AGENDA

- Introductions
- Payroll & Self-Service TechWorks
- GLOBAL Human Resources Summary of Benefits
- Human Resource Business Partners & Employee Relations
- Benefits Orientation
- Disability
- Lifestyle Benefits
- Retirement Plans
- Benefits & Self-Service TechWorks (enrollment & change of life)
- Contact Information
GEORGIA TECH PAYROLL

Zach Rogers, Director Payroll
Angela Petty, Manager Payroll
• Pay Day
  • Last work day of the month via Direct Deposit
• TechWorks
  • Self Service Portal
  • Payroll and Compensation
• Advise departmental HR Representative or HR Business Partner of personnel changes
• Questions about pay? Pay.ask@ohr.gatech.edu
Payroll and Compensation Home

Payroll

View Paycheck
View your current and prior earnings statements online.

Direct Deposit
Review and edit your direct deposit accounts.

Voluntary Deductions
Review and edit your voluntary deductions.

Charitable Campaign
Review and edit Charitable Campaign.

Faculty/Staff Fund
Review and edit your Faculty/Staff Fund deductions.

Taxes

W-4 Tax Information
Review and edit your federal tax withholding exemption and amount.

G-4 Tax Information
Review and edit your Georgia state tax filing status.

State Tax Forms
Complete form and submit to payroll

W-2/W-2c Consent
Consent to receive W-2 form through Employee Self Service.

View and Print W-2 Form
View and Print your W-2 form from Tax Year 2010 to present

Print W-2 Prior to 2010
W-2s are available from 2001 to 2009
W-2/W-2c Consent Form

Submit or withdraw your consent to receive electronic W-2 or W-2c forms.

As of January 24, 2012 the time to consent to receive an electronic only form for 2011 has passed.

You must complete this consent form to receive an electronic W-2 form. If you do not submit a consent form or a withdrawal of consent form, the Payroll Department will process your year-end form and mail it to the address on file. After you submit your consent form, it will remain valid until you submit a withdrawal of consent.

If you have any questions please contact pay.ask@ohr.gatech.edu.

Your Current Status: Consent Withdrawn

Check here to indicate your consent to receive electronic W-2 and W-2c forms.

Submit Verify Identity

To verify identity, make sure your pop-up blocker is disabled. How to Disable Pop-Up Blocker
GLOBAL HUMAN RESOURCES

Doug Podoll, Director Global Human Resources
Lori Jones, Global HR Manager
GLOBAL HUMAN RESOURCES

Immigration Services
• Assist academic departments in sponsoring foreign national employees for temporary nonimmigrant visa classifications (B1s, H-1Bs, O-1s, TNs, and E-3s)
• Process petitions for permanent residence (green cards) for qualified faculty and researchers (EB1s, EB2s)

Foreign National Tax Services
• Responsible for tax compliance for payments made to Georgia Tech foreign national employees (faculty, researchers, staff, and students)

Global Mobility Support Services
• Provide immigration and taxation services to Georgia Tech employees working outside of U.S.
• Assist established campus in France, as well as new ventures in Latin America and Asia
• Support services include coordination of health and travel insurance

