



## Voluntary Retirement Elections

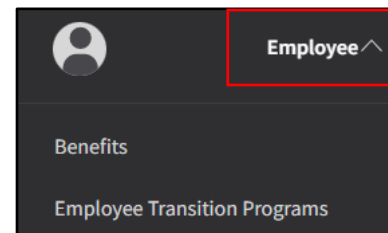
**Luma Role:** Employee

**Reason:** An existing employee needs to view and enroll in Voluntary Retirement benefits based on eligibility.

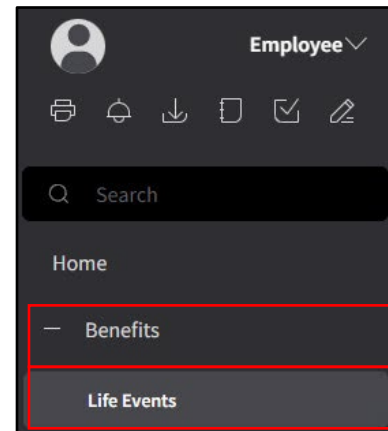
1. From the available application menu, select the **Infor Global HR** application.



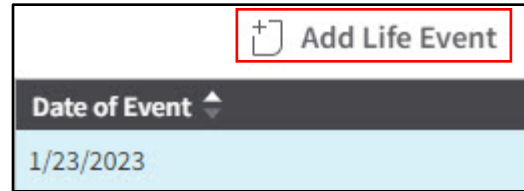
2. From the **Role Switcher**, select **Employee**.



3. Select **Benefits** to expand the menu.
4. Select **Life Events**.

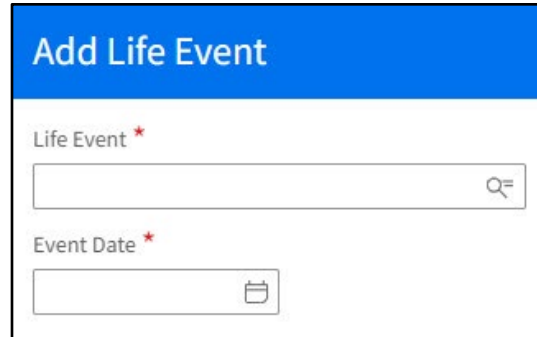


5. Click the **Add Life Event** button on the **My Life Events** page.



A screenshot of a user interface element. At the top, there is a button labeled "Add Life Event" with a plus icon, enclosed in a red rectangular box. Below the button is a dropdown menu for "Date of Event" with a small upward arrow icon. The selected date is "1/23/2023".

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



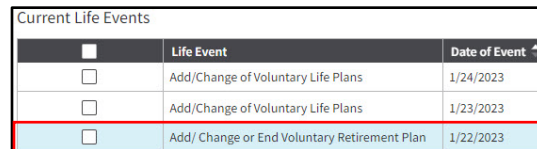
A screenshot of the "Add Life Event" form. The title "Add Life Event" is in a blue header. Below the header, there are two input fields. The first is labeled "Life Event \*" and contains a search icon. The second is labeled "Event Date \*" and contains a calendar icon.

7. Click **Submit**.



A screenshot of two buttons. The "Cancel" button is on the left and the "Submit" button is on the right. The "Submit" button is highlighted with a red rectangular box.

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



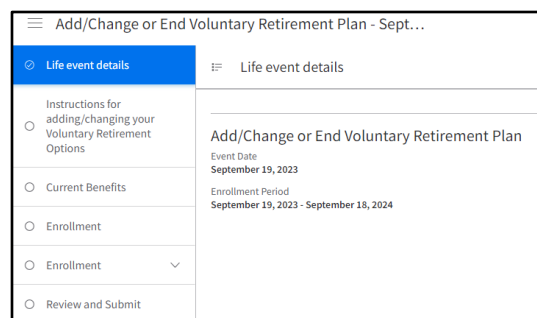
	Life Event	Date of Event
<input type="checkbox"/>	Add/Change of Voluntary Life Plans	1/24/2023
<input type="checkbox"/>	Add/Change of Voluntary Life Plans	1/23/2023
<input type="checkbox"/>	Add/ Change or End Voluntary Retirement Plan	1/22/2023

9. Click **View Life Event**.



A screenshot of two buttons. The "Add Life Event" button is on the left and the "View Life Event" button is on the right. The "View Life Event" button is highlighted with a red rectangular box.

