



## Optional Retirement Plan for Higher Education

# Open Enrollment Procedures for Employers

### Steps for 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. For participants interested in changing providers, give them the Provider Change form and the enrollment materials for the provider they select.
3. Participants do not need to complete the enrollment process if they already have an account with the provider (i.e., DCP plan number 108732, Fidelity plan number 89755 or TIAA plan number 101850).
4. Participants must complete the enrollment and beneficiary forms if this is a new ORPHE account with the provider.
5. Participants return the signed Provider Change form and the enrollment materials (if applicable) to HR.
6. NEW: HR will send the Provider Change form to:

VRS  
 Attn: ORPHE  
 1200 E. Main Street  
 Richmond, VA 23219  
 Fax: 804-786-9718  
 www.orphe.varetire.org  
 (See next page for submitting enrollment forms.)

7. HR signs off on the change and notifies payroll, which forwards the form to VRS and retains a copy. The form serves as confirmation that contributions to the selected provider can begin.
8. Payroll makes the appropriate changes to reflect the new election effective with the first pay period in January.  
**CIPPS reporters** – For the December 25, 2016, to January 9, 2017, pay period, make the change on HMCU1 before certifying that pay period, which must be certified no later than January 6, 2017.  
**Direct reporters** – For the December 25, 2016, pay period, make the appropriate changes to your payroll systems.
9. HR remits the shell record to set up the account for Fidelity and TIAA; DCP is updated through myVRS Navigator.

<b>DCP   Virginia Retirement System (Record-kept by ICMA-RC)</b>	<b>Fidelity Investments</b>	<b>TIAA</b>
<ul style="list-style-type: none"> <li>• Remittance file sent electronically.</li> <li>• DCP account updated through myVRS Navigator.</li> <li>• HR should <i>not</i> remit shell record, but can view new accounts in EZLink, once set up.</li> </ul>	<ul style="list-style-type: none"> <li>• Remittance file sent electronically.</li> <li>• HR can view or set up a new account using Fidelity’s Plan Sponsor webstation.</li> </ul>	<ul style="list-style-type: none"> <li>• Remittance file sent electronically.</li> <li>• TIAA sends notice to HR when new account is set up.</li> </ul>

## Provider Selection Instructions:

<b>DCP   Virginia Retirement System (Record-kept by ICMA-RC)</b>	
Participants moving to DCP select their investments online or by phone >>	<ul style="list-style-type: none"> <li>• <a href="http://www.orphe.varetire.org/dcp">www.orphe.varetire.org/dcp</a></li> <li>• 1-VRS-DC-PLAN1 (1-877-327-5261), option 3</li> <li>• 1-800-669-7471 (TDD)</li> </ul>
HR sends original enrollment applications to >>	ICMA-RC Attn: Workflow Management Team P.O. Box 96220 Washington, DC 20090-6220
Report any problems to > >	1-877-327-5261
Your institution's DCP authorized signer may also fax forms to >>	202-682-6439

<b>Fidelity Investments</b>	
Participants moving to Fidelity Investments select their investments online or by phone >>	<ul style="list-style-type: none"> <li>• <a href="http://www.netbenefits.com/orphe">www.netbenefits.com/orphe</a></li> <li>• 1-800-343-0860</li> </ul>
HR sends original enrollment applications to >>	Fidelity Investments P.O. Box 770002 Cincinnati, OH 45277-0090  <b>IMPORTANT: Write "Plan Number: 89755" at the top of each Fidelity Investments ORP Enrollment form.</b>
Report any problems to > >	Fidelity Investments – Client Services Team <ul style="list-style-type: none"> <li>• <a href="mailto:TEMClientServices@fmr.com">TEMClientServices@fmr.com</a></li> <li>• 1-888-502-7526, option 1</li> </ul>
Your institution's Fidelity Investments authorized signer may also fax forms to >>	1-877-330-2476

<b>TIAA</b>	
Participants moving to TIAA select their investments online or by phone >>	<ul style="list-style-type: none"> <li>• <a href="http://www.tiaa.org/vrs">www.tiaa.org/vrs</a></li> <li>• 1-800-842-2252</li> </ul>
HR sends original enrollment applications to >>	TIAA Attn: Enrollment Forms P.O. Box 1294 Charlotte, NC 28201-9979  <b>IMPORTANT: Write "Plan Number: 101850" at the top of each TIAA ORP Enrollment form.</b>
Report any problems to >>	1-888-842-7782
Your institution's TIAA authorized signer may also fax forms to >>	1-800-842-5916