Contact Information
Foreign National Tax: nra.ask@ohr.gatech.edu
Global Mobility: globalmobility@ohr.gatech.edu
Immigration: immigration@ohr.gatech.edu
Web: ohr.gatech.edu/global
<table>
<thead>
<tr>
<th>Department</th>
<th>HR Rep/ Contact</th>
<th>Employee Relations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Services</td>
<td>Shundra Lee, Asst Dir-HRBP</td>
<td>Adrienne Richardson</td>
</tr>
<tr>
<td>College of Engineering</td>
<td>Lynda House, HR Director II</td>
<td>Adrienne Richardson</td>
</tr>
<tr>
<td>Provost/ President</td>
<td>Brandi Foley- Rodgers, HR Director I</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>Finance and Administration</td>
<td>Ravyn Blue, HRBP</td>
<td>Adrienne Richardson</td>
</tr>
<tr>
<td>Institute Communications</td>
<td>Travis Proffitt, HRBP</td>
<td>Adrienne Richardson</td>
</tr>
<tr>
<td>Development</td>
<td>Travis Proffitt, HRBP</td>
<td>Adrienne Richardson</td>
</tr>
<tr>
<td>Athletic Association</td>
<td>Kevin Cruse, HRBP</td>
<td>Adrienne Richardson</td>
</tr>
<tr>
<td>College of Computing</td>
<td>Pam Ruffin, HR Director I</td>
<td>Adrienne Richardson</td>
</tr>
<tr>
<td>Scheller College of Business</td>
<td>Season Lewis, HRBP</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>OIT</td>
<td>Brenda Franklin, Asst Dir-HRBP</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>College of Design</td>
<td>Norma Denuex, HR Director I</td>
<td>Derrick Morse</td>
</tr>
<tr>
<td>GTRI</td>
<td>Connie Masters, Director, Talent Mgmt, GTRI</td>
<td>Derrick Morse</td>
</tr>
<tr>
<td>GTPE</td>
<td>Valeria Roberts, HRBP</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>Ivan Allen College</td>
<td>Janice Russell, Dir-HR &amp; Finance</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>EI2</td>
<td>Greg Owen, HR Director I</td>
<td>Derrick Morse</td>
</tr>
<tr>
<td>College of Sciences</td>
<td>Dian Chung, HR Director II</td>
<td>Derrick Morse</td>
</tr>
<tr>
<td>Facilities</td>
<td>Jeffrey Maynard, HRBP</td>
<td>Derrick Morse</td>
</tr>
<tr>
<td>Library</td>
<td>Sharon Riehl, HRBP</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>Student Life</td>
<td>Easter Worden, HRBP</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>GTRC/OSP</td>
<td>Rex Welch, Asst Dir-HR</td>
<td>Karen S. Agbebiyi</td>
</tr>
<tr>
<td>EBB (Engineered Biosystems)</td>
<td>Carla Zachary, Dir-Business Operations</td>
<td>Derrick Morse</td>
</tr>
<tr>
<td>EVPR Interdisciplinary Research Institutes (IRIs)</td>
<td>Brandi Foley- Rodgers, HR Director I</td>
<td>Karen S. Agbebiyi</td>
</tr>
</tbody>
</table>
# HR Support Across Campus

## HR Contacts

Unit-level support for broad range of HR functions.

- Transactional functions as necessary:
  - PSFs/JETS/PRFs/Change add tools;
  - Time Tracking;
  - Payroll (Timesheets); and
  - Job postings (student/staff).
- First point of contact for employees with employment-related concerns.
- Advises and supports Performance management activities and processes.
- Provides support and guidance regarding workplace.
- Supports and partners on activities related to progressive discipline.
- Partners with GTHR to support recruiting and talent acquisition activities.
- Provides HR communication and serves as link to GTHR for unit.

## HR Business Partner or HR Director

Strategic advisors to unit senior leadership and management teams.

- Partners with unit leadership and HR to help increase employee and manager performance and advance interests of the unit within context of the Institute.
- Assists in development of strategic direction and collaborates with GTHR to present analysis and recommendations of human capital.
- Leads unit in full-scope performance management, partnering with HR to provide excellent resources and service.
- Conducts coaching and advising for leaders and managers within unit, and collaborates with HR to facilitate leadership development, including training.
- Develops and implements talent management strategy for unit.
- Leverages relationships and resources between the unit and GTHR, supporting balance of unique unit needs with consistency across the Institute.
- Facilitates change management.
- Oversight of and facilitator for unit’s HR programs and processes.
- Performs other HR- or business-related responsibilities as assigned based on unique unit needs or structure.
- Restructurings & Reorgs, Talent management, workforce planning, Succession planning, etc.

## Employee Relations Consultant

Subject matter experts and centralized support for employee relations and Institute policy development.

