Line Human Capital Management (HCM) Benefits & Administration

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.	■ My Life Events	C Refresh
	ye e page.	Current Life Events 🗗 Add Life Event	🖒 View Life Event 🛛 🚥
6.	Complete the following fields on the Add Life Event form:	Add Life Event	

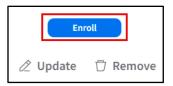
- Life Event VOLUNTARY RETIREMENT
- Event Date Enter current date
- 7. Click the **Submit** button.

Add Life Event			
Life Event *			
VOLUNTARY RETIREMENT	Q=		
Add/ Change or End Voluntary Retirement Plan			
Event Date *			
e			
Cancel	Submit		

8.	Select the checkbox for Add/Change or End Voluntary Retirement Plan on the My Life Events page.	Current Life Events Image: Constraint of the second seco
9.	Click the View Life Event button.	Image: marked big
10.	Review the Instructions for adding/changing 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.	Q ···· Next
12.	Review the Contact Information page.	Contact Information 🖞 Add Phone 🏠 Add Email 🎁 Add IM
13.	 Optional – Select the following icons if the following contact information needs 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 Add Phone Add Email Add IM Emergency Contacts Sort Inactivate Update Email Delete
14.	Review the Emergency Contacts section.	Emergency Contacts 1 Add Contact 2 Change Contact 1 Delete
15.	<i>Optional</i> – Click the Add Contact icon in the Emergency Contacts section.	Emergency Contacts 🗗 Add Contact 🖉 Change Contact 🗍 Delete 🛛



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

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

Note: Fields on the *Enroll in Retirement Plan* pop-up window will vary depending on the retirement plan you select.

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- **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 of the Review and Submit page.	C Enrollment Voluntary Retirement Plans Review and Submit	Review and Sub Submit Your E Your application has n Submit Cost Summary Pay Period	nrollment ot yet been submitted.
23.	Click the Submit button.	Submit Your Enrollment Your application has not yet been submitted.		
24. 25.	Select the Agree To Enrollment Terms checkbox on the Submit pop-up. Click the Submit button	Submit Electronic Signature Click 'Submit' to confirm your benefit elections. Agree To Enrollment Terms Cancel Submit		ms
26.	Optional – Click the View Confirmation button for a PDF Confirmation page. Note: This will prompt a new browser window to open.		View	Confirmation

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 12/16/24 Version 3

