



UBC FACULTY PENSION PLAN

VOLUNTARY CONTRIBUTIONS

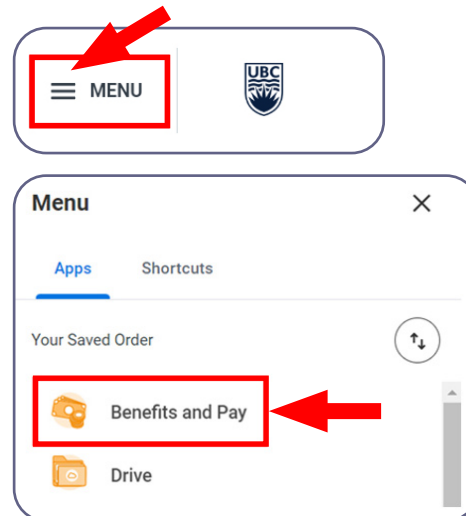
Step-by-Step Instructions in Workday

The following are step-by-step instructions intended to help guide you through the UBC Faculty Pension Plan's (FPP's) voluntary contribution enrollment process in Workday.

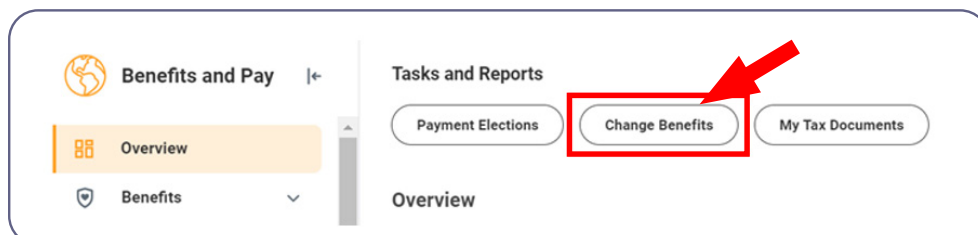
Note: These instructions are provided in this format as a courtesy and may be subject to change.

For the most current information, please refer to the Integrated Service Centre's **Workday Knowledge Base** located at isc.ubc.ca. Search for article **KB0017570, Enrol in the Faculty Pension Plan**. For questions about how to use Workday, please contact Workday Support.

STEP 1 Open **Workday** at myworkday.ubc.ca.
Click or tap on the navigation menu in the top left corner of the screen and select the **Benefits and Pay** application.



STEP 2 The **Benefits and Pay** hub will open. Select **Overview**. Under **Tasks and Reports**, select the **Change Benefits** button.



STEP 3 The **Change Benefits** page will open.

From the **Change Reason*** dropdown list, select **Enroll/Change/Cancel — Faculty Voluntary Contribution**.

The screenshot shows the 'Change Benefits' page with a dropdown menu for 'Change Reason *'. The menu is open, showing several options. The option 'Enroll/Change/Cancel - Faculty Voluntary Contribution' is highlighted with a red box, and a red arrow points to it from the right.

STEP 4 After you make your selection from the **Change Reason*** list above, the **Benefit Event Date*** field will appear. The Benefit Event Date must be the current date. Voluntary contribution instructions cannot be backdated or future dated.

Note: The deduction start date (or waive date) will be the start of the next pay period — either the 1st or the 16th of the month, depending on the Benefit Event Date.

Example:

- If your Benefit Event Date is from May 1 to 15, the deduction start date (or waive date) will be May 16.
- If your Benefit Event Date is from May 16 to 31, the deduction start date (or waive date) will be June 1.

The screenshot shows the 'Benefit Event Date *' field with a calendar icon. A red arrow points to the calendar icon. The calendar is open, showing January 2021. The date '1' is highlighted.

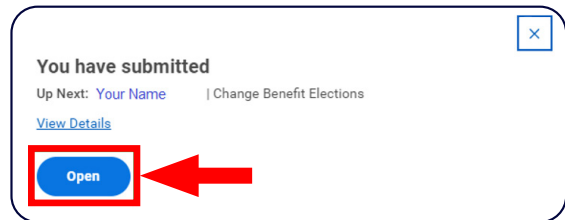
STEP 5 Select the **Submit** button.

Note: No comments or attachments are required. Any entered comments or uploaded attachments will not be reviewed.

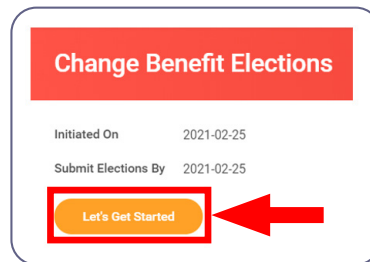
The screenshot shows the 'Change Benefits' page with the 'Submit' button highlighted with a red box and a red arrow. The page shows the 'Change Reason' dropdown set to 'Enroll/Change/Cancel - Faculty Volu...', the 'Benefit Event Date' set to '2024-02-25', and the 'Submit Elections By' date set to '2024-02-29'. There is also a 'Benefits Offered' field set to '(empty)'. Below these fields is an 'Attachments' section with a 'Drop files here' area and a 'Select files' button. At the bottom, there is a comment field and three buttons: 'Submit', 'Save for Later', and 'Cancel'.

STEP 6 When you have submitted your Benefit Event request successfully, a pop-up window that says **You have submitted** will appear.

Select the **Open** button to view the next action items.