- Performs full scope of employee relations at a centralized level, partnering with HR Representatives and GTHR to manage alternative dispute resolution, progressive discipline, and investigations.
- Maintains a thorough understanding of all Institute and USG policies and support the Institute as a key resource for interpretation.
- Compiles, analyzes, and reports data relevant to employee relations, policy adherence and development, and employment compliance.
- Works with HR and units to develop HR-related process and procedure mapping, supporting consistency across units.
- Works with management to develop recommendations for proactive strategies related to employee relations trends and employment related risk management.
- Maintains and facilitates the Institute’s performance evaluation process.
- Consults, reviews, and advises on Performance Improvement Processes (PIPs), Investigations, terminations, suspensions, demotions, appeals, mediations, ADA, ADR, and EEO reporting.
Role:
To help ensure the effectiveness of your department and people by being a:

*Strategic Partner, Change Agent, Trusted Advisor, and Liaison*

<table>
<thead>
<tr>
<th>Strategic Partner</th>
<th>Change Agent</th>
<th>Trusted Advisor</th>
<th>Liaison</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring you have the people, capabilities, and processes in place to successfully execute on Department and Institute-wide priorities.</td>
<td>Support and lead through change from a people management perspective.</td>
<td>Talent Development and Engagement</td>
<td>Partner with specialized areas (COEs) in GTHR to effectively support human capital matters:</td>
</tr>
<tr>
<td>• Talent Management</td>
<td>• Organizational Planning</td>
<td>• Performance Management</td>
<td>• Talent Acquisition</td>
</tr>
<tr>
<td>• Succession Planning</td>
<td>• Engagement</td>
<td>• Workplace Trends</td>
<td>• Compensation</td>
</tr>
<tr>
<td>• Leadership Development</td>
<td>• Objective, fair, and equitable process</td>
<td>• Retention and Benefits</td>
<td>• Workplace Learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Policy and Ethics</td>
<td>• Payroll/Benefits</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Employee Relations</td>
<td>Leverage relationships and resources between units and GTHR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Training and Development</td>
<td></td>
</tr>
</tbody>
</table>
TEAM ER!

Courageous Advocate
Compassionate Culture Leader
Professional and Confidential Resource
Detail-Oriented and Knowledgeable
Accessible and Transparent

Employee Relations is the Heartbeat of the Institute
Ethicspoint.com

HR Contacts and Representatives in the departments across campus

Legal, Audit, and Title IX departments (Audit coordinates with USG hotline site as well)

Manager escalation

Employee direct contact
WELCOME TO GEORGIA TECH!
BENEFITS OVERVIEW
YOLANDA MCDANIEL, BENEFITS ADMINISTRATOR
• Benefits are a very important component of your total compensation package.

• The University System of Georgia (USG) offers a comprehensive and competitive benefits package designed to meet the diverse needs of our faculty and staff.

• You may choose from a variety of benefit plans including medical, dental, vision, flexible spending, disability and life insurance plans.

We are committed to making Georgia Tech a Great Place to Work!
ABOUT USG

Georgia Tech is a member of the University System of Georgia (USG), the state agency governing all 26 public institutions in Georgia.

USG sets goal, dictates general policy, administers benefits, and supplements funding for the state institutions. It is governed by the Board of Regents (BOR).

Your health and welfare benefits are provided through USG, which includes healthcare, dental, vision, and retirement plan options.
Benefit Plan Eligibility
Benefits Eligibility

- Be a regular faculty or staff employee who works at least 75% FTE- 30 hours per week.
Enrollment Period

30 Days
for Health Elections

60 Days
for Retirement Elections
Dependent Eligibility

- Eligible Dependents Include:
  - Legal spouse
  - Dependent children up to age 26
  - Dependent children over the age of 26
    (Only if deemed totally disable and rely on you for financial support)
Dependent Verification

Please upload the following to the OneUSG Connect Portal:

- Legal Spouse (including same sex)
  - Copy of Marriage Certificate
  - Proof of Joint Debt (ex: tax documents, mortgage or lease with both names)

- Children & Step Children
  - Copy of Birth Certificate

- Adopted Children or Children of Legal Guardianship
  - Court filed documents
Changes in Family Status
Life Events

- You must notify OneUSG Connect within 30 days of the event.
- Failure to do so timely will result in an inability to make changes until the next annual open enrollment period.

Annual Open Enrollment

- October 29 – November 9
- USG has a self service, online open enrollment process. Access through TechWorks.
- Benefits Fair – Wednesday, November 6th, Student Center Ballroom.

Life Events include:

- Marriage
- Divorce
- Birth, adoption or guardianship of child(ren)
- Change in employment status
- Loss of coverage
SYSTEM TRANSFERS

- **Notify** Georgia Tech Human Resources if you are transferring from a University System of Georgia Institution for service credit.

