Retirement Services Division Job Aid
Defined Contribution Retirement Plan Enrollment, Termination, and Waiver

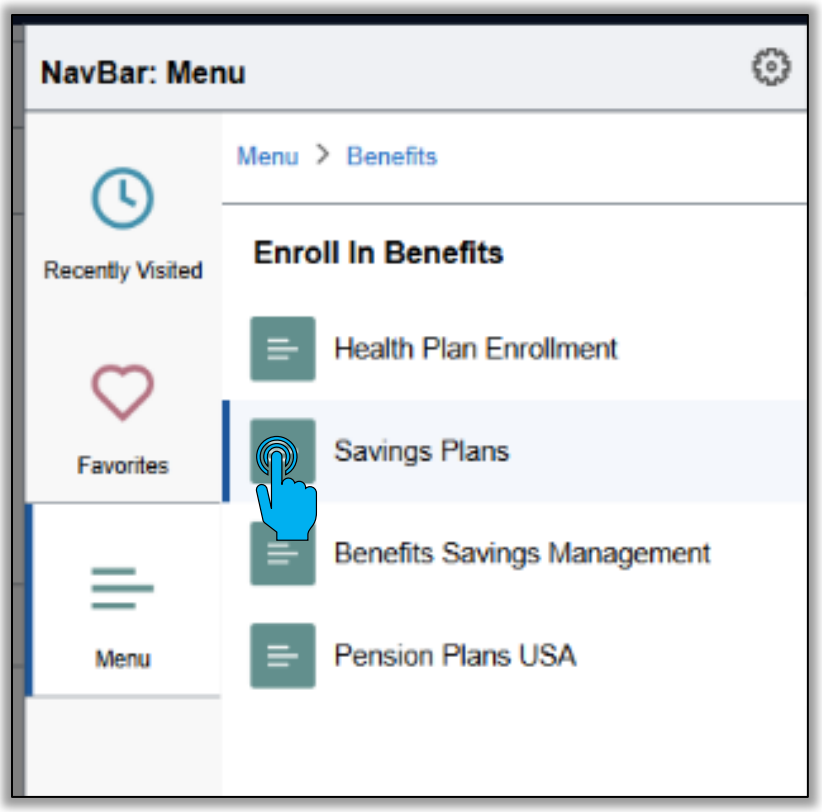
This job aid illustrates the steps taken to enter enrollments, waivers, and terminations of defined contribution plans using the Core-CT Savings Plans Page.

For further information regarding this enrollment process, please review the DC Enrollment Training on our website.[1]

I. Entering New Enrollments

Navigate to the Savings Plans Page

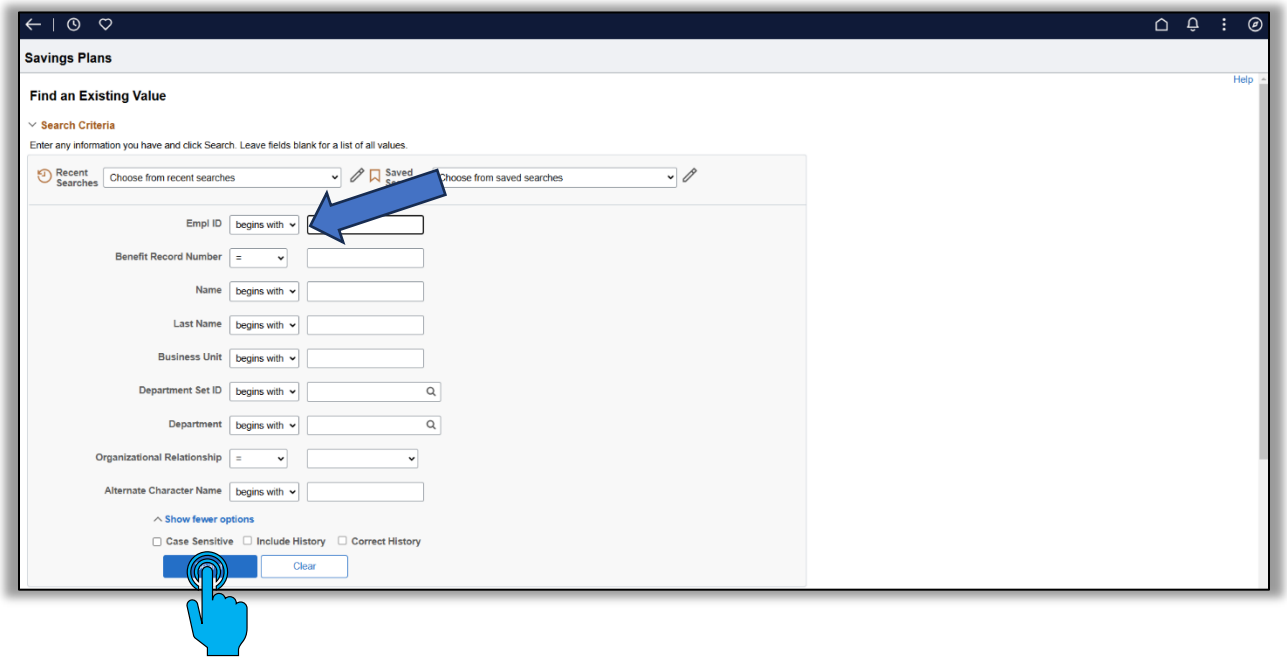
Begin by navigating to the Savings Plans page at: **NavBar: Menu → Benefits → Enroll in Benefits → Savings Plans**



