

UT DALLAS BENEFITS ENROLLMENT INSTRUCTIONS

PREPARATION FOR ENROLLMENT

1. Access the email invitation to enroll sent to your UTD email. Contact a Benefits Administrator if you do not get the email within 3 weeks of hire.
2. Attend an employee orientation and review the [benefits information](#) provided to you so that you can make an informed decision.
3. Meet with a [Benefits Administrator](#) if you have questions or need assistance.
4. Have the following information available:
 - a. Dependent information (SSN, full name, date of birth)
 - b. Documents to prove dependent relationship (i.e. marriage license, birth certificate, proof of support)

STEPS TO ENROLL IN INSURANCE BENEFITS THROUGH

1. Go to [My UT Benefits](#) within 31 days of your start date or eligibility date
2. Choose 'The University of Texas at Dallas' from the dropdown list of campuses and click Select (may need to do this twice)
3. Login to UT Dallas SSO using your NetID and Password
4. If DUO is prompted, follow the authentication instructions
5. Then, click on Enroll Now! and follow the instructions, respond to questions and make your benefits selection.

POST ENROLLMENT FOLLOW-UP – YOU MUST DO THE FOLLOWING AS APPLICABLE

1. If EOI is required, complete the Evidence of Insurability online after you record your selections.
2. Don't forget to complete your beneficiary designation by completing the online designation and if needed, submit the [form](#) to BCBSTX.
3. Upload proof of dependent relationship (i.e. birth certificate, marriage license)

STEPS TO REVIEW AND ENROLL IN THE OPTIONAL RETIREMENT PROGRAM (IF ELIGIBLE)

You have 90 days from the date you first become eligible for the ORP to make your enrollment decision. If you are reclassified and/or assume a new job and become ORP-eligible for the first time after your initial employment date, the 90-day election period begins on the day your reclassification becomes effective. Please contact a [Benefits Administrator](#) if you have been offered ORP or have been an ORP participant from a prior Texas State Agency or Institution. Your election is irrevocable and you will be opting out of the TRS plan. The TRS employer contribution will not be transferred or distributed to you upon ORP election. **To enroll in ORP, follow these steps:**

1. Review your two mandatory retirement options carefully by reviewing the [ORP](#) and [TRS](#) information provided.
2. Complete the [ORP Acknowledgement Form](#) during your onboarding process. **Form is required even if you remain in TRS.**
3. Complete [TRS Form 28 \(Notice to Elect to Participate in Optional Retirement Program and/or Refund\)](#) and deliver it to the UT Dallas Office of Human Resources - Benefits Office at AD 10, Ste.3.108.
4. Choose your provider(s) from the currently [approved provider list](#). You may contact one of the UT Dallas [Provider Agent](#) for assistance.
5. Before your first ORP deduction, you must set-up an account with an approved vendor. Complete the appropriate provider application(s) to open an account(s) with that company online or mail all completed vendor applications to the designated address on the applications, as applicable.
6. Immediately after you set-up an account with an approved provider, log in to [UTRetirement Manager](#) and click on the ORP Enroll/Change page. If an ORP option is not displaying for you, contact a [Benefits Administrator](#) at benefits@utdallas.edu.
7. Contact a [Benefits Administrator](#) if you need assistance in enrolling.

STEPS TO ENROLL IN THE VOLUNTARY RETIREMENT PROGRAM (TSA, DCP AND ROTH)

Enrollment or changes cut-off date is 10th of each month for the next month's paycheck deduction. You may participate at any time.

1. Select the retirement plan you wish to contribute to. If you are unsure about which plan to choose, please see [Retirement Programs at a glance](#).
2. Choose a Provider from the list of approved Providers and follow their enrollment instructions to set up an account.
3. Log onto [UT Retirement Manager](#). Need help logging onto and using UTRetirement Manager? [View the Quick Reference Guide](#).
4. Click on the Enroll/Make Changes Tab (For the UTSaver TSA, ORP participant's limit may be reduced due to the ORP contribution).
5. Follow the instructions on the Enroll/Change screen.
6. Complete applications and beneficiary forms and return those directly to the Provider before contributions are deducted from your paycheck.

If this is your first time to use [UT Retirement Manager](#), select "I'm a New User" below the User ID box on the [UT Retirement Manager](#) home page.

Quick Links:

- [My UT Benefits](#)
- [UT System OEB Home Page](#)
- [UT Dallas Benefits Website](#)
- [Benefits Contacts](#)
- [Benefits Email](#)