- **You will need letter of transfer** from your previous institution’s Human Resources department.
PRE-PAID BENEFITS

- Additional insurance premiums over last five paychecks of the academic year (January – May)

- Advance deduction for summer coverage on each paycheck

- Equal to an additional 40% of the regular monthly deduction for all elected benefits
Summary of Benefit Options
<table>
<thead>
<tr>
<th>Benefits Offered</th>
<th>Who Pays?</th>
<th>Pre-Tax / After-Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical and RX</td>
<td>USG &amp; Employee</td>
<td>Pre-Tax</td>
</tr>
<tr>
<td>Dental</td>
<td>Employee</td>
<td>Pre-Tax</td>
</tr>
<tr>
<td>Vision</td>
<td>Employee</td>
<td>Pre-Tax</td>
</tr>
<tr>
<td>Health Care &amp; Dependent Care Flexible Spending Accounts</td>
<td>Employee</td>
<td>Pre-Tax</td>
</tr>
<tr>
<td>Health Savings Account</td>
<td>USG &amp; Employee</td>
<td>Pre-Tax</td>
</tr>
<tr>
<td>Basic Life Insurance &amp; Accidental Death &amp; Dismemberment</td>
<td>University System of Georgia</td>
<td>After-Tax</td>
</tr>
<tr>
<td>Supplemental Employee &amp; Dependent Life Insurance</td>
<td>Employee</td>
<td>After-Tax</td>
</tr>
<tr>
<td>Accident &amp; Hospital Indemnity</td>
<td>Employee</td>
<td>After-Tax</td>
</tr>
<tr>
<td>Critical Illness &amp; Permanent Whole Life</td>
<td>Employee</td>
<td>After-Tax</td>
</tr>
<tr>
<td>Short Term Disability (STD)</td>
<td>Employee</td>
<td>After-Tax</td>
</tr>
<tr>
<td>Long Term Disability (LTD)</td>
<td>Employee</td>
<td>After-Tax</td>
</tr>
<tr>
<td>Retirement Plan (ORP &amp; TRS)</td>
<td>USG &amp; Employee</td>
<td>Pre-Tax</td>
</tr>
<tr>
<td>Supplemental Retirement Plans</td>
<td>Employee</td>
<td>Pre-Tax (Roth is After-Tax)</td>
</tr>
<tr>
<td>Legal/Lifestyle Benefits/ Identity Theft</td>
<td>Employee</td>
<td>After-Tax</td>
</tr>
<tr>
<td>Tuition Assistance</td>
<td>USG &amp; Georgia Tech</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Overview of USG Health & Welfare Plans
The Affordable Care Act requires all individuals to have health insurance coverage or pay a penalty.

- All plans meet the Affordability Requirement under the Affordable Care Act
- USG employees eligible for health insurance may not be eligible for a tax credit through the Health Insurance Marketplace created under the Affordable Care Act
- For more information, visit the Federal Health Insurance Marketplace website at [www.healthcare.gov/families](http://www.healthcare.gov/families)
USG offers four comprehensive medical/Rx plans:

1. Comprehensive Care
2. Consumer Choice HSA (High Deductible)
3. BCBS BlueChoice HMO
4. Kaiser HMO

Must work 30+ hours per week to be eligible.
Comprehensive Care

- Higher monthly premium; lower deductible
- $20 co-pay office visit/ $30 co-pay specialist visits
- $15 CVS Minute Clinic & Live Health Online
- Pay for coverage whether you use benefits or not
- You may contribute to a healthcare flexible spending account (FSA) to pay for eligible out-of-pocket expenses on a pre-tax basis; use-it-or-lose-it rule applies

Consumer Choice HSA***

- Lower monthly premiums; higher deductible
- Office visits subject to deductible; 80% in-network
- Pay for coverage you use and insurance payments start after you satisfy deductible
- You may contribute to a health savings account (HSA) and Limited Purpose FSA to pay for eligible out-of-pocket expenses on a pre-tax basis; unused $$ roll over from year-to-year

*** Not Eligible to J Exchange Visitor Scholars
Blue Choice HMO

- Limited to residents of Georgia
- $30 co-pay for PCP/ $60 co-pay specialist visits
  - $15 CVS Minute Clinic & Live Health Online
- To receive benefits, members must use doctors in the BlueChoice HMO network by selecting a primary care physician (PCP)
  - No referrals needed for chiropractor, dermatologist, or gynecologist
- Out-of-network coverage only available for emergencies
- Pharmacy benefits are through the CVS Caremark program which utilizes a large network of retail pharmacies