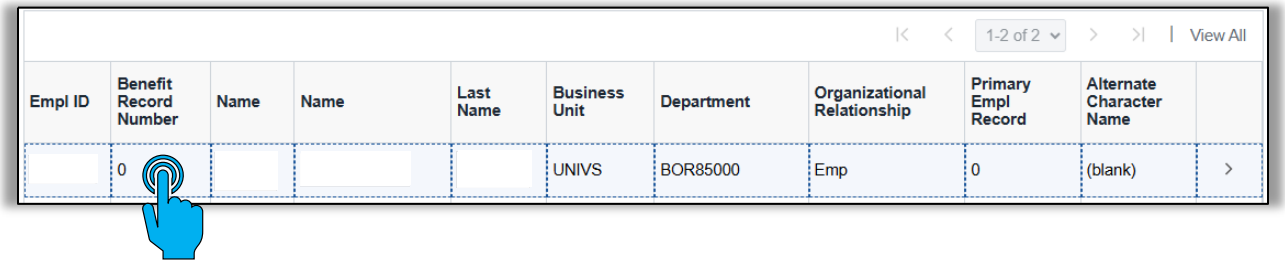
[1] osc.ct.gov/retirement/sers/employers/defined-contribution-enrollments/

Search for the Employee

Once on the Savings Plans page, enter the employee ID and click the Search button.



Next, select the employee record you wish to enroll by clicking on the respective row.[2]

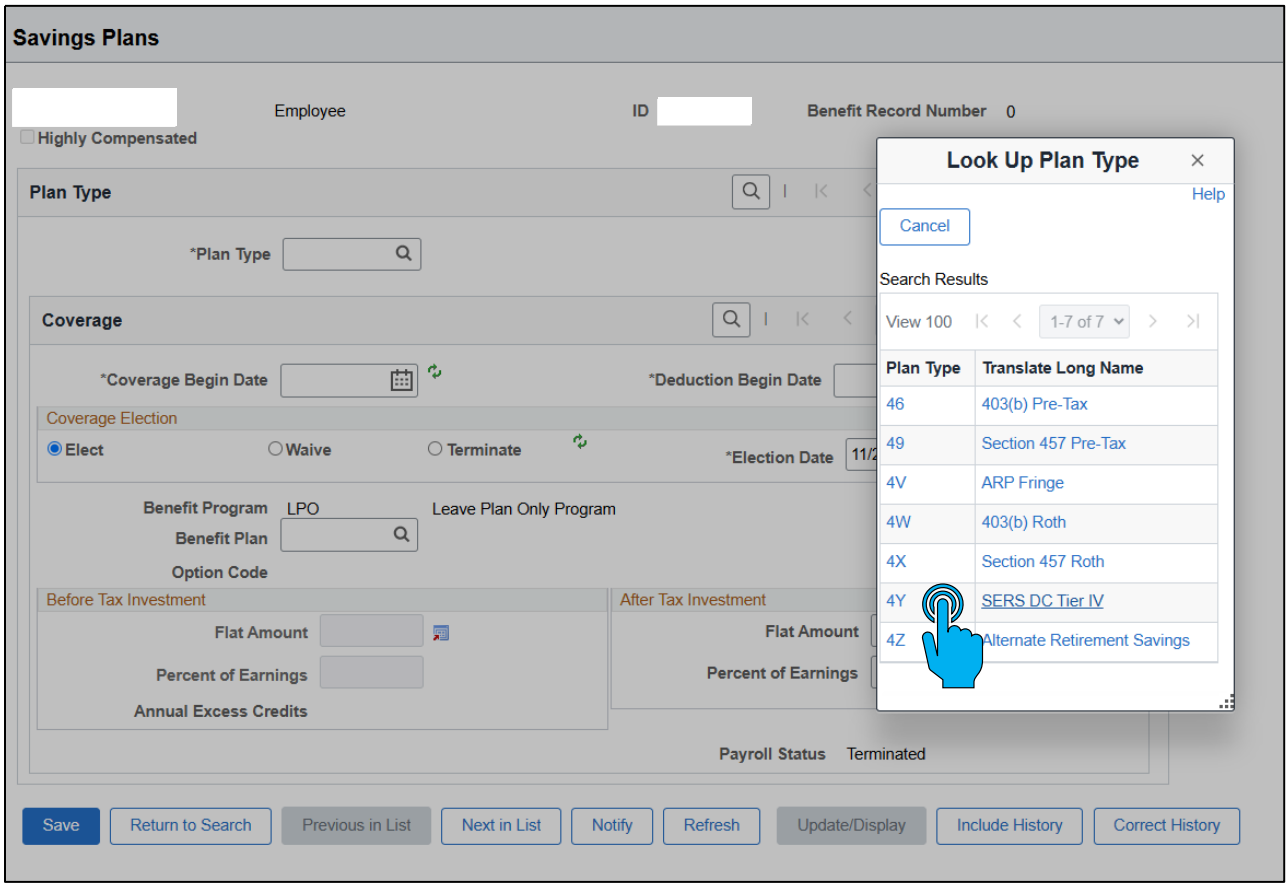


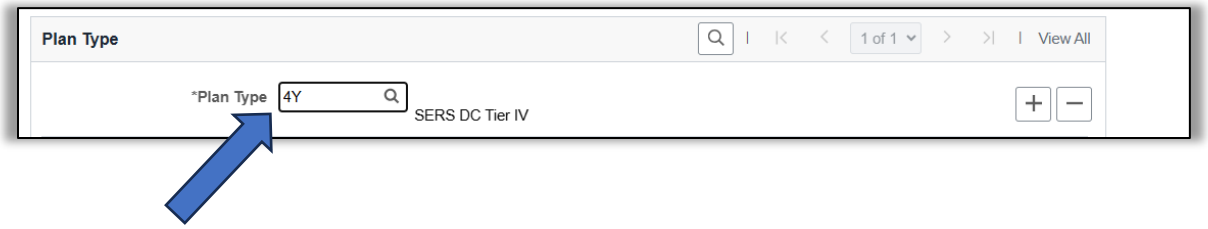
[2] **Note** for dually employed members, you will need to ensure ***every*** retirement eligible job record has been enrolled in ARP or SERS Tier IV DC.

