

Basic Instructions to complete and sign fillable PDF forms

(For detailed instructions with screen shots, please see the link on the Business Services Resources website)

- Download the form to your computer
- Open the form in Adobe – make sure that it does not open in a web browser such as Edge or Google
 - If your form opens in the web browser do not begin to fill in the form. Close the web browser and go to your downloads folder to find the document.
 - Right click on the document and choose Open With, then open with Adobe Reader DC or Adobe Acrobat
 - If you do not have those choices, go to the Software Center on your computer and download Adobe Reader DC. *For assistance, please talk to IT. They should be able to help you download and set it as your default for pdf files.*
- Once it is opened in Adobe you should be able to fill in the information and digitally sign.
- To sign click in the signature box and follow the prompts for your digital signature.
 - If you have not set up a Windows Digital Signature, please do so at this time.
 - Make sure that you choose a Windows Digital ID, the other one will require a password and the Windows ID is available across all platforms.
- Before your signature is visible Adobe will ask you to save the form. Please save it with your initials so that you know it is the signed version.
- Once you have signed it you can email it to the next person who needs to sign it. If you are not sure who that is, send it to the Administrative Assistant in your Department.
 - For the digital signatures to work we need you to email the forms.
 - Please do not print and scan or hand carry them to the next person.

Please do not hesitate to reach out to me if you have any issues.

Thank you for your patience as we continue to work through this new way of doing things.

Sincerely,

Gayle Jones

Business Services

Data & Reporting Specialist

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TAX SHELTERED ANNUITY SALARY WITHHOLDING AUTHORIZATION

NAME OF EMPLOYEE

SOCIAL SECURITY NUMBER

I hereby authorize and direct the officers of Oak Ridge Schools to withhold as a salary reduction for Tax Sheltered Annuity purposes \$ _____ per check from my salary as agreed between me and _____
(**Name of Company**) and as stated on the billing from said company or organization for a retirement annuity to be purchased for my benefit from said company or organization beginning with the payroll to be **dated** _____; and I further authorize said officers to make payments on such retirement annuity to said company or organization according to the terms of said annuity contract; and I understand that in order for me to discontinue said withholding authorization it will be necessary for me to personally execute the “Tax Sheltered Annuity Cancellation Form”.

Signature: _____
Employee

Date: _____

Signature: _____
Financial Advisor

Date: _____

Company Name

Phone: _____

Signature: _____
ORS Finance Director

Date: _____