Voluntary Retirement Elections

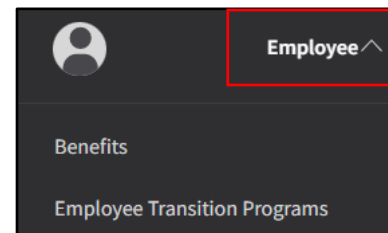**Luma Role:** Employee

Reason: An existing employee needs to view and enroll in Voluntary Retirement benefits based on eligibility.
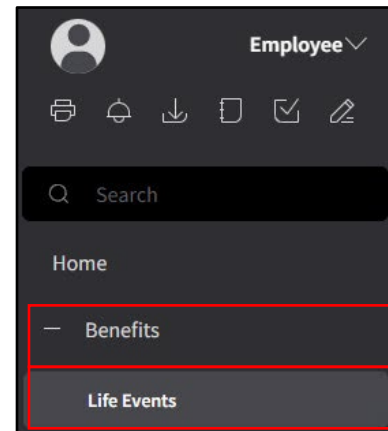
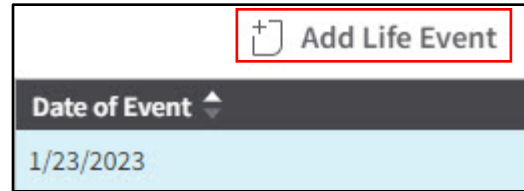|	
1. From the available application menu, select the **Infor Global HR** application.	
2. From the **Role Switcher**, select **Employee.**	
3. Select **Benefits** to expand the menu. **4.** Select **Life Events**.	
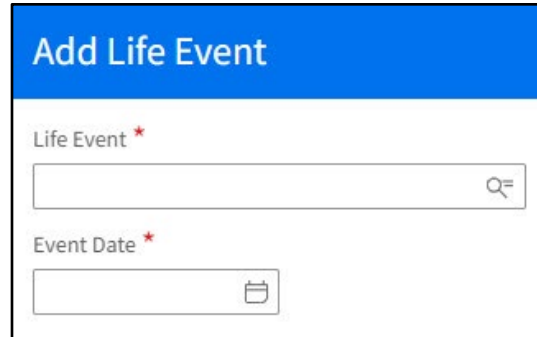
5. Click the **Add Life Event** button on the **My Life Events** page.

6. On the **Add Life Event** form, complete the fields listed below.
- **Life Event** – VOLUNTARY RETIREMENT
- **Event Date**

7. Click **Submit**.
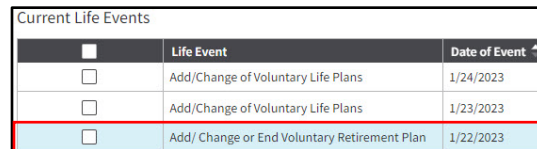
8. Select the checkbox for **Add/Change or End Voluntary Retirement Plan**.

9. Click **View Life Event**.

10. Complete each section of the **Add/Change or End Voluntary Retirement Plans** page. Click **Next** in the upper right-hand corner to move from section to section
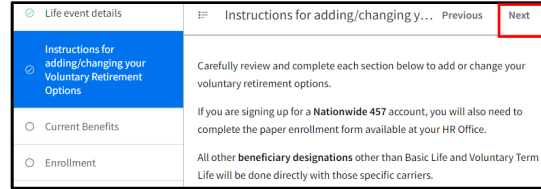
11. Review the **Instructions** section.

12. Click **Next** in the upper right-hand corner.

13. Review **Current Benefits**.
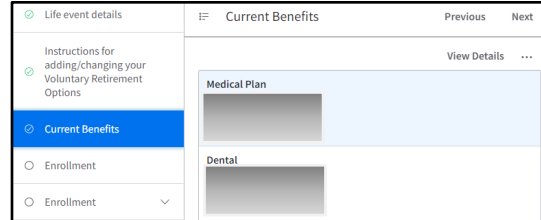
14. Click **Next** in the upper right-hand corner.

15. *Optional* - Click the **View Worksheet** button on the **Enrollment** page to view all plan enrollments.
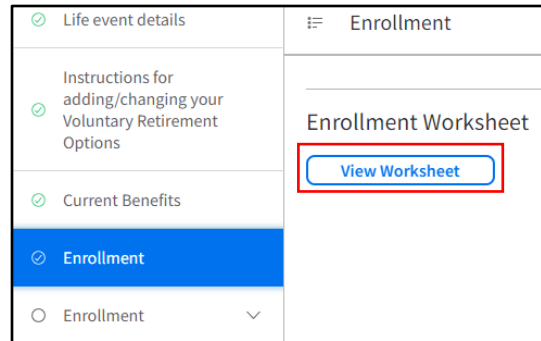
16. **Note**: The plan enrollment worksheet is not editable and available only to view. The worksheet opens in a new browser tab. Close the browser tab to return to the Enrollment page.
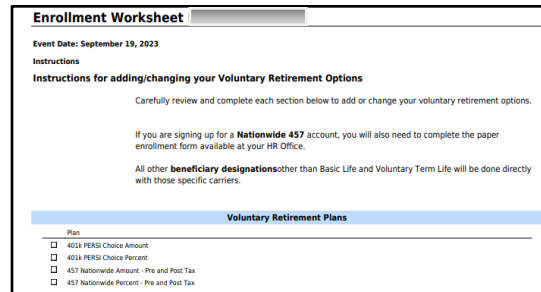
17. Click **Next**.