Enter the Plan Type

Begin enrollment by entering the Plan Type. You may type the code directly into the Plan Type field or you may select from the entire list by clicking the magnifying glass icon in that field.

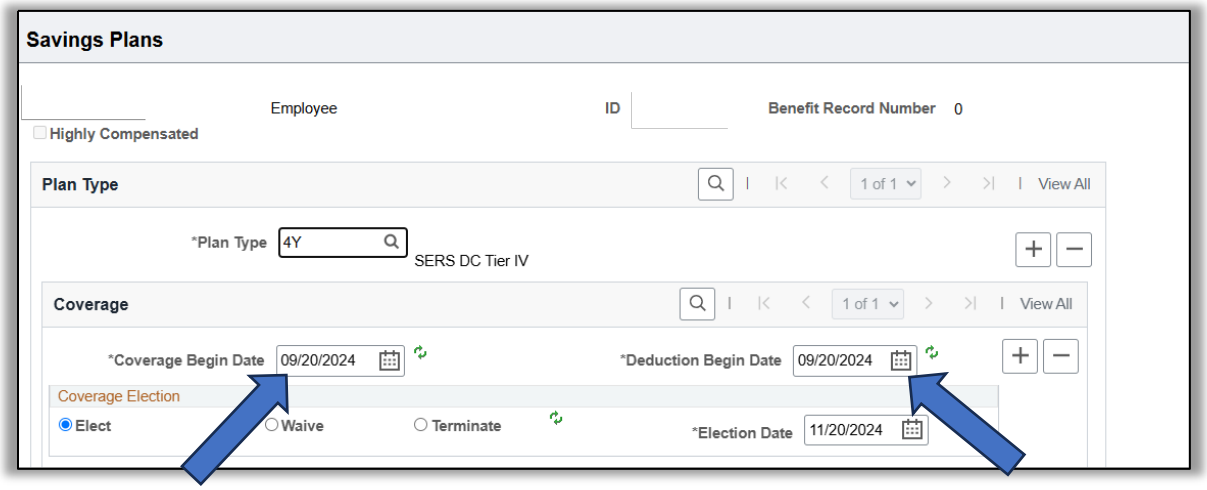
If selecting from the list, click on the respective plan to populate the field.





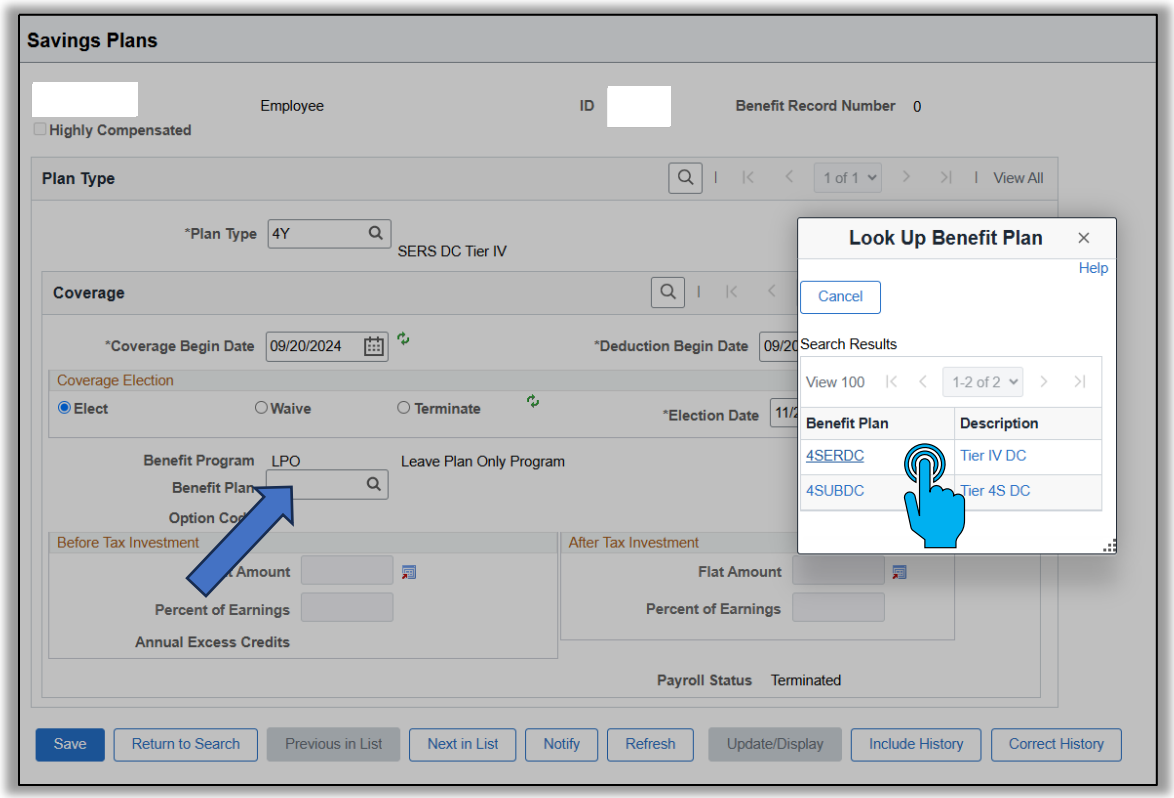
Verify Coverage Begin Date and Deduction Begin Date

The Coverage Begin Date and Deduction Begin Date will automatically fill with the first day of the current pay period.