Kaiser HMO

- Limited to residents of Georgia
- $20 co-pay for office visits, $25 specialist visits
- To receive benefits, members must use Kaiser facilities or Kaiser affiliated providers
- Out of network coverage is only available for emergencies
- Pharmacy benefits are through the Kaiser Permanente pharmacy and must be part of the Kaiser Preferred formulary
Employees and dependents age 18 and older covered by a USG medical plan are required to certify whether they are a current tobacco user.

- A $75 tobacco surcharge will be added to your monthly premium if you use tobacco products and/or for each dependent.

- Tobacco use = Cigarettes, pipe or cigars, smokeless tobacco like snuff or chewing tobacco.

- Free smoking cessation classes and support are offered by Georgia Tech, BCBSGa and Kaiser.

- Once an employee or dependent is tobacco-free, a certification can be completed and the surcharge will be removed the first of the following month.

All USG campuses are tobacco free.
Health Savings and Flexible Spending Accounts
FLEXIBLE SPENDING ACCOUNTS (FSA)

Administered by Optum

HealthCare FSA
A HealthCare FSA can save you money on healthcare, prescription drug, dental, or vision expenses. The FSA includes other important features:

- For a list of eligible expenses, go to irs.gov/pub/irs-pdf/p502.pdf
- Annual contribution limit - $2,600

Dependent Care FSA
A Dependent Care FSA can save you money on dependent care expenses. These include day care and summer camps for children under age 13 and care for an elderly parent.

- You can contribute up to $5,000 a year or $2,500 if you’re married and file separate income tax returns.
- For a list of eligible expenses, go to irs.gov/pub/irs-pdf/p503.pdf

Plan Carefully

- Money left in your FSA (healthcare, dependent care of limited purpose is forfeited.)
An HSA is an individually owned, portable savings account that allows you to save for current or future qualified medical expenses on a tax-advantaged basis.

To participate in an HSA, you must:

- Be covered under a High Deductible Health Plan (HDHP);
- Not be covered by any other health plan that is not a HDHP;
- Not be currently enrolled in Medicare or TRICARE;
- Not have received medical benefits through the Dept. of Veteran Affairs during the preceding three months; and
- Not be claimed as a dependent on another person’s tax return.
- Not be a part of the J1 Visitor Exchange Program
HEALTH SAVINGS ACCOUNTS (HSA)

Administered by Optum

Health Savings Account (HSA)

If you are enrolled in the Consumer Choice HSA healthcare plan, you’re eligible to have an HSA. Unlike an FSA, money left in your HSA at the end of the year rolls over to the next year.

- You can contribute up to $3,450* (single) or $6,900* (family) a year.
- USG will match your contributions dollar-for-dollar up to $375 (single) or $750 (family) a year.

* Includes USG matching contributions

2018 HSA contribution limits:

- **Single:** $3,450 (or $3,075 net before employer match)
- **Family:** $6,900 (or $6,150 net before employer match)
- **Catch-up:** $1,000 for employees 55 or older
Must enroll as a new hire.

- Pledge an annual amount to be taken in equal increments each pay period for remaining months of calendar year
- Changes cannot be made to this election during the year
- Same FSA rules apply

If enrolled in both the HSA and LP FSA

- You’ll receive one Optum Bank debit card linked to both accounts
- Dental and vision expenses will be validated by LP FSA first, then through HSA
- Employee-funded account
Dental and Vision Plans
DENTAL & VISION BENEFITS

Dental options:
• Delta Dental Base
• Delta Dental High
• Delta Dental HMO

Networks:
• PPO - Base and High plans
• DeltaCare USA - HMO plan

Vision - EyeMed:
• Insight Network

Key features:
• One (1) eyeglasses frame every 12 months
• Frame and contacts available within same year
• Out-of-network coverage available
CAMPUS RESOURCES

Tech Dentistry
STAMPS Health Services
www.techdentistry.com or
404-733-2022
Delta Dental insurance accepted

