

Quick Start Guide for the Voluntary Individual 403(b) Retirement Plan (TSA)

Everything for your employer's retirement plan.
In one location.

Welcome to Retirement@Work®, where you can:

- Review important plan documents
- Enroll in the State System Voluntary Individual 403(b) Retirement Plan (TSA)
- View the list of available investment choices across vendors
- Choose your preferred voluntary retirement plan vendor(s)
- Link to the investment vendor's website to complete your TSA investment account and designate your beneficiaries
- Change your voluntary contribution amount at any time
- Manage your preferred retirement plan vendor(s)
- Access tools and resources for planning

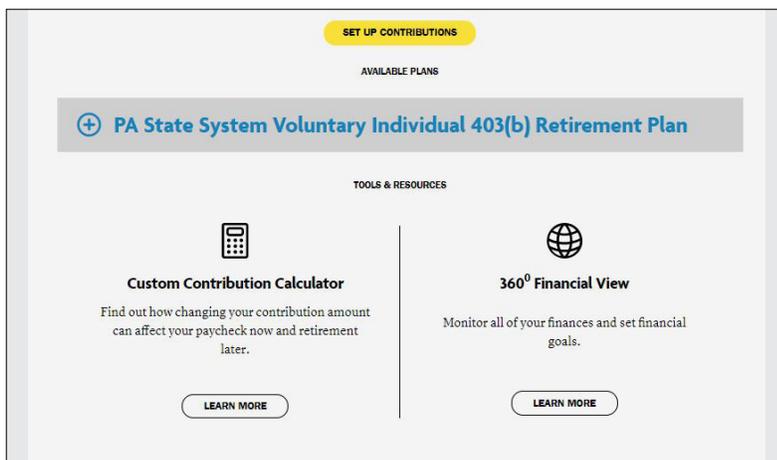
1. Access the State System Retirement@Work

Visit passhe.edu/enrolltsa and go to the Retirement@Work link location. Select Retirement@Work. If prompted, log in or register for access.

Note: If this is your first time using the site, you will need to register for access. Click *Register* and follow the prompts to enter your personal and security information. Once registered, you can take advantage of all the site has to offer.

2. Set up and manage your contributions

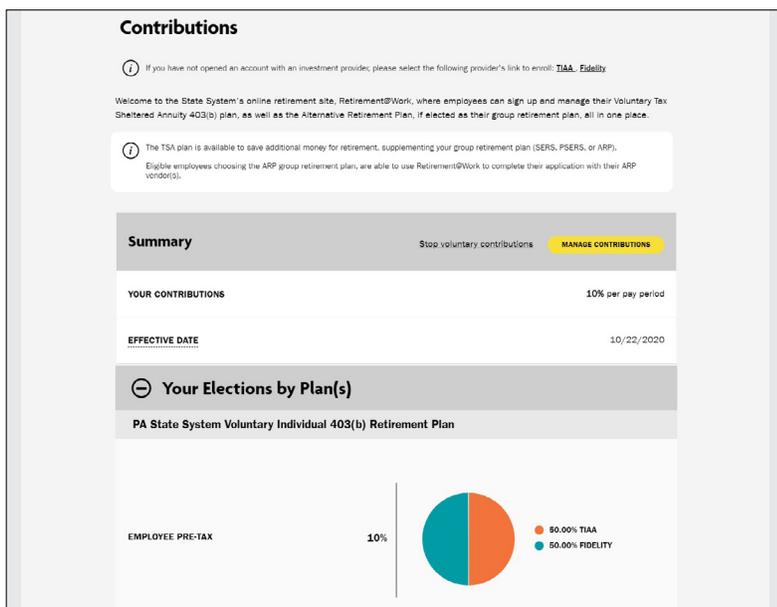
First time users: Click *Set Up Contributions*.



Click the + next to *PA State System Voluntary Individual 403(b) Retirement Plan* to read more information and review available investments for each vendor.

First time users can also research the investment options offered at both TIAA and Fidelity when the plan details are expanded.

Returning users: Click the *CONTRIBUTIONS* tab at the top of the screen, then click *Manage Contributions*.



Note:

If you have more than one employee personnel number because you are employed in more than one position, the summary will show each position separately. For example, each position will be listed as:

- State System Personnel #1
- State System Personnel #2
- State System Personnel #3

On the next page, enter the amount you want to contribute to the voluntary plan per pay period and when you want contributions to start. You have the option to contribute a percentage or dollar amount.

The screenshot shows a form titled "MANAGE CONTRIBUTIONS" with the heading "Let's set up your retirement contributions". It includes introductory text about the TSA plan and a question: "How much do you want to contribute to your retirement?". There are two radio button options: "A percentage" (selected) and "A dollar amount". Below this is a text input field for "AMOUNT PER PAY PERIOD:" containing the value "10" and a percentage sign. A second question asks "When would you like to start making contributions?" with two radio button options: "First available paycheck" (selected) and "Future date". At the bottom are "CANCEL" and "NEXT" buttons.

3. Select investment vendors

Enter the percentage you wish to allocate to each vendor. Ensure your total equals 100 percent.

The screenshot shows a form titled "MANAGE CONTRIBUTIONS" with the heading "Who would you like to handle your retirement investments?". It includes text about selecting vendors and a link to "Research these investment providers". Below this is a table for "PA State System Voluntary Individual 403(b) Retirement Plan" under the "Employee Pre-tax" category. The table has two rows: "TIAA" with a value of "50" and "Fidelity" with a value of "50". A "TOTAL (must equal 100%): 100%" is shown at the bottom of the table. "BACK" and "NEXT" buttons are at the bottom of the form.



To research the investment options offered at both TIAA and Fidelity:

- Click the *Education & Tools* tab at the top of the screen
- Click the + sign next to the plan name
- Click the *Research your investment options* link

4. Review your contributions

Check to be sure your desired selections are reflected in the summary.

If they are not, click the *Edit* button to make changes.

Once your selections are shown, review the "Terms and Conditions," check the box, then click *Confirm*. The next page will confirm that your elections were submitted.

5. Open your investment account(s) and select investments

Click the name of each vendor you selected to open an account with them (if you do not have one already) and select your investments by plan. You will exit Retirement@Work and be taken to each vendor's website to complete your enrollment. If you selected more than one vendor, you must return to this page to click each vendor's name to complete the process.



TIAA

Clicking the *TIAA* button will take you directly to TIAA's enrollment site.

If you do not already have an account at TIAA, you will need to set up your account and choose your investments. Once on the TIAA site, click *Continue* and follow the prompts.

If you already have an account at TIAA, you will be directed to your account on the TIAA participant website.

Fidelity

Clicking the *Fidelity* button will take you directly to Fidelity's participant website.

If you do not currently have an account at Fidelity, you will need to click *Register* at the top of the screen and follow the prompts to open an investment account.

If you already have a Fidelity account, select *Log in* at the top of the Fidelity State System home page and enter your username and password.

Need help? We've got you covered.

Site support

Call Retirement@Work at 844-567-9090, weekdays, 8 a.m. to 10 p.m. (ET).

Advice and education

You can get help deciding how to create the right investment mix with your chosen investment vendor(s), over the phone or in person.

- TIAA: 800-842-2252
- Fidelity Investments: 800-343-0860

General plan questions

Contact your University Human Resources office.

Learn more

Visit www.passhe.edu/enrolltsa.