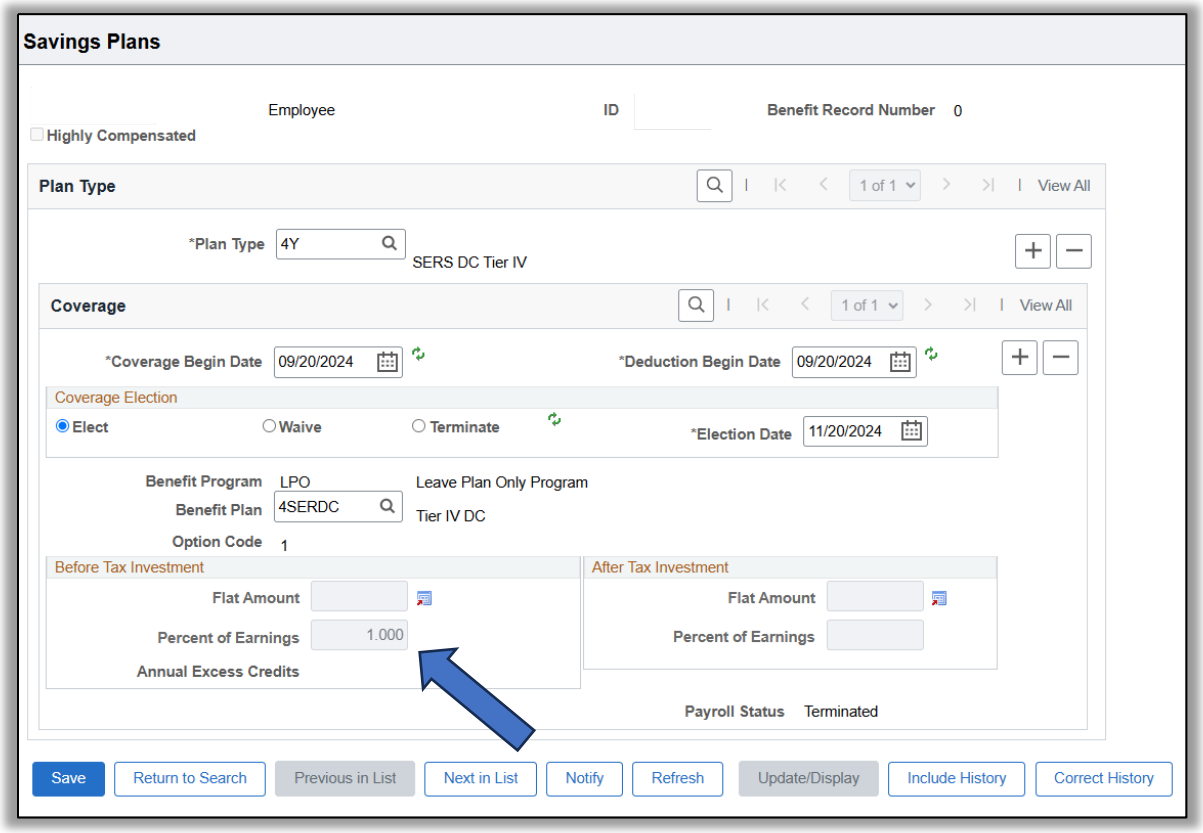


Select the Benefit Plan

Next, type the Benefit Plan into the corresponding field or click the magnifying glass icon to select from the entire Benefit Plan list.

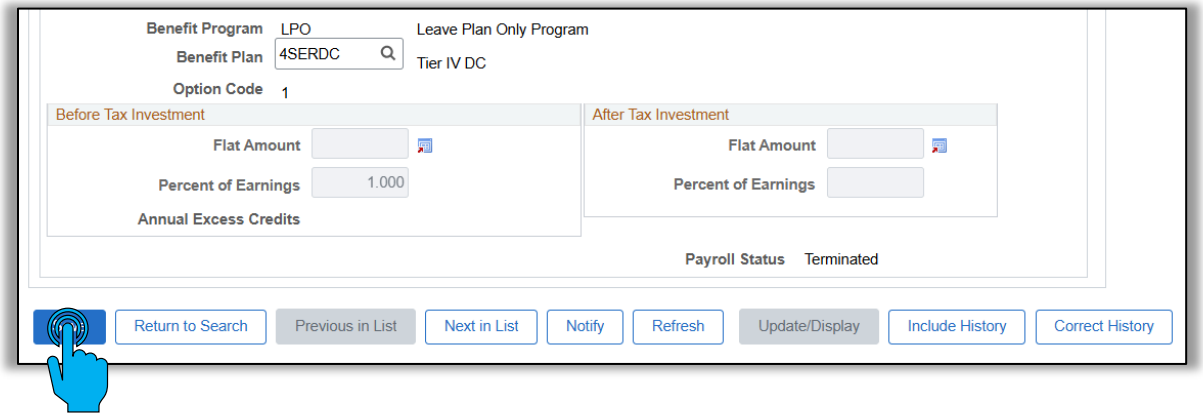


This will automatically fill the Percentage of Earnings field with the appropriate employee deduction. The employer deduction is not visible on this screen but will automatically process based on this enrollment.



