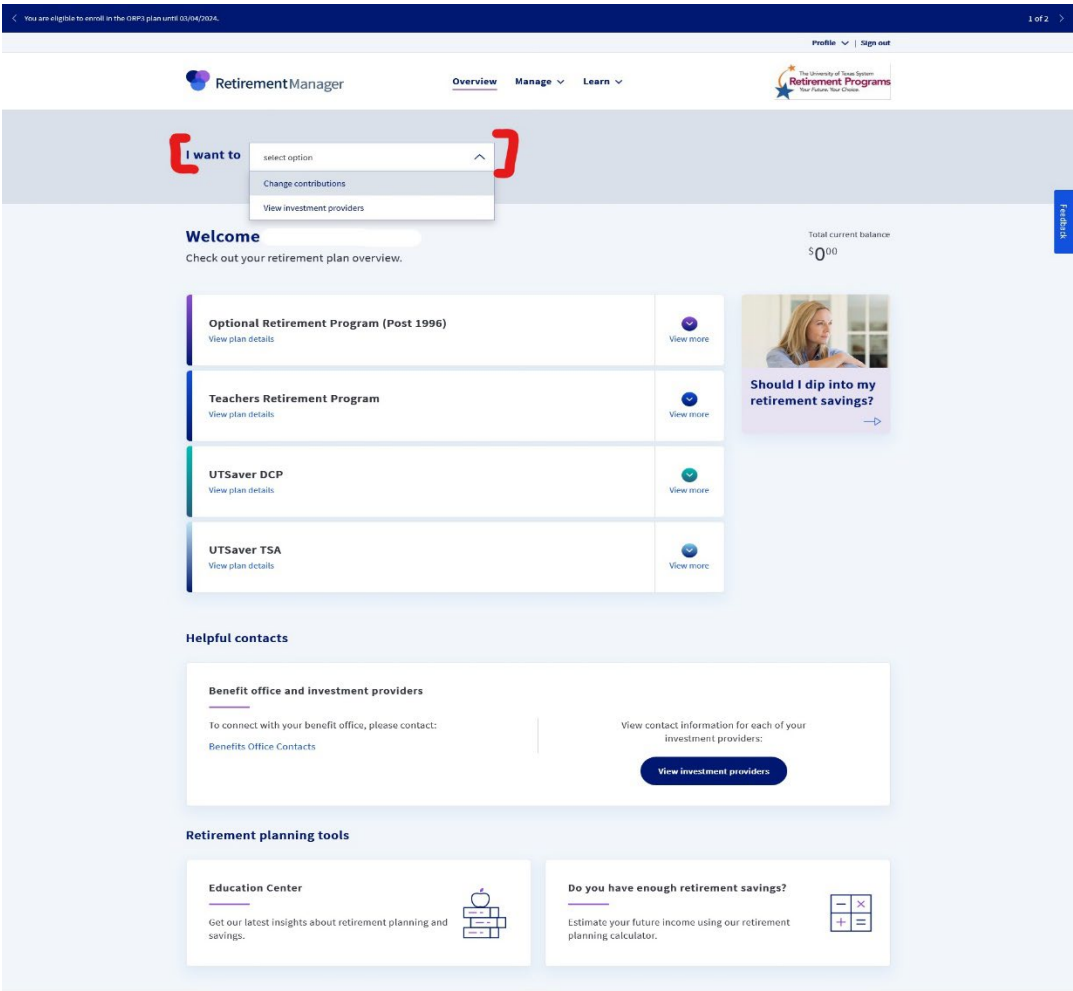


# Making your Payment Election on Retirement Manager

To complete your ORP enrollment, you must submit your signed and notarized TRS-28 form, and make your payment elections in UT Retirement Manager prior to your enrollment deadline. For instructions on how to complete your payment elections in UT Retirement Manager, please refer to the following.

Step 1: Click the “I want to Change Contributions” button (see below - boxed in red).



Step 2: Click the “Please select a Plan...” button and a drop-down menu will appear (see below). Select “Optional Retirement Program.”

The screenshot shows the Retirement Manager interface. At the top left is the Retirement Manager logo. At the top right is the University of Texas System Retirement Programs logo with the tagline "Your Future. Your Choice." Below the logos are "Overview" and "Welcome" links. A dark blue banner reads "To start or change your current contributions, select a plan:". Below this is a dropdown menu with "Please select a Plan..." selected. The dropdown list shows "Optional Retirement Program (Post 1996)", "UTSaver DCP", and "UTSaver TSA". To the right of the dropdown are links for "Disclaimer", "Security", "Privacy", "Terms of Use", and "Accessibility". At the bottom, a small text block states: "AIG Retirement Services represents AIG member companies - The Variable Annuity Life Insurance Company (VALIC), Houston, TX and its subsidiaries, VALIC Financial Advisors, Inc. (VFA) and VALIC Retirement Services Company (VRSCO). All are members of American International Group, Inc. (AIG)."