Note: This will expand the next Enrollment section. Complete each of these sections.

18. Click the **Benefit Choices** button on the **Voluntary Retirement Plan** page.

Previous	Next

☰ **Benefit Choices**   ...

19. On the **Select Benefits** form, click the **Select** button next to the desired benefit.
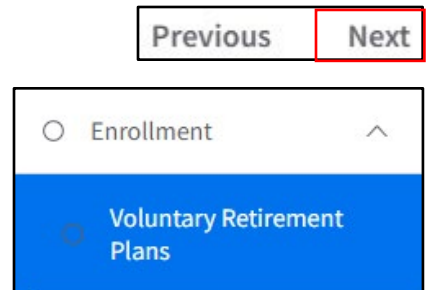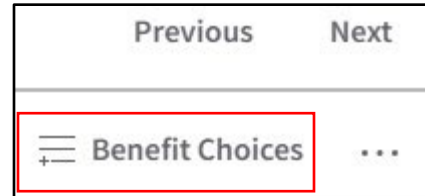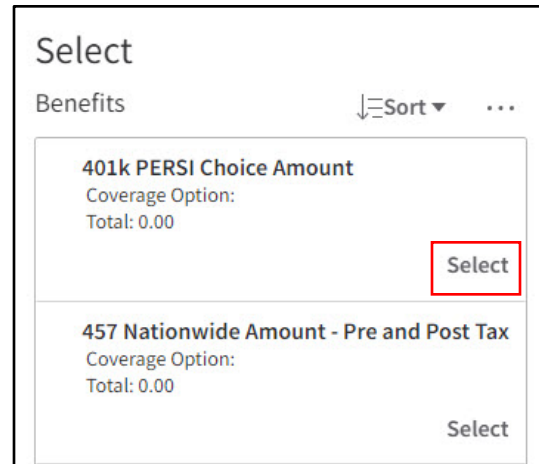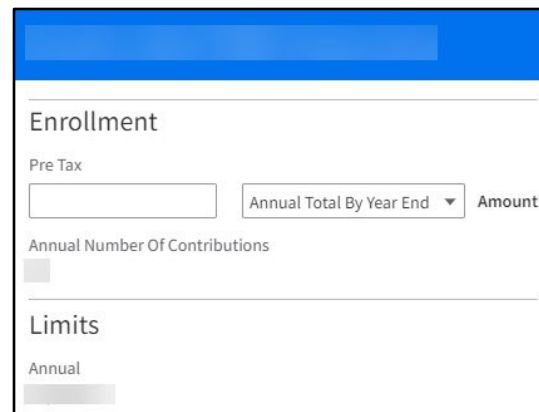
Select

Benefits   ↓≡Sort ▾   ...

401k PERSI Choice Amount
Coverage Option:
Total: 0.00

Select
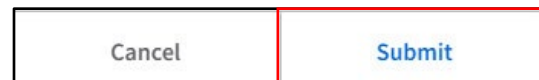
457 Nationwide Amount - Pre and Post Tax
Coverage Option:
Total: 0.00

Select

20. Complete the **Enrollment** form based on the selection.

Note: This form will differ based on your selection.

Enrollment

Pre Tax

[   ]   [Annual Total By Year End ▾]   Amount

Annual Number Of Contributions

Limits

Annual

21. Click **Submit**.

Cancel	**Submit**

22. On the **Select Benefits** form, click **Close**.

Close
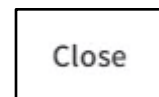
23. Click **Next** in the upper right-hand corner.

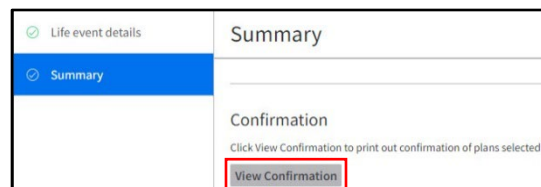| Previous	Next

Luma

24. Click **Submit** on the **Review and Submit** tab.
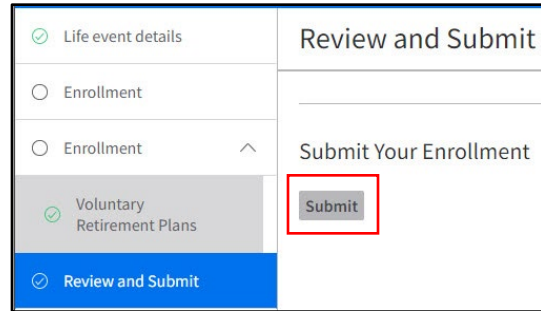
25. Click **Submit**.
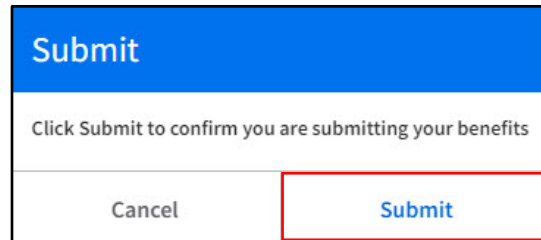
26. Click the **View Confirmation** button on the **Summary** page to view the confirmation of the plans selected.

Result

You have successfully viewed and enrolled in benefits based on eligibility in Luma.

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Date (10/04/23)

Version 1