Save the Changes

Lastly, click the Save button at the bottom left of the page to effectuate your changes.

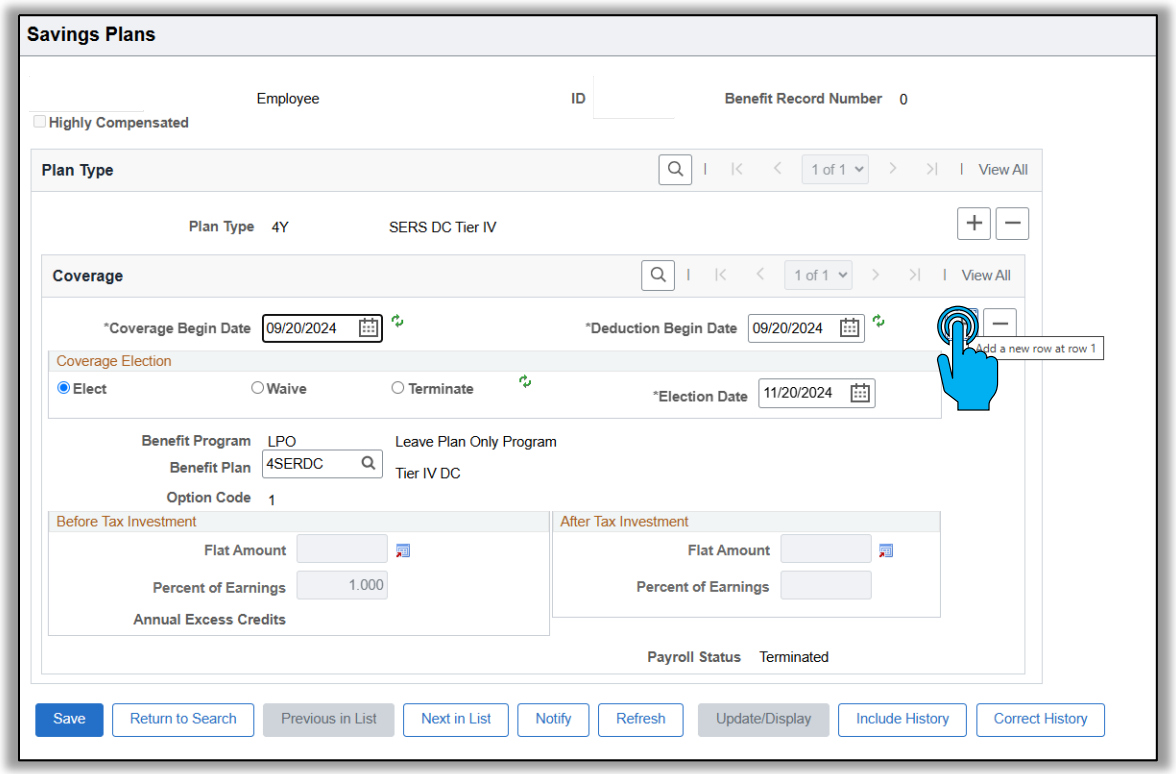


Congratulations! You have successfully enrolled the employee! Contributions will be deducted automatically by Core-CT in accordance with plan enrollment.

II. Terminating Enrollment

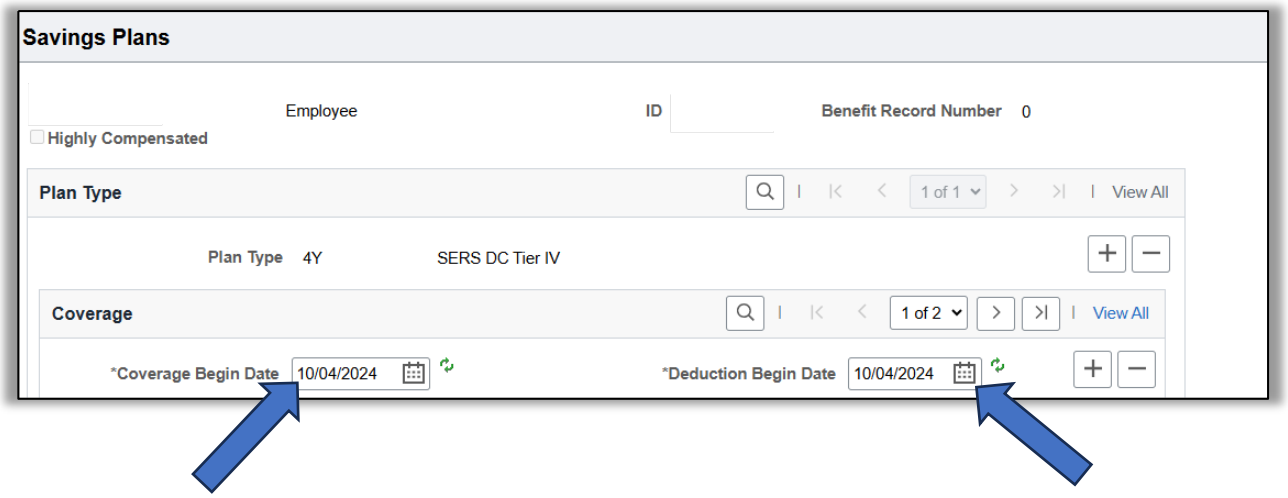
Add a New Row

Under the section marked Coverage, click the "+" button to add a new row.



