

Salary Reduction Agreement (SRA) steps to make a change to a current contribution or to set up a new contribution:

403(b) plans, often referred to as a TSA, is a tax-sheltered retirement savings plan. Omni is our third-party administrator of this program.

These steps must be done on the OMNI website, not sent to the RAC offices to be completed, or the change/enrollment will not be initiated.

You must first have an account with an approved service provider (list is on the OMNI website, on the USD 489 Plan Detail Page).

For new accounts you must complete the Employer Match Form – please print off the Employer Match form (available on the USD 489 website), complete the top portion and send it to the Payroll Office. NOTE: DO NOT add the employer match amount on Omni as a Salary Reduction Agreement (SRA). Submit to Payroll a completed Match form and a copy of your account information only.

Our Organization Page on the website explains our Plan Details which includes Participating Service Providers and Forms.

No one at USD 489 can sign any form that is authorizing a disbursement or withdrawal of your 403B money. This request MUST go thru OMNI, to make sure all compliance issues are addressed properly.

OMNI's Customer Service Number 1-877-544-6664

OMNI's website www.omni403b.com

1. First go to www.omni403b.com

Or use the direct link found on the USD 489 Web Site: usd489.com>Menu>Payroll Resources>403B Website Link

The screenshot shows the homepage of the Omni403b.com website. The browser address bar displays "omni403b.com". The website has a dark red header with the following elements from left to right: a "Financial Wellness Center" icon, the text "Our Response to the COVID-19 Pandemic", a "Select Language" dropdown menu, and a "Secure Portal Login" button. Below the header is a navigation menu with links: "> Employees", "> Employers", "> Advisors", and "> Track Forms". The main content area features a large blue banner with the text "New Guidance for the CARES Act" and "Take note of new guidance regarding the CARES Act." Below this is the "US OMNI" logo. To the right of the banner is a red box with the text "Important News" and "New CARES Act guidance CLICK HERE". Below the banner is a section titled "What's New at OMNI" with a row of four small images: a blue abstract graphic, a "COMING SOON! OMNI Webinar" graphic, a photo of Sarah Breiner with the text "OMNI's General Counsel, Sarah Breiner and Director of Remittance and Resident Services", and a photo of a woman with the text "Protect your employees."

2. Click on the Employees

This screenshot is identical to the one above, but with a large red arrow pointing to the "Employees" link in the navigation menu. The arrow is positioned over the "> Employees" link, which is the first link in the navigation menu.

3. Click on – “Your Plan Page” to find list of district approved providers.

Financial Wellness Center Our Response to the COVID-19 Pandemic Select Language Secure Portal Log

US OMNI > Employees > Employers > Advisors > Track Forms

- > Start | Change Contributions
- > Transaction Forms
- > Your Plan Page
- > Education
- > Employee FAQs

Take note of new guidance regarding the CARES Act.

US OMNI

What's New at OMNI

2020 IASBO Annual Meeting

MESSAGE FROM OUR CEO

SCASBO South Carolina Association of

4. Enter “KS” and “USD489 Hays School Dist.”

Financial Wellness Center Our Response to the COVID-19 Pandemic Select Language Secure Portal Login

US OMNI > Employees > Employers > Advisors > Track Forms

Plan Detail

Select an organization below for a complete listing of available 403(b)/457(b) providers, including information about available investment types, agent contact information, and online enrollment. After researching available investments, use the Salary Reduction Agreement to start, stop, or change your deduction.

Select your Organization:

KS USD 489 Hays School Dist. GO

5. This is the page where you will find a list all of approved district providers.

← → ↻ omni403b.com/plandetail/7904

Plan Details for USD 489 Hays School Dist., Hays KS

403(b)

Current Status: Active

Participating Investment Providers

Investment Types: ● Fixed Annuity (F) ● Fixed Index Annuity (FI) ● Variable Annuity (VA) ● Investment Advisory Service (RIA) ● Mutual Funds (MF) ○ Not Offered

	(F)	(FI)	(VA)	(RIA)	(MF)	Phone
American Fidelity Assurance Co.						1-800-662-1113
Ameriprise Financial/RiverSource						1-800-297-2012
Aspire Financial Services						1-866-634-5873
Fidelity Management Trust						
Global Atlantic Financial Group						1-800-533-7881
MetLife						
Midland National Life Insurance						1-800-732-8939
National Life Group (LSW)						
Pacific Life Insurance Company						
Putnam Investments						
ROTH - Aspire						1-866-634-5873
ROTH - MetLife						
ROTH - Midland National Life Insurance						

Start | Change Contributions

Transaction Forms

Employee

6. You are now ready to start your enrollment.

7. **Click on** – Start / Change Contributions

Our Response to the COVID-19 Pandemic [Select Language](#) [Secure Portal Login](#)

[Employees](#) > [Employers](#) > [Advisors](#) > [Track Forms](#)

[Start | Change Contributions](#)

> [Transaction Forms](#)

> [Your Plan Page](#)

> [Education](#)

> [Employee FAQs](#)

Employee

The combination of product neutral education together with provider-specific information will provide employees with knowledge and tools necessary to make educated decisions concerning their retirement savings. OMNI provides employees with independent and product neutral education about their 403(b)/457(b) retirement plans, as well as the benefits associated with contributing. General information regarding product offerings are available on the organization's plan page.

Why save with 403(b)?

✓ You do not pay income tax on contributions until you begin

It will bring you to this screen:

8. Select KS for our State

9. Type USD 489 for Employer Name and then select USD 489 Hays School Dist.

Financial Wellness Center

Our Response to the COVID-19 Pandemic

Select Language


Secure Portal Login

US OMNI

> Employees > Employers > Advisors > Track Forms

Start | Change Contributions

Your first step to bolster your retirement savings is to start contributing to your employer's 403(b)/457(b) plan(s). OMNI makes it easy to begin or change your contributions to your 403(b)/457(b) account. After you open an account with an approved investment provider in your employer's plan, simply select your employer's state and type in your employer's name below to take you to the Salary Reduction Agreement form(s) where you will be able to detail the amount to be deducted as well as the approved investment provider with whom you wish to participate.



Salary Reduction Agreement Forms for

KS

USD 489 Hays School Dist

GO

Frequently Asked SRA Questions

How do I contribute?

Your first step will be to contact a participating 403(b)/457(b) investment provider to establish your investment account. A list of participating investment providers for your employer is

10. Click GO and it will take you to the next screen.

11. Pick the 2nd option and follow the directions. You will need to fill out each of the 4 sections – Employer Information, Employee Information and Agreements and Acknowledgements. The next section can't be accessed until the previous one is completed.

Salary Reduction Agreement Forms for USD 489 Hays School Dist. Hays, KS

403(b)

A Tax Sheltered Annuity ("TSA") is an investment account that is set aside for your retirement (only), and is paid for with "pre-tax" dollars. A Custodial Account ("CA") is the group or individual custodial account or accounts, established for each Employee, by the Employer, or by each Employee individually, to hold assets of the Plan. Unless utilizing the catch-up provisions, your Maximum Allowable Contribution ("MAC") cannot exceed \$19500 (\$26,000 if age 50 or over) for 2020. Both TSA & CA receive tax deferred treatment.

☐ **!!New!! 403 (b) SRA Express Shortened Online Form**

This Salary Reduction Agreement Short Form is being offered by OMNI to streamline the process by which new participants may begin making payroll deductions into a single investment account

☒ **403(b) Online SRA Submission**

☐ **403(b) SRA PDF Downloadable Version**

Select a Form Option



12. Omni will then let Payroll know when your account has been verified or your requested change approved and the effective date.