

# **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).

If you are requesting the Employer Match – 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](http://www.omni403b.com)**

1. First go to [www.omni403b.com](http://www.omni403b.com)
2. Click on the Purple – Participants button - on the right-hand side of the page. You do not have user name or password to login, so ignore the top right-hand corner for the OMNI Online Secure Portal, that is for administrators only.

US OMNI

OMNI Online<sup>SM</sup> Secure Portal [Trouble Logging In?](#) | [Enroll Now](#)  
User: [redacted] Password: [redacted] [LOGIN](#)

Home Forms About Us Leadership Services News Contact Us

**Maximum Allowable Contribution Limits**  
**2018**  
[Click here to learn more...](#)

**Participants** Employers Advisors

I would definitely recommend Omni Group for your financial needs...

*"Attending the NNASBO Fall Conference I had the pleasure of meeting Scott Klotzbach with Omni Group. It was nice to meet such personable and professional staff to answer all your questions. I would definitely recommend Omni Group for your financial needs... Scott was quite a gentleman and a definite man of his word. I look forward to talking to him in the near future."*

**The OMNI<sup>®</sup> Group**  
403(b) and 457(b) Retirement Savings Plan Administration and Compliance Monitoring for Governmental and Non-profit Employers

Online Forms OMNI Support OMNI P3 Financial Wellness Center

It will bring you to this screen:

The screenshot shows a website interface with a navigation bar at the top containing links for Home, Forms, About Us, Leadership, Services, News, and Contact Us. Below this is a secondary navigation bar with 'Participants' (highlighted in green), 'Employers', and 'Advisors'. The main content area features a large image of three people (two women and one man) smiling and looking at a document. The word 'Participants' is overlaid in large white text on the image. On the left side, there is a sidebar menu with links for Plan Forms, FAQs, OMNI P3, OMNI Newsletter, What is a 403(b) Plan?, Why Save with 403(b), 403(b) Videos, and Calculators. Below the menu is a section titled 'Employer Plan Info.' with instructions: 'To view information specific to your employer, select your state then begin typing the name of your employer into the Employer Name field. When the name of your employer appears in the options area, click on its name to select it.' Below the instructions are two input fields: 'EMP STATE: Kansas' (with a dropdown arrow) and 'EMP NAME: USD 489 Hays Scho'. A 'Show Details' button is located below the EMP NAME field. A blue hand-drawn circle highlights the EMP STATE and EMP NAME fields.

3. Click on the EMP State drop down and **SELECT KANSAS**
4. Click on the EMP Name – start typing US – it will give you 4 choices – **USD 489** is the last one – select it
5. Click Show Details and it will take you to the next screen.

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

**403(b) Plan** Looking for help in learning about your investment options? [CLICK HERE](#)

Current Status: Active

### Participating Service Providers

#### Investment Types

*Mouseover investment type for definitions*

Fixed Annuity (F)    Fixed Index Annuity (FI)    Variable Annuity (VA)    Investment Advisory Services (RIA)    Mutual Funds (MF)

**Agent Info.** - Click icon for details   **Online Enrollment.** - Click icon for details

Product not offered

	(F)	(FI)	(VA)	(RIA)	(MF)	
American Fidelity Assurance Co.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact provider directly for Investment Types 1-800-662-1113
Ameriprise Financial Services, Inc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1-800-297-2012
Aspire Financial Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1-866-634-5873
Fidelity Management Trust Co.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact provider directly for Investment Types
Global Atlantic Financial Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact provider directly for Investment Types 1-800-533-7881
Great American Insurance Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1-800-438-3398 x17197
MetLife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Midland National Life Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact provider directly for Investment Types
National Life Group (LSW)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact provider directly for Investment Types 1-800-732-8939
Pacific Life Insurance Company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact provider directly for Investment Types
Putnam Investments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact provider directly for Investment Types
ROTH - Aspire	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1-866-634-5873

### Start or change your CONTRIBUTIONS

1. You must open an account with your selected service provider(s)
2. Complete and submit a Salary Reduction Agreement (SRA)

**Salary Reduction Agreement (SRA):**  
> [Online](#)   [PDF](#)

**Plan Transactions & Forms**

For assistance determining the proper service provider transaction form to submit for your situation, please review our [Transaction Instructions](#) page.

- > Death Claim
- > Disability
- > Distribution
- > Exchange
- > Hardship
- > Loan
- > Service Based Catch-Up Request

- > QDRO
- > Required Min. Distribution
- > Rollover
- > Service Credit
- > Transfer

- > [Online](#)
- > [PDF](#)

6. On the top right-hand side – under the forms Section – Salary Reduction Agreement (SRA) Click on **ONLINE**. It will bring you to the following screen:

## OMNI® 403(b) SALARY REDUCTION AGREEMENT FORM

**Step 1 of 3: Supply Information** | Step 2 of 3: Confirm Entries | Step 3 of 3: Submission Confirmation

- Please supply the information requested below.
- Read all agreements on this form before submitting.
- Fields having a red asterisk notation are required.

**403(b) Salary Reduction Agreement (SRA) For Tax Sheltered Annuities and Custodial Accounts**

**IMPORTANT NOTICE: Before You Sign, Read All Information on this form:**  
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 \$18000 (\$24000 if age 50 or over) for 2017. Both TSA & CA receive tax deferred treatment.

Please supply the information requested below. All fields marked with a red asterisk are required.

**Part 1: Employer Information**

\*Employer State:  \*Employer Name:  \*Date of Hire: (MM/DD/YYYY)

**Part 2: Employee Information**  
*Please select your Employer's State and Name before continuing.*

**Part 3: Contribution Information**  
*Please select your Employer's State and Name before continuing.*

**Part 4: Agreements and Acknowledgements**

7. You will need to fill out each of the 4 parts – Employer Information, Employee Information, Contribution Information