Tech Depoe Eye Center
Student Center
www.depoeeyecenter.com
404-894-9533
Eyemed insurance accepted
Life Insurance and Disability Plans
Athena Jones, Senior Benefits Specialist
<table>
<thead>
<tr>
<th>Life Insurance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Life with Accidental Death &amp; Dismemberment</td>
</tr>
<tr>
<td>Employee Supplemental Life with ADD</td>
</tr>
<tr>
<td>Spouse Life</td>
</tr>
<tr>
<td>Child Life</td>
</tr>
<tr>
<td>Additional Accidental Death &amp; Dismemberment</td>
</tr>
<tr>
<td>Critical Illness</td>
</tr>
</tbody>
</table>
Provides you with 60% income replacement (tax free) should you experience a qualifying disability

**Short Term Disability**
- 14-day waiting period
- Maximum weekly benefit $2,500 up to 11 weeks
- Statement of Health not required for new employees
  - Enrollment at a later date will require statement of health
- Pregnancy Protection Act**

**Long Term Disability**
- 90-day waiting period
- Maximum monthly benefit $15,000 up to normal retirement age
- Statement of Health not required for new employees
  - Enrollment at a later date will require statement of health
- Pre-existing condition limitations
Disability Common Claims

- Pregnancy and delivery
- Car Accident
- Illnesses
## STD Calculation Example

<table>
<thead>
<tr>
<th>Monthly payroll</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rate:</strong> $0.291/$10 covered benefit</td>
</tr>
<tr>
<td><strong>Annual Salary:</strong> $56,000</td>
</tr>
<tr>
<td>$56,000/52 = $1,076.92 weekly covered salary</td>
</tr>
<tr>
<td>$1,076.92 \times 0.60 = $646.15 weekly benefit</td>
</tr>
<tr>
<td>$646.15 \times 0.291/10 = $18.80</td>
</tr>
<tr>
<td><strong>STD weekly benefit maximum = $2,500</strong></td>
</tr>
</tbody>
</table>

## LTD Calculation Example

<table>
<thead>
<tr>
<th>Monthly payroll</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rate:</strong> $0.266/$100 covered salary</td>
</tr>
<tr>
<td><strong>Annual Salary:</strong> $56,000</td>
</tr>
<tr>
<td>$56,000/12 = $4,666.67 covered monthly salary</td>
</tr>
<tr>
<td>$4,666.67 \times 0.266/100 = $12.41</td>
</tr>
<tr>
<td><strong>LTD monthly benefit maximum = $15,000</strong></td>
</tr>
</tbody>
</table>
LifeStyle Benefit Options
### Additional Benefits

- Accident & Hospital Indemnity
- Critical Illness & Permanent Whole Life
- Legal/Lifestyle Benefits/ Identity Theft
- Tuition Assistance
Retirement Plans

James Wallace, Retirement Program Manager, Human Resources
All employees of Georgia Tech must participate in one of two core retirement plans:

- Teachers Retirement System of Georgia (TRS)
- Optional Retirement Plan (ORP) [option for salaried, exempt only]

**Election must be made within first 60 days of employment**

If you do not make an election, you will automatically default into TRS plan

Mandatory retroactive contributions will be taken from first paycheck of eligible earnings if TRS is elected or defaulted

Encouraged to enroll well prior to deadline. Otherwise you may experience large deduction on paycheck or default to a plan not suitable for you.

**All employees are required to contribute designated, fixed amounts to plan**

Rollovers and transfers are not allowed

*Your core retirement plan election is irrevocable.*
# ORP & TRS Plan Attributes

<table>
<thead>
<tr>
<th>Plan Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Teachers Retirement System of Georgia (TRS)</strong></td>
</tr>
<tr>
<td>• Available to regular faculty, exempt and non-exempt staff</td>
</tr>
<tr>
<td>• Defined benefits plan</td>
</tr>
<tr>
<td>• Employee contribution is 6%</td>
</tr>
<tr>
<td>• Employer contribution determined annually by TRS</td>
</tr>
<tr>
<td>• 10-year vesting schedule</td>
</tr>
<tr>
<td>• 2% per year income replacement</td>
</tr>
<tr>
<td>• Disability retirement at 10 years of service, at any age</td>
</tr>
<tr>
<td><strong>Optional Retirement Plan (ORP)</strong></td>
</tr>
<tr>
<td>• Available to salaried and exempt employees only</td>
</tr>
<tr>
<td>• Defined contribution plan</td>
</tr>
<tr>
<td>• Employee contribution is 6%</td>
</tr>
<tr>
<td>• Employer contributes 9.24% under current policy</td>
</tr>
<tr>
<td>• Immediate vesting</td>
</tr>
<tr>
<td>• Three service providers: Fidelity, TIAA-CREF &amp; VALIC</td>
</tr>
<tr>
<td>• You may change vendors on a quarterly basis</td>
</tr>
</tbody>
</table>
Important! Failure to complete retirement election within 60 days from your hire date will result in an **irrevocable** default to the Teachers Retirement System of Georgia (TRS) plan.

