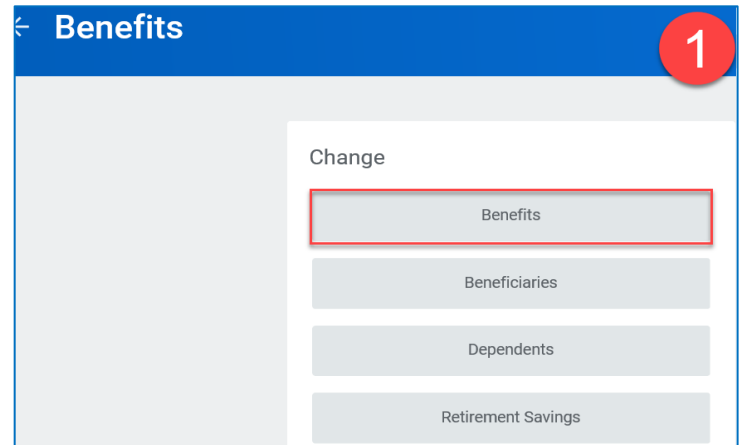
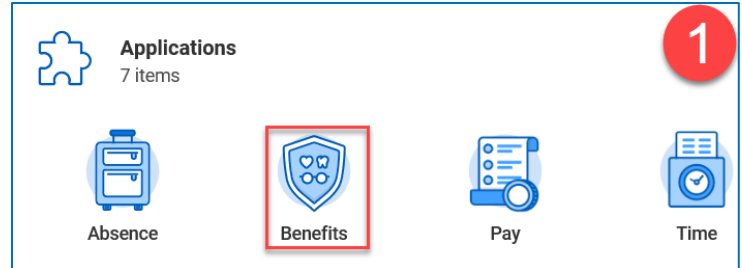


# User Job Aid: Change 401k/457 Elections Employee Initiated

## Purpose:

This Job Aid provides a step by step process to enroll or change a 401k/457 plan contributions. (Deferred Compensation)

1. Navigate to the Benefits Change page.
  - From the home page select the Benefits worklet
  - In the Change section, click the Benefits button
2. On the Change Benefits page:
  - Populate the Benefit Event type – Change 401k/457 elections
  - Populate the Benefit Event Date – Today's date or a future date
  - If you are changing your 401K contribution or starting to contribute to a 401K plan, the deduction will begin in the next available pay period
  - If you are changing your 457 contribution or starting to contribute to a 457 plan, the deduction will begin on the first of the month following the event date
  - You will be able to review the deduction begin date at the review step, prior to submitting your changes
  - Click Submit



# User Job Aid: Change 401k/457 Elections Employee Initiated

- On the You have submitted page:
  - Select the Open button
- For each retirement plan you would like to enroll in, select the Elect radio button. Scroll to the end of the page to view all plans available.
  - Enter the Employee Contribution by Percent or Amount
  - To change the current contribution amount, click in the field and update the amount
  - Click Continue

**You have submitted** 3

Benefit Event: Abe Lincoln (On Leave) (51237016) on 12/20/2018

Up Next

Abe Lincoln

Change Benefit Elections

**Open**

**Change Benefit Elections** 4

Change 401k/457 elections for Abe Lincoln (On Leave) (51237016) - Step 1 of 2 [Action](#)

Total Employee \$100.00 Biweekly Cost

Event Date 12/20/2018  
Initiated On 12/20/2018  
Submit Elections By 01/18/2019

Retirement Savings Elections [Forms](#)

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution	Provider Website
401(k) - Lincoln Financial Group	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent 0 Amount (Biweekly) 100.00	Percentage Maximum 100 Amount Maximum (Biweekly) \$23,000.00	Lincoln Financial Group
401(k) - Lincoln Financial Group - Roth	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Maximum 100	Lincoln Financial Group

[Continue](#) [Save for Later](#) [Cancel](#)



# User Job Aid: Change 401k/457 Elections Employee Initiated

## 5. Validate the changes made in the Elected Coverages section

### Change Benefit Elections

Benefit Elections Review for Change 401k/457 elections - Step 2 of 2 Actions

**5**

Total Employee Net Cost/Credit  
\$100.00 Biweekly Cost

Worker: Abe Lincoln (On Leave) (51237016)  
Event Date: 12/20/2018  
Initiated On: 12/20/2018  
Submit Elections By: 01/18/2019

Elected Coverages 1 item

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Beneficiaries	Employee Cost (Biweekly)
401(k) - Lincoln Financial Group	11/24/2018	11/24/2018	\$100.00		\$100.00
Total:					\$100.00

> **Waived Coverages**

## 6. Scroll to the bottom of the page, read Electronic Signature section and select the I Agree checkbox.

*The Benefits Partner (HR) will review the change and take appropriate action:*

- *Approve – change is approved*
- *Send Back – change is returned to you for editing*
- *Deny – change is terminated and notification is sent to employee*

### Electronic Signature

**6**

Legal Notice: Please Read

Your name and password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy and eligibility of the information being submitted. When you check the "I Agree" checkbox, you are certifying that:

- You understand and approve the transaction and any associated salary and benefit enrollment changes.
- You are authorizing Placer County to deduct from your earnings the amount of your premiums or other required contributions for the benefit options elected.
- You understand and acknowledge that under Internal Revenue Code regulations related to pre-tax contributions such as medical, dental, vision, and flexible spending accounts, changes to your benefits may only occur during Open Enrollment or in the case of a qualifying life event.
- You understand and acknowledge that you are responsible for notifying Human Resources of any life events impacting benefit coverage such as marriage, divorce, loss of other coverage, or a birth/adoption. This notification must be made within 30 days of the event or 60 days for a birth/adoption event. If notification is not received within the required time frame, the change will be declined and you will be responsible for any premium charges resulting from the late notification.

Deferred Compensation Acknowledgement:

- You are authorizing Placer County to deduct from your earnings the amount of your designated contribution. Placer County will send this amount to the deferred compensation provider as contributions.
- The first payroll deduction will take place as soon as administratively possible or as allowable by IRS regulations.
- While employment continues, this agreement legally binds both you and the employer for amounts deferred while it is in effect. A new agreement must be submitted to change your deferral amount.
- This agreement will apply only to amounts not yet currently available to you. It will not apply to any amounts earned after the agreement is terminated.
- If you do not provide investment choices, your contributions will be invested in the default fund chosen by your employer.

I Agree



Process Complete!