Step 3: An acknowledgment questionnaire should appear. Please answer the questions accordingly. Please know these questions are specific to the **Texas Optional Retirement Program (ORP)**. These questions are not regarding any voluntary retirement plans (e.g. DCPs, TSAs). If you have any questions, please reach out to our office, Benefits & Leave Management (email below).

The screenshot shows the Retirement Manager interface with the "Optional Retirement Program (Post 1996)" selected in the dropdown menu. The main content area is titled "ORP Acknowledgement for New Participants" and includes a "Start Over" link. It is divided into two sections: "Section I: To be completed by all ORP-eligible employees:" and "Section II: To be completed by ORP-eligible employees eligible for the first time:". Section I contains two questions with "Yes" and "No" radio button options. Question 1 asks if the user has ever been employed in a position eligible to participate in the ORP at another institution of higher education in Texas. Question 2 asks if the user has ever been a member of the ORP at another institution of higher education in Texas. Section II contains a paragraph of acknowledgment text and a "SUBMIT" button. Below the button, it states "Clicking SUBMIT confirms the above statements:". At the bottom, there is a link to "Optional Retirement Program Policy" and a link to "Overview of TRS and ORP" provided by the Texas Higher Education Coordinating Board.

Step 4: Once you submit the questionnaire, you will be asked for which paycheck you would like your ORP contributions to begin. Select the **next available** paycheck date.

Please note that Payroll confirms these contributions on the 14<sup>th</sup> of every month. For example, if you would like to enroll into the ORP for your 4/1/23 paycheck, you will need to make this contribution change on Retirement Manager by 3/14/23.

Otherwise, if you wait until 3/15/23 or after, your next available paycheck will be 5/1/23.

Retirement Manager

The University of Texas System  
**Retirement Programs**  
Your Future. Your Choice.

Overview Welcome

**To start or change your current contributions, select a plan:**

Optional Retirement Program (Post 1996) View Current Contributions

**Select the pay date you would like your contribution change to begin:**

Please select a paycheck date...

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Step 5 is on the next page.

Step 5: Please select your provider(s). You may allocate your contributions however you wish, as long as the total percentage equals 100%.

For example, if you select Fidelity as your sole provider, you will enter 100% in both the Employee and Employer sections. If you select two providers, you will enter 50% for each provider in both sections.

To reiterate, you may allocate your contributions however you wish, but, if you select more than one provider, you will need to work with each provider separately when it comes time to either select investments, withdraw or rollover your accounts.

Please click “Next” to finalize your financial provider(s) selection.



Overview

Welcome

**Optional Retirement Program (Post 1996): Contribution Change**

**Note:** To change your fund allocations, please contact your respective provider(s) directly. To transfer your existing fund balances between investment providers at this time, click [here](#).

**Employee**

Enter a percent (%) of 100 to indicate which provider(s) your contribution will be directed:

Investment Provider	Current %	New %
Corebridge Financial (formerly AIGRS)	0%	<input type="text" value="0%"/>
Fidelity Investments	0%	<input type="text" value="0%"/>
Lincoln Financial Group	0%	<input type="text" value="0%"/>
TIAA-CREF	0%	<input type="text" value="0%"/>
Voya	0%	<input type="text" value="0%"/>
<b>TOTAL</b>	<b>0%</b>	<b>0%</b>

**Employer**

Enter a percent (%) of 100 to indicate which provider(s) your contribution will be directed:

Investment Provider	Current %	New %
Corebridge Financial (formerly AIGRS)	0%	<input type="text" value="0%"/>
Fidelity Investments	0%	<input type="text" value="0%"/>
Lincoln Financial Group	0%	<input type="text" value="0%"/>
TIAA-CREF	0%	<input type="text" value="0%"/>
Voya	0%	<input type="text" value="0%"/>
<b>TOTAL</b>	<b>0%</b>	<b>0%</b>

**CANCEL** **NEXT**

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Step 6: Once you have made your provider selection(s), the following screen will show your confirmation of changes. Please input your email address to receive your confirmation and click the “Submit” button.

In this example, we selected only one provider. Your selected provider’s name will appear in the blank box.

Overview Welcome

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**Optional Retirement Program (Post 1996): Contribution Change**

*Review your Contribution Changes below. You must click "SUBMIT" at the bottom of the page in order to confirm and process your request.*

Your contribution changes made today will be effective as of your **01/01/2024** paycheck. If you wish to cancel these changes, you have until 11:59 PM Central Standard Time (CST) on **12/14/2023** to do so.

---

**Changes to Employee**

Your Employee contribution will be directed to:  100%

---

**Changes to Employer**

Your Employer contribution will be directed to:  100%

---

**Email Confirmation**

If you would like to receive email confirmation of your contribution changes made today, please enter your email address below:

Email Address:  Confirm Your Email Address:

Click "SUBMIT" to confirm and process your Contribution Changes.  
Click "CANCEL" to return to the Plan and Pay Date Selection Menu.

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If you have any questions, please contact Benefits & Leave Management at: [hurs-lm@austin.utexas.edu](mailto:hurs-lm@austin.utexas.edu).

For more information on our both our mandatory and voluntary retirement programs, please see our website’s page on [Retirement Programs](#).