

# Employee Self-Service: Report Outside Retirement Contributions

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This quick reference guide (QRG) is for employees to report tax deferred contributions to another employer sponsored retirement plan. Employees are responsible for ensuring contributions across all jobs stay within IRS limits. To report, complete the following steps.

## REPORT OUTSIDE RETIREMENT CONTRIBUTIONS

From the Workday home page:

1. Search and select '**Create Request**' in the search bar. Alternatively, you can select the Requests app from the global navigation menu and select Create Request.

The *Create Request* screen displays.

2. In the **Request Type** field, select "All > Report Tax Deferred Contributions to Another Employer Sponsored Retirement Plan".
3. Click **OK**.
4. Review the instructions and then answer all four required questions. The fourth question may populate a fifth question based on your response.

The screenshot shows a form titled "Report Tax Deferred Contributions to Another Employer Sponsored Retirement Plan". The form includes instructions for employees to report contributions, links to IRS limits, and two input fields for estimating contributions. The first input field is for a 401(k) plan, and the second is for a 457(b) plan. Both fields are marked as required. The form also has a "Submit" button, a "Save for Later" button, and a "Cancel" button. A Workday logo is visible in the bottom right corner.

**Report Tax Deferred Contributions to Another Employer Sponsored Retirement Plan**

FORM TO REPORT TAX DEFERRED CONTRIBUTIONS TO ANOTHER EMPLOYER SPONSORED RETIREMENT PLAN

Employees are responsible for ensuring retirement contributions from all employer sponsored programs across all jobs stay within the IRS limits. To learn more about the IRS retirement contribution limits and the UA System Retirement Plan, please review these resources below:

<https://benefits.uaasys.edu/media/1122/uaa-retirement-plan-2022.pdf>  
<https://benefits.uaasys.edu/media/2122/bucket-illustration-2022-ua.pdf>  
<https://benefits.uaasys.edu/retirement-plan/retirement-savings-plan/>

The IRS 402(g) tax deferred limit for 2023 is \$22,500 with an additional \$7,500 catch-up provision for employee's reaching age 50 by 12/31/2023.

**2023 IRS LIMITS**  
402(g) tax-deferred limit = \$22,500 (applies only to voluntary contributions; required contributions excluded)  
415c limit = \$66,000 (applies to all \$ in 403(b) required & voluntary employee contributions + UA contributions; but excludes \$7,500 age 50 catch-up)  
Max UA match = \$33,000 (not to exceed 10% @ pay period on first \$330,000 of compensation in the tax year)

I estimate that I have contributed or will contribute \$ \_\_\_\_\_ into a **401(k)/403(b)** retirement plan on a voluntary, tax-deferred basis to another Employer Sponsored Retirement Plan during the 2023 tax year which begins January 1, 2023.  
(Required)  
\* Exclude any mandatory, employer-required contributions. But include Roth 403(b) contributions.

I estimate that I have contributed or will contribute \$ \_\_\_\_\_ into a **457(b)** retirement plan to another Employer Sponsored Retirement Plan during the 2023 tax year which begins January 1, 2023.  
(Required)

**Submit** **Save for Later** **Cancel**

5. Click **Submit**.
6. The request will then route to the Benefits Partner and Payroll Partner to take appropriate action, if needed.