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

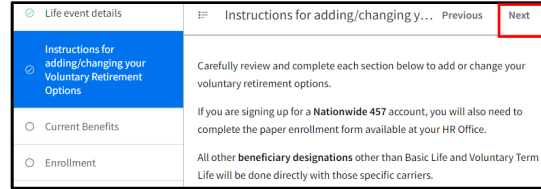


A screenshot of the "Add/Change or End Voluntary Retirement Plan" page. The page title is "Add/Change or End Voluntary Retirement Plan - Sept...". The page is divided into two columns. The left column contains a list of sections: "Life event details" (selected), "Instructions for adding/changing your Voluntary Retirement Options", "Current Benefits", "Enrollment", "Enrollment", and "Review and Submit". The right column contains the details for the selected section: "Add/Change or End Voluntary Retirement Plan", "Event Date: September 19, 2023", and "Enrollment Period: September 19, 2023 - September 18, 2024".



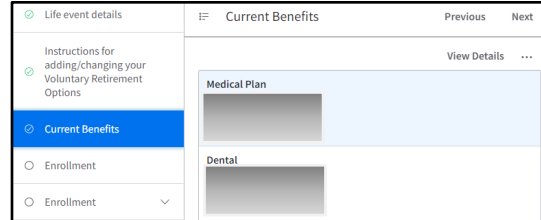
A screenshot of two buttons. The "Previous" button is on the left and the "Next" button is on the right. The "Next" button is highlighted with a red rectangular box.

11. Review the **Instructions** section.



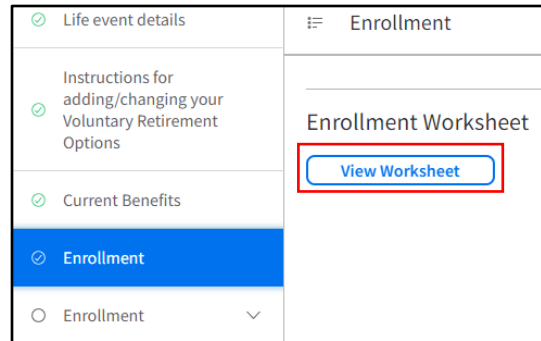
12. Click **Next** in the upper right-hand corner.

13. Review **Current Benefits**.

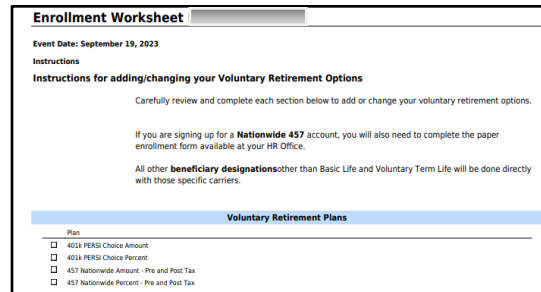


14. Click **Next** in the upper right-hand corner.

15. *Optional* - Click the **View Worksheet** button on the **Enrollment** page to view all plan enrollments.

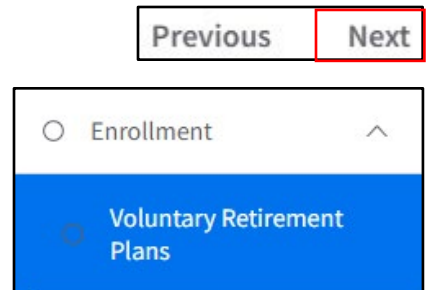


16. **Note:** The plan enrollment worksheet is not editable and available only to view. The worksheet opens in a new browser tab. Close the browser tab to return to the Enrollment page.