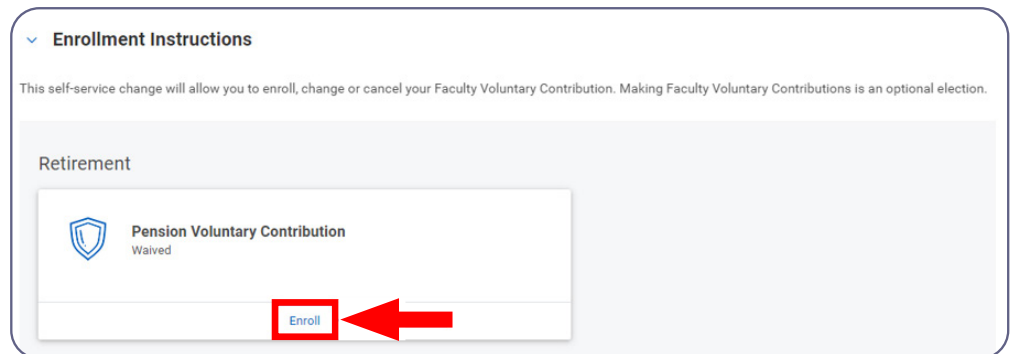


STEP 7 Select the **Let's Get Started** button.

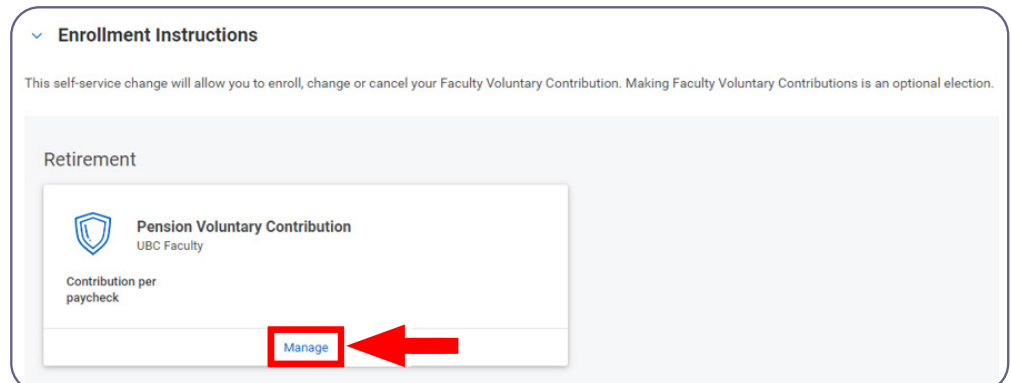


STEP 8 The **Enrollment Instructions** page appears when changes may be made.

In the box that says **Pension Voluntary Contribution**, select the **Enroll** button.



Note: If you are already enrolled for voluntary contributions, you will select the **Manage** button to make changes to the deduction amount.



STEP 9 The **Plans Available** page will then appear, and you will see options to either **Select** or **Waive** voluntary contributions.

To enroll, choose **Select**.

Plans Available
Select a plan or Waive to opt out of Pension Voluntary Contribution.

1 item

Benefit Plan	*Selection	You Contribute (Semimonthly)	Company Contribution (Semimonthly)
UBC Faculty	<input checked="" type="radio"/> Select <input type="radio"/> Waive		

STEP 10 You will then see the **Contribute** page.

In the **Per Paycheck Contribution (\$)** field, type in your amount.

Note: You may elect any fixed amount between \$0.01 and \$5,000.00. The amount must be less than the net pay amount on your semi-monthly paycheck.

Then select the **Save** button.

Contribute
Enter how much you want to contribute as an amount.

Contribution Type	Amount
Per Paycheck Contribution (\$)	xxx.xx

Minimum Amount: \$0.01
Maximum Amount: \$5,000.00

STEP 11 The **Enrollment Instructions** page will reappear and your changes will now show as **UPDATED**.

Select the **Review and Sign** button.

Enrollment Instructions
This self-service change will allow you to enroll, change or cancel your Faculty Voluntary Contribution. Making Faculty Voluntary Contributions is an optional election.

Retirement

Pension Voluntary Contribution
UBC Faculty
UPDATED

Contribution per paycheck \$xxx.xx

[Manage](#)

STEP 12 Scroll down the page until you reach the **Electronic Signature** section.

After reading the enrollment terms carefully, mark the checkbox next to **I Accept**.

Select the **Submit** button.

Electronic Signature

The personal information you provide is collected pursuant to Section 26 of the Access to Information Act for the purposes of benefits and pension administration, payment of Standards Act. UBC will not disclose any personal information to external third parties. For more information, contact the University of British Columbia, 607-1897 or university.counsel@ubc.ca

You must be authorized to disclose information about your spouse and dependent children.

By enrolling, you agree that all information you provide is true and complete and you authorize the following:

- Benefit Providers, their agents and service providers to use and exchange information with the Financial Institutions;
- Any benefits and claims that are payable in the event of your death will be payable to the beneficiary designated on the beneficiary waiver form. If a beneficiary is not designated, claims that are payable in the event of your death will be payable to the estate of the member;
- UBC to use the information for benefits and pension administration and to provide information to the Financial Institutions.

If you are enrolling for the Leave of Absence Benefit Plans, you authorize the following:

- Sun Life Assurance Company of Canada, its agents and service providers;
- The University of British Columbia (the "Payee") to use the account information for the purpose of making payments on the 1st business day of the month.

I certify that all information contained in this form is accurate and complete. I acknowledge that I am signing this agreement on behalf of the account holder. I acknowledge my Financial Institution has signed this agreement. I acknowledge my Financial Institution's terms of the Authorization including, but not limited to, the amount, as a condition to the issuance of the PAD arrangement and to the disclosure of my account information. I understand and agree to this PAD arrangement and to the disclosure of my account information. I/we have certain recourse rights if any debit does not conform to the account information on our/my recourse rights, I/we may contact our Financial Institution.

I Accept

Submit Save for Later Cancel

STEP 13 The **Submitted** page will open to confirm that your submission was successful.
