

# **OPEN ENROLLMENT PROCEDURES for Employers**

## **Optional Retirement Plan for Higher Education Changing Providers during Open Enrollment**

1. In mid to late September the institution's Human Resource Office notifies participants that October is Open Enrollment for the Commonwealth of Virginia Optional Retirement Plan for Higher Education (ORPHE).
2. Participants interested in changing providers are given the Provider Change form and an enrollment kit for the provider to which they are changing.
3. If this is a new account with the provider, the participant must complete the enrollment and beneficiary forms in addition to the Provider Change form and return them to the Human Resources Office.
4. If the participant has an existing ORPHE account with the provider they are changing to (with the same institution), they do not need to complete a new enrollment application.
5. If the participant has an existing account with the provider (from an institution, outside of the ORPHE), they will need to complete a new enrollment form for Fidelity or TIAA-CREF.
6. If the participant already has an account with the provider they are changing to (with a different Virginia institution that participates in the ORPHE), a new enrollment form is not required.
7. Participants complete and sign the Provider Change form and the enrollment materials (if applicable) and return them to the Human Resource Office.
8. The Human Resource Office signs off on the change and notifies Payroll of the change.
  - a. **Fidelity**
    - i. Participants moving to Fidelity select their investments by going to Web site at [www.fidelity.com/atwork](http://www.fidelity.com/atwork) or by calling 1-800-343-0860.
    - ii HR sends original applications to:  
Fidelity Investments  
P.O. Box 770002  
Cincinnati, OH 45277-0090  
Postage-paid envelopes are provided in the enrollment kits.  
Any problems should be reported to:  
Joe Mendell  
Fidelity Investments Tax-Exempt Services  
82 Devonshire Street, MC3E  
Boston, MA 02109-3514
    - iii Forms may also be faxed to (877) 330-2476.

**Fidelity Investments ORP Enrollment forms must be noted with "Plan Number: 89755"  
Please reference the number on top of the enrollment form.**

b. **TIAA-CREF**

- i. Participants moving to TIAA-CREF select their investments using the paper form or by calling 1-800-842-2776.
- ii. HR sends original forms to:  
TIAA-CREF  
Attention: Enrollment Forms  
P. O. Box 1294  
Charlotte, NC 28201-9979
- iii. Forms may also be faxed to (800) 842-5916.

**TIAA-CREF ORP Enrollment forms must be noted with “Plan Number: 101850”  
Please reference the number on top of the enrollment form.**

9. Payroll makes the appropriate changes to reflect new election effective with the first pay period in January.

- a. CIPPS reporters – For the *12/25/11 TO 01/09/12* pay period, CIPPS reporters would make the change on HMCU1 prior to certifying the *12/25/11 TO 01/09/12* pay period, (which must be certified no later than *01/06/12*).
- b. Direct reporters – For the *December 25, 2011* pay period, direct reporters would make the appropriate change on their payroll system.

10. HR receives confirmation the change has been made

- a. Fidelity
  - i. HR can view or set-up a new account using PSW
  - ii. Remittance file sent electronically
- b. TIAA-CREF
  - i. Sends notice to HR that account is set up (if new)
  - ii. Remittance file sent electronically