

EMPLOYER REQUIRED ACTION

Event	Provide Information	Load to Planwithease	Load to Common Remitter	Wire Funds	Process Forms	Keep Records
New Hires	<ul style="list-style-type: none"> Universal Availability Notice (UAN) RIC At-A-Glance 	Demographic file				
Each Payroll		Demographic file	Remittance file	To Common Remitter	<ul style="list-style-type: none"> Changes – RIC Form New Acct – RIC Form 	<ul style="list-style-type: none"> All RIC Forms Contribution limits
Employee Leaves Employment	Distribution Summary	Termination date Very Important!				
Annually	Send UAN to all employees (with W-2s)				Prepare W-2s	Date and delivery method of UAN

Reminders

- If an employee wishes to take a 403b distributions, direct them to: <https://das.iowa.gov/ric/educated-related-employees-ere/distributions-changes-ere>
- If you receive a completed form, forward to john.williams5@iowa.gov for processing (fax 515-281-5102).
- Monitor [IRS Annual Contribution Limits](#). It is the employer's responsibility to ensure contribution limits are not exceeded. See [Maximum Contribution Spreadsheet](#).

**If a participant cannot complete a transaction through planwithease, please have them contact us at 866-460-4692.*