



## Voluntary Retirement Elections

**Role:** Employee

**Reason:** You need to view and enroll in Voluntary Retirement benefits based on eligibility.

1. To begin, navigate to the *Infor Global HR* application.
2. From the **Role Switcher** select **Employee**.
3. Select **Benefits** to expand the side menu.
4. Select **Life Events**.

5. Click the **Add Life Event** button on the **My Life Events** page.



6. Complete the following fields on the **Add Life Event** form:

- **Life Event** – VOLUNTARY RETIREMENT
- **Event Date:**
  - **Current Date** – Enter the current date if you would like this to be effective in the current pay period.
  - **Future Date** – Enter a future pay period end date if you would like this to begin at a future pay date.

7. Click the **Submit** button.

8. Select the checkbox for the **Add/Change or End Voluntary Retirement Plan** line on the **My Life Events** page.

Current Life Events	
<input type="checkbox"/>	Life Event
<input checked="" type="checkbox"/>	Add/Change or End Voluntary Retirement Plan

9. Click the **View Life Event** button.

My Life Events

Current Life Events

10. Review the **Instructions for adding/changing your Voluntary Retirement Options** page.

Add/Change or End Voluntary Retirement ...

Next

Instructions for adding/changing your Voluntary Retirement Options

11. Click the **Next** button in the upper right-hand corner of the page.

Next

12. Review the **Contact Information** page.

Contact Information

13. *Optional* – Click one or more of the following buttons if the following contact information need to be added:

- **Add Phone**
- **Add Email**

**Note:** Right-click current contact information that needs to be updated. Select *Update Email* or *Update Phone* from the drop-down menu.

Contact Information

Contact Information

Email

Emergency Contacts

- Add Phone
- Add Email
- Add IM
- Sort
- Inactivate
- 
- Delete

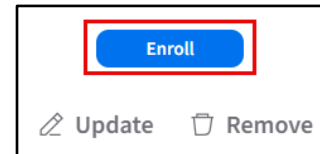
14. Review the **Emergency Contacts** section.

Emergency Contacts

15. *Optional* – Click the **Add Contact** button in the **Emergency Contacts** section to add a new emergency contact.



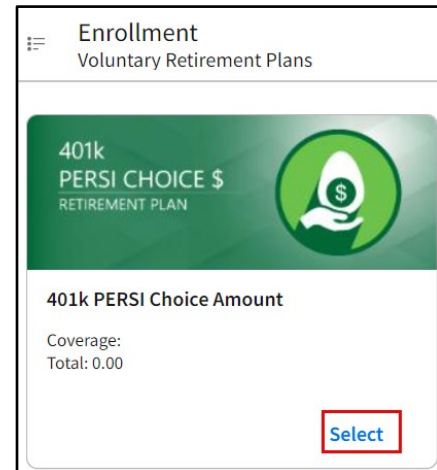
16. Click the **Enroll** button in the upper right-hand corner of the page.



17. Review the **Voluntary Retirement Plans** in the **Enrollment – Voluntary Retirement Plans** section.

18. Click the **Select** button on the **Voluntary Retirement Plan** of your choosing.

**Note:** The selected plan will automatically move to the first position on the page once you click the *Select* button.



19. Complete the applicable fields on the **Enroll In Retirement Plan** pop-up window.

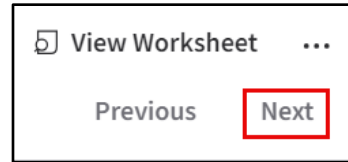
**Note<sup>1</sup>:** Fields on the *Enroll In Retirement Plan* pop-up window will vary depending on the retirement plan you select.

**Note<sup>2</sup>:** If selecting a 'percentage' contribution, do not contribute more than 83% (to allow for required deductions like FICA, PERSI, etc.). If you enter more than 83%, the contribution may encounter an error and not get generated on payroll.

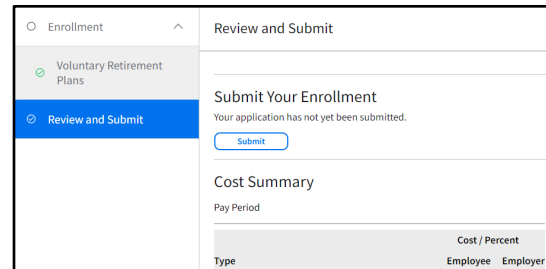
A screenshot of the 'Enroll In 401k PERSI Choice Amount' pop-up window. The title is 'Enroll In 401k PERSI Choice Amount'. Below it is a section titled 'Enrollment' with a 'Pre Tax' label. There are three input fields: a text box, a 'Per Pay Period' dropdown, and an 'Amount' text box. Below these is a label 'Annual Number Of Contributions' with a corresponding input field. At the bottom are two buttons: 'Cancel' and 'Submit'.

20. Click the **Submit** button.

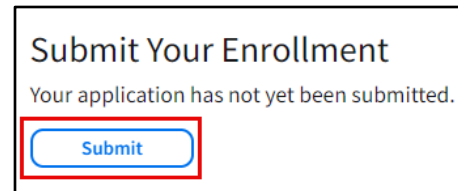
21. Click the **Next** button in the upper right-hand corner of the page.



22. Review the **Cost Summary** section of the **Review and Submit** section.

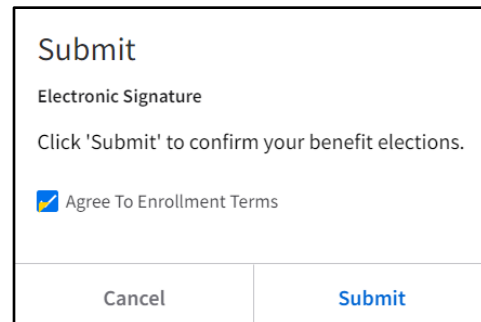


23. Click the **Submit** button.



24. Select the **Agree to Enrollment Terms** checkbox on the **Submit** pop-up window.

25. Click the **Submit** button.



26. *Optional* – Click the **View Confirmation** button for a PDF of the confirmation page.



**Note:** This will prompt a new browser window to open.

## Result

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

*Images shown are for illustration purposes only and may not be an exact representation of the product due to the environment in which they were captured. In addition, interfaces (colors, message locations, etc.) may vary based on user preferences.*

*It is the user's responsibility to understand and follow all applicable statutes, rules, and policies.*

Date 03/24/25

Version 4