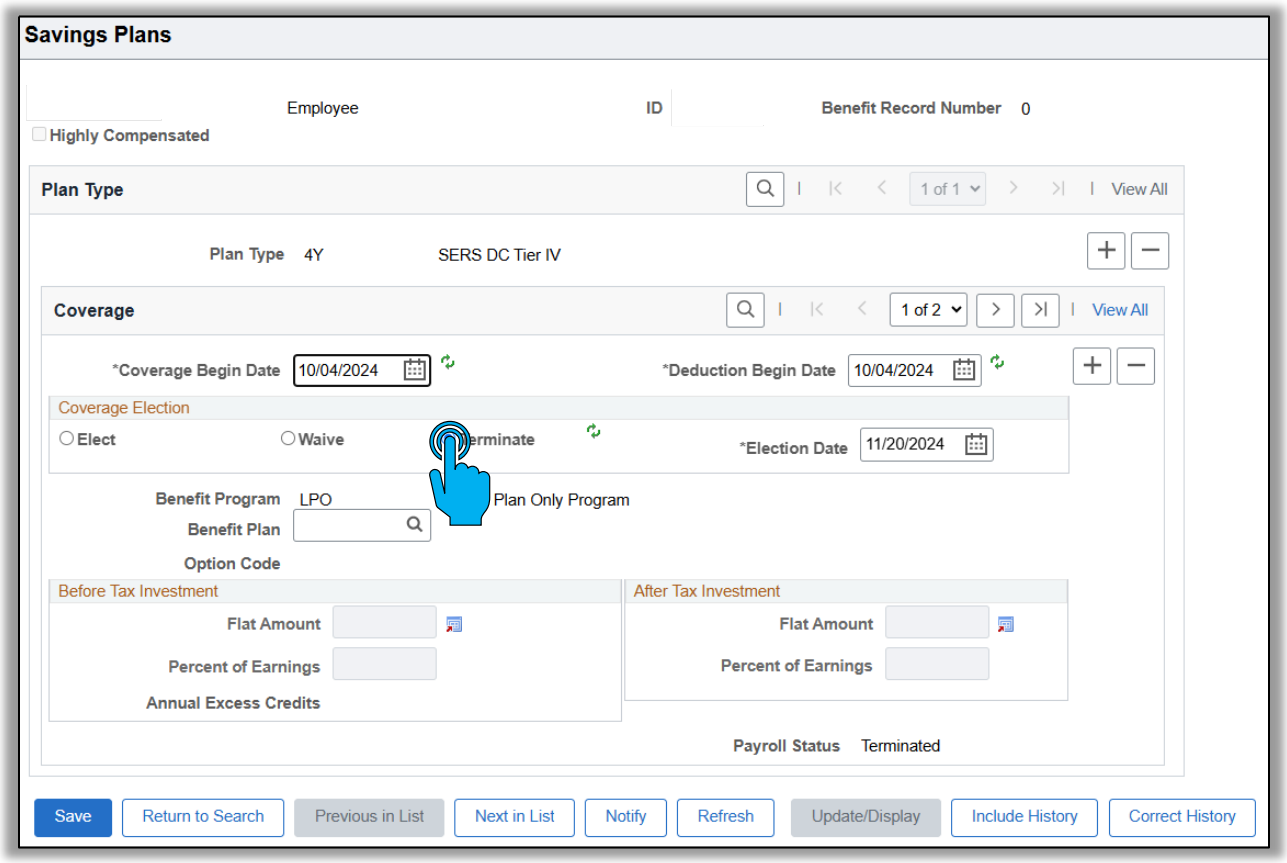
Verify Coverage Begin Date and Deduction Begin Date

The Coverage Begin Date and Deduction Begin Date will automatically fill with the first day of the current pay period. These dates should reflect the first day of the pay period in which the enrollment is to cease.



