



Voluntary Retirement Elections

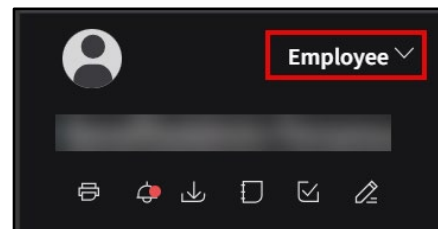
Luma Role: Employee

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.

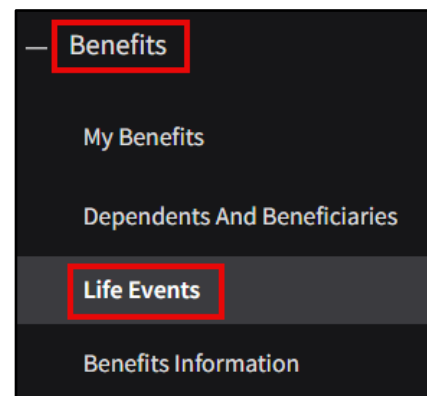


2. From the **Role Switcher**, select **Employee**.

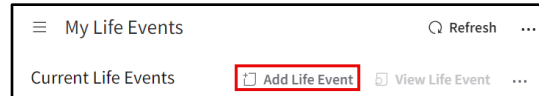


3. Select **Benefits** to expand the menu.

4. Select **Life Events**.

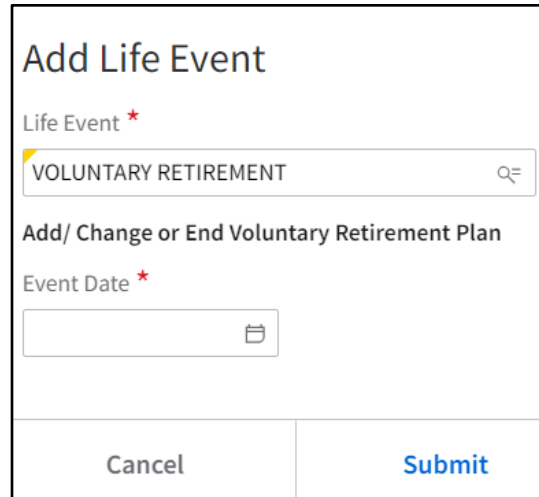


5. Click the **Add Life Event** button on the **My Life Events** page.



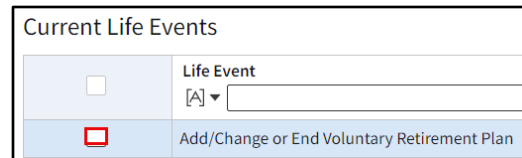
6. Complete the following fields on the **Add Life Event** form.

- **Life Event** – VOLUNTARY RETIREMENT
- **Event Date** – Must be the first date of the current or previous pay period

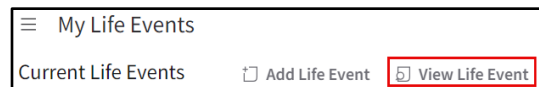


7. Click the **Submit** button.

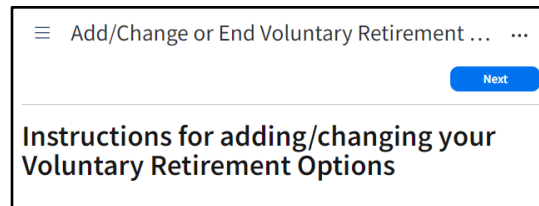
8. Select the checkbox for **Add/Change or End Voluntary Retirement Plan**.



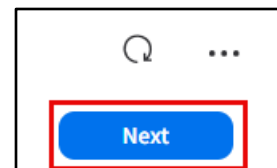
9. Click the **View Life Event** button.



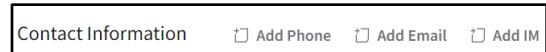
10. Review the **Instructions for adding/changing Voluntary Retirement Options** page.



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



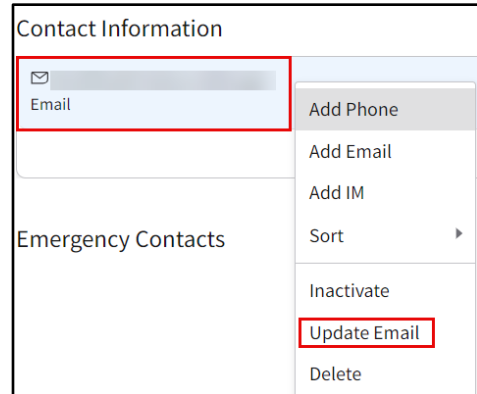
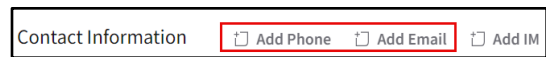
12. Review the **Contact Information** page.



13. *Optional* – Select the following icons if they need to be added.

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

Note: Right-click current contact information and select *Update Email* or *Update Phone* from the menu if the information needs to be updated.



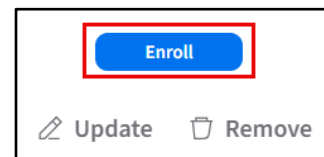
14. Review the **Emergency Contacts** section.



15. *Optional* – Click the **Add Contact** icon in the Emergency Contacts section.



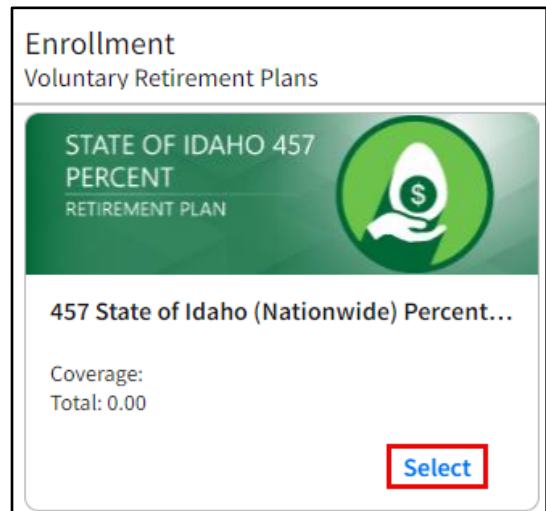
16. Click the **Enroll** button in the upper right-hand corner of the page.



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 top of the plans once you click the *Select* button.



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

Note: Pop-up fields will vary depending on the retirement plan you select.

Enroll In 457 State of Idaho (Nationwide)
Percent - Pre and Post Tax

Enrollment

Pre Tax

After Tax

Cancel Submit

20. Click the **Submit** button.

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

View Worksheet ...

Previous **Next**

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

Enrollment

Voluntary Retirement Plans

Review and Submit

Review and Submit

Submit Your Enrollment

Your application has not yet been submitted.

Submit

Cost Summary

Pay Period

Type	Cost / Percent
Employee	Employee
Employer	Employer

23. Click the **Submit** button.

Submit Your Enrollment

Your application has not yet been submitted.

Submit

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

25. Click the **Submit** button

Submit

Electronic Signature

Click 'Submit' to confirm your benefit elections.

Agree To Enrollment Terms

Cancel Submit

26. *Optional* – Click the **View Confirmation** button for a PDF 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 04/15/24
Version 2