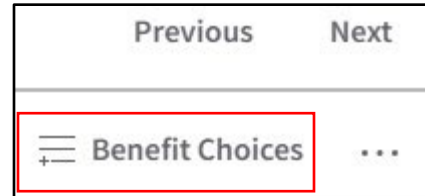


17. Click **Next**.

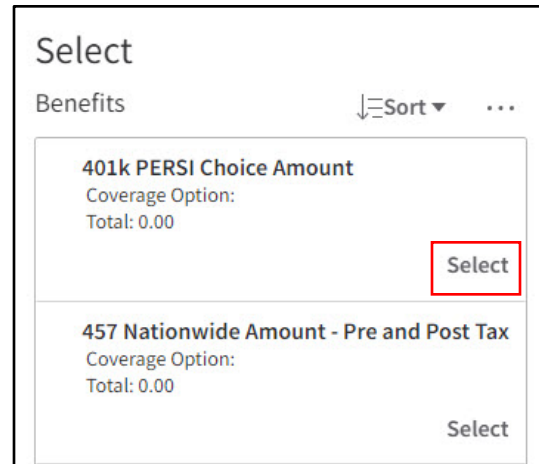
**Note:** This will expand the next Enrollment section. Complete each of these sections.



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

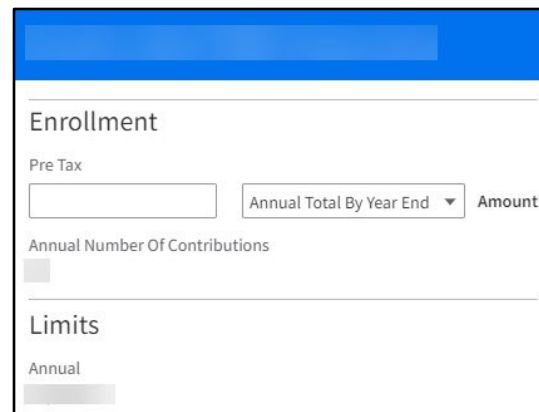


19. On the **Select Benefits** form, click the **Select** button next to the desired benefit.

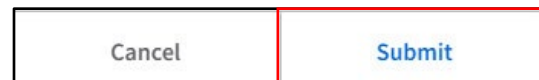


20. Complete the **Enrollment** form based on the selection.

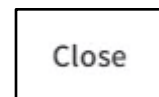
**Note:** This form will differ based on your selection.



21. Click **Submit**.



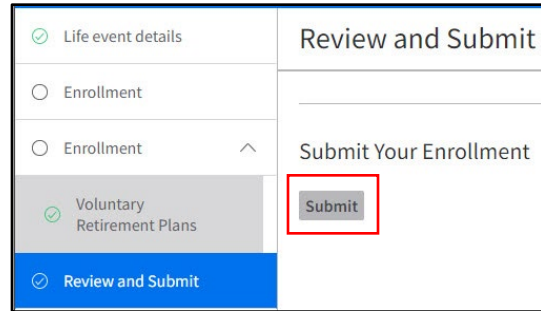
22. On the **Select Benefits** form, click **Close**.



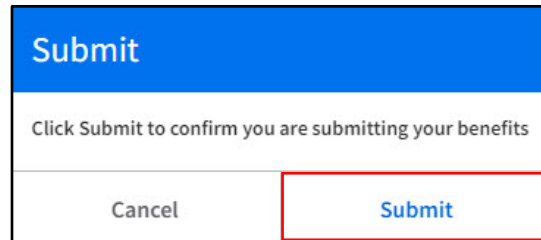
23. Click **Next** in the upper right-hand corner.



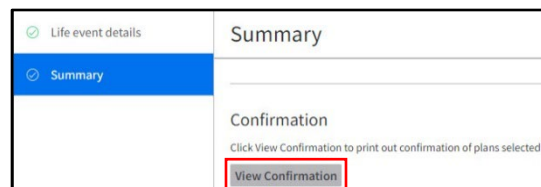
24. Click **Submit** on the **Review and Submit** tab.



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.

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.

Date (10/04/23)

Version 1