**QUESTIONS:** retirement@ohr.gatech.edu
Supplemental Retirement Plans
Supplemental Retirement Plans

In addition to core retirement plans, Georgia Tech also offers 403(b) Tax Sheltered Annuity and 457(b) Deferred Compensation plans.

<table>
<thead>
<tr>
<th>Plan Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>403(b) Tax Sheltered Annuity</strong></td>
</tr>
<tr>
<td>• Service providers: Fidelity, VALIC and TIAA-CREF</td>
</tr>
<tr>
<td>• You may contribute up to $18,500 (additional $6,000 for age 50+)</td>
</tr>
<tr>
<td>• Enrollment and/or changes to your election allowed at any time (subject to payroll calendar)</td>
</tr>
<tr>
<td>• Roth 403(b) is available for after-tax contributions</td>
</tr>
<tr>
<td>• 10% early withdrawal penalty prior to age 59 ½ for traditional 403(b)</td>
</tr>
<tr>
<td>• 10% early withdrawal penalty prior to age 59 ½ for traditional 403(b), unless contributions made 5 years prior to distribution and age 59 1/2</td>
</tr>
<tr>
<td>• No age based required distributions</td>
</tr>
<tr>
<td>• Loan availability through all vendors</td>
</tr>
<tr>
<td><strong>457(b) Deferred Compensation Plan</strong></td>
</tr>
<tr>
<td>• Service providers: Fidelity, VALIC and TIAA-CREF</td>
</tr>
<tr>
<td>• You may contribute up to $18,500 (additional $6,000 for age 50+)</td>
</tr>
<tr>
<td>• Enrollment and/or changes to your election allowed at any time (subject to payroll calendar)</td>
</tr>
<tr>
<td>• Roth 457(b) is available for after-tax contributions</td>
</tr>
<tr>
<td>• Elections are effective the first of the month following enrollment</td>
</tr>
<tr>
<td>• No early withdrawal penalty prior to age 59 ½ as long as employment has ended or you retire</td>
</tr>
<tr>
<td>• Required distribution at age 70 ½</td>
</tr>
</tbody>
</table>
Georgia Tech offers access to two tuition assistance programs:

<table>
<thead>
<tr>
<th>Program Rules</th>
<th>Tuition Assistance Program (TAP)</th>
<th>Staff Tuition Reimbursement Assistance Program (STRAP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Requirement</td>
<td>6 months employment</td>
<td>12 months employment</td>
</tr>
<tr>
<td>Eligible College/Institution</td>
<td>Any USG college/institution</td>
<td>Any accredited non-USG college/institution</td>
</tr>
<tr>
<td>Credit Limits</td>
<td>Up to 9 credit hours/semester</td>
<td>Up to 6 credit hours/semester</td>
</tr>
<tr>
<td>Grade Requirement</td>
<td>Maintain C or better</td>
<td>Maintain C or better</td>
</tr>
<tr>
<td>Assistance Method</td>
<td>Waiver applied up front</td>
<td>Reimbursement up to Georgia Tech rate with grades and transcripts</td>
</tr>
<tr>
<td>Eligible Degree</td>
<td>Any degree except doctor or lawyer</td>
<td>Any degree except doctor or lawyer</td>
</tr>
</tbody>
</table>
Tons of discounts, perks and campus resources available to Georgia Tech employees:

- Two onsite daycare facilities
- Tech Dentistry
- Depoe Eye Center
- Monthly Benefits/Wellness Education Series
- Bank at Work Program
- FSEAP (Faculty & Staff Employee Assistance Program)
- Travel Discounts
- 529 College Savings Plan
- Will Preparation
- Software Discounts
- Cell phone, vehicle, and cable discounts
- USG Perks at Work
- Purchasing Power

More details at: [www.ohr.gatech.edu/additional-benefits](http://www.ohr.gatech.edu/additional-benefits)
On-site daycares (Bright Horizons)

- R. Kirk Landon Learning Center
- The Children’s Campus @ Georgia Tech
- [ohr.gatech.edu/work/life/childcare](http://ohr.gatech.edu/work/life/childcare)

Campus Recreation Center (CRC)

- Minimum three (3) month commitment
- $24/month payroll deduction
- [crc.gatech.edu](http://crc.gatech.edu)
How to Access OneUSG Connect Benefits
ELECT ONLINE OR OVER THE PHONE

Access the 
OneUSG Connect - Benefits Website

To access the website, login into Georgia Tech’s employee portal: TechWorks.

1. http://TechWorks.gatech.edu
2. Click the benefits icon:

You will automatically be redirected to the OneUSG Connect - Benefits website.

3. Click “New Hire Enrollment”
4. Follow the prompts as you make your selections
5. **Save & submit** your selections
6. Submit supporting documents and evidence of insurability (EOI) if necessary

Access the 
OneUSG Connect - Benefits Call Center

Allow a representative to assist you in selecting your USG benefits over the phone. Call the toll-free number below to begin.

1-844-5-USGBEN
(1-844-587-4236)
### SELF-SERVICE BENEFITS THROUGH TECHWORKS

#### Employees without GT Whole Life or Identity Theft:

<table>
<thead>
<tr>
<th>Benefits Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OneUSG Benefits</strong></td>
</tr>
<tr>
<td><strong>OneUSG Connect - Benefits</strong></td>
</tr>
<tr>
<td>OneUSG Support: 1-844-5USGBEN (1-844-587-4236)</td>
</tr>
<tr>
<td><strong>GT Benefits</strong></td>
</tr>
<tr>
<td>Retirement Savings Plans 403(b)/457(b)</td>
</tr>
<tr>
<td>Vendor Directory</td>
</tr>
</tbody>
</table>

#### Employees with GT Whole Life or Identity Theft:

<table>
<thead>
<tr>
<th>Benefits Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OneUSG Benefits</strong></td>
</tr>
<tr>
<td><strong>OneUSG Connect - Benefits</strong></td>
</tr>
<tr>
<td>OneUSG Support: 1-844-5USGBEN (1-844-587-4236)</td>
</tr>
<tr>
<td><strong>GT Benefits</strong></td>
</tr>
<tr>
<td>Retirement Savings Plans 403(b)/457(b)</td>
</tr>
<tr>
<td>Whole Life Insurance</td>
</tr>
<tr>
<td>Identity Theft</td>
</tr>
<tr>
<td>Vendor Directory</td>
</tr>
</tbody>
</table>

This is the grid under the Whole Life or Identity Theft Links:

<table>
<thead>
<tr>
<th>Benefits Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GT Benefits</strong></td>
</tr>
<tr>
<td><strong>Premium/Pay Period</strong></td>
</tr>
<tr>
<td>Unum - Whole Life Insurance</td>
</tr>
<tr>
<td>Legal Club - Identity Theft</td>
</tr>
</tbody>
</table>

[Return]
Healthcare
Consumer Choice HSA
You

Dental
Della Dental Base Plan
You, George Burdell, Missy Sue

Vision
EyeMed Vision
You

Well-Being

Your Health and Insurance Coverage

Change Your Coverage
Process or model a life event.

Your Spending and Savings Accounts (Optum)

Validate Your Personal Information
Please review your personal information to confirm that it is up to date.

Select a Beneficiary

Find a Doctor, Dentist or Hospital
GEORGIA TECH HUMAN RESOURCES

Contact Us
Visit: 500 Tech Pkwy.
open Monday through Friday, 8:00 a.m. to 5:00 p.m
Web: ohr.gatech.edu
Email: hr.ask@ohr.gatech.edu
Phone: 404-894-4847
Make an appointment!

Services
Benefits & Compensation
Employee Relations
Global HR
Payroll
Talent Acquisition
Workplace Learning & Prof. Development