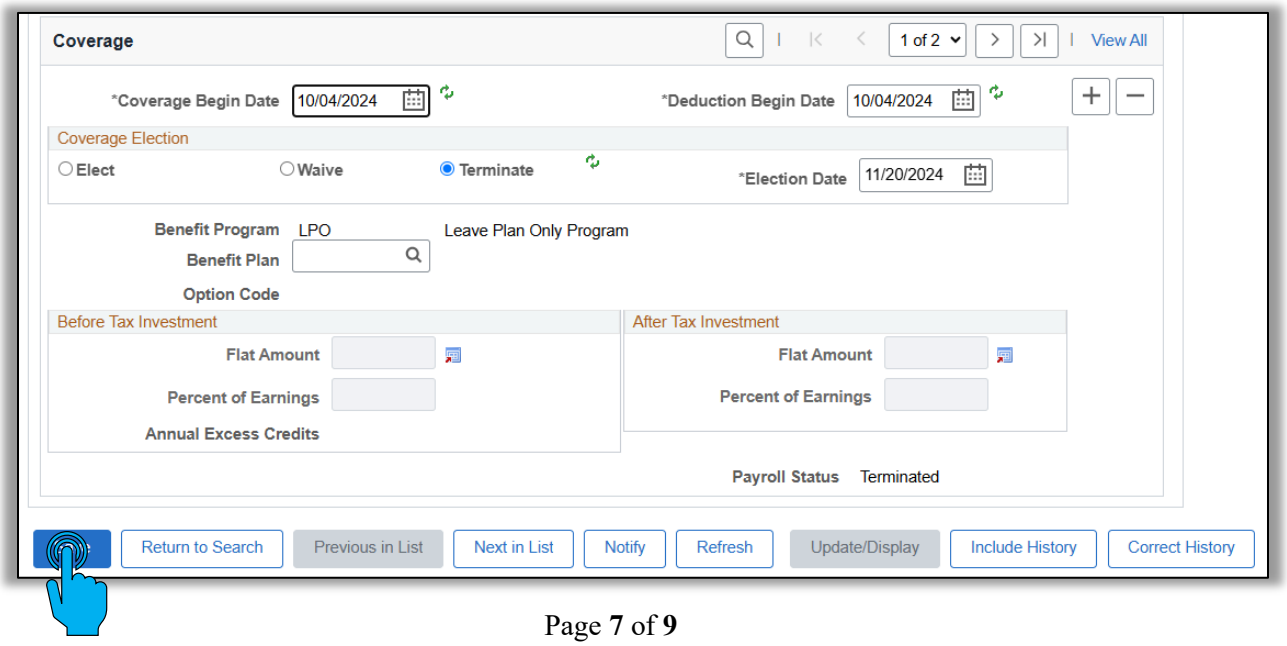
Enter the Coverage Election

Click the Terminate radio button.



Save the Changes

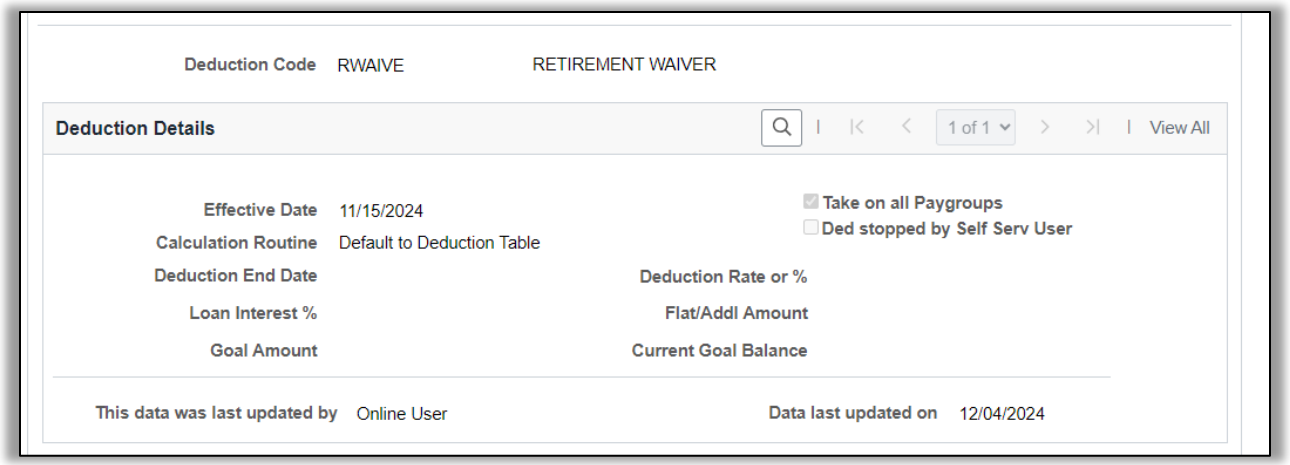
Lastly, click the Save button at the bottom left of the page to effectuate your changes.



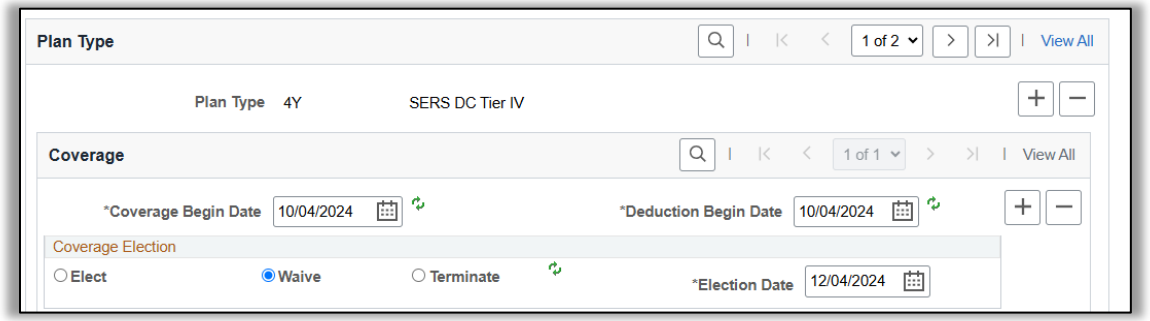
III. Waiving Retirement Plan Membership

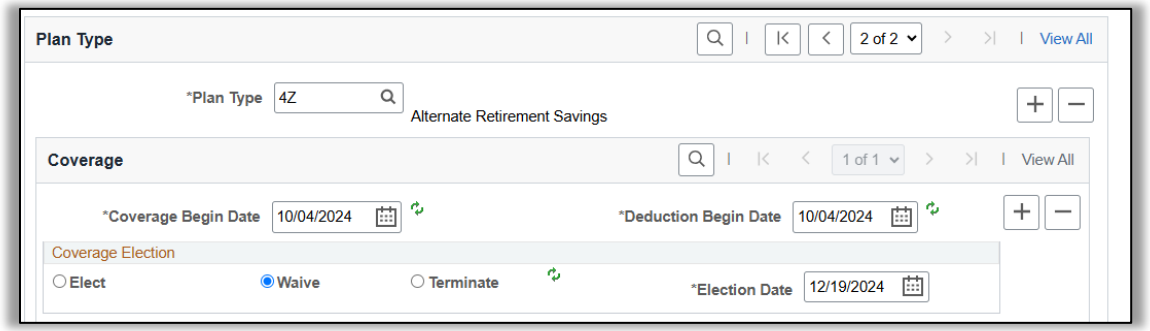
Employees that waive retirement plan membership must have the appropriate waiver deduction code entered into the Create General Deductions page.[3]

Employees **eligible for both SERS and ARP** who choose to waive retirement plan membership should be entered into Create General Deductions with the deduction code **RWAIVE**. This code must be entered on each waived record.



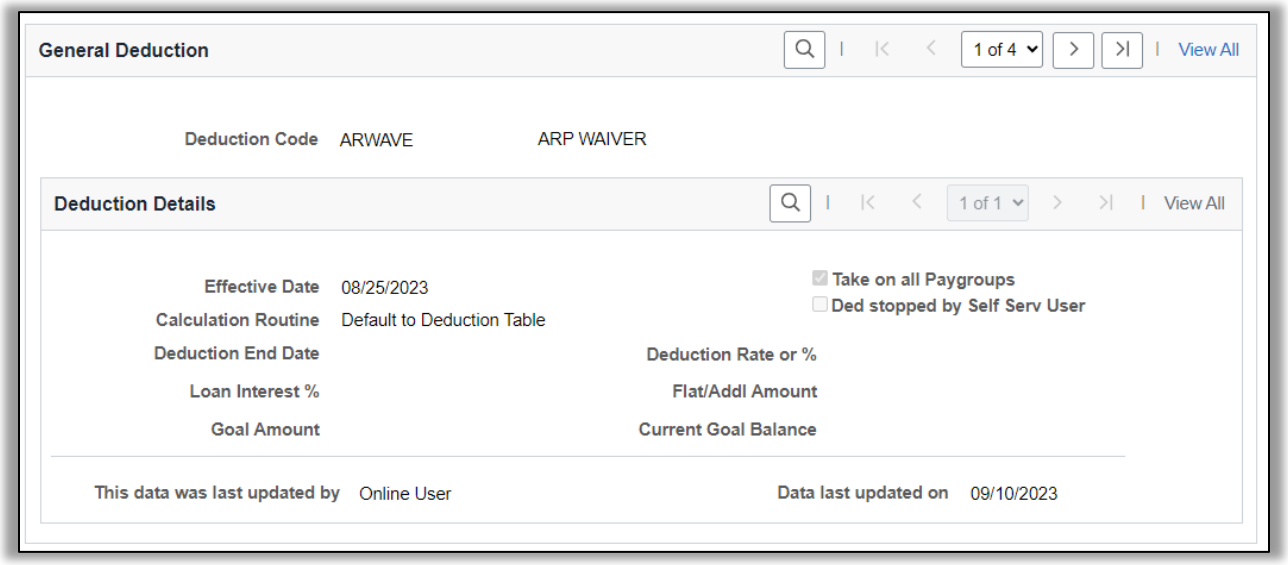
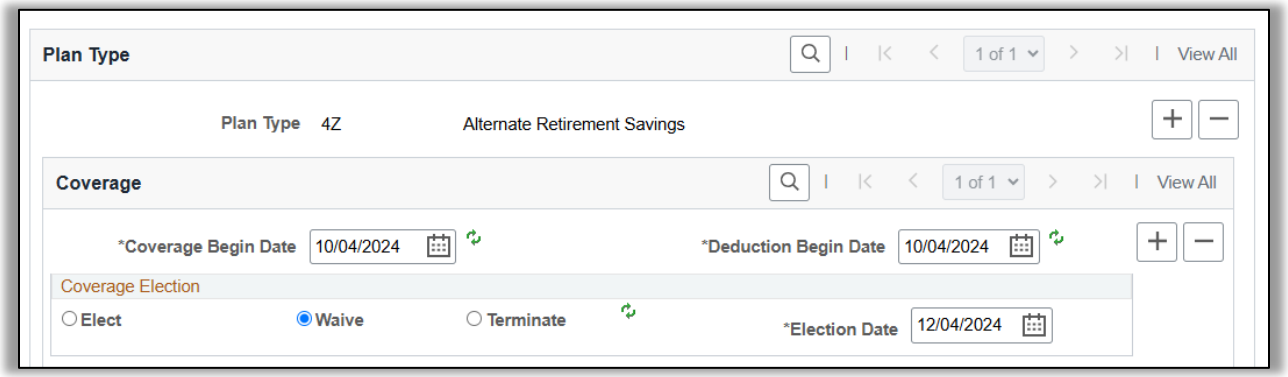
When this code is entered into Create General Deductions, the Savings Plans page will open a waiver entry for both Tier IV DC and ARP on each record with the RWAIVE code. You do not need to enter the waiver on the Savings Plans page directly.





[3] CORE-CT HRMS → Payroll for North America → Employee Pay Data USA → Create General Deductions

Employees who are **eligible for ARP only** and choose to waive, such as UConn Adjuncts, should have their waiver entered in Create General Deductions with the code **ARWAVE**. This code must be entered on each waived record.



When ARWAVE is entered, the Savings Plans page will open a waiver entry for ARP only since the employee did not have the option to elect or waive SERS. As with RWAIVE, there is no direct waiver entry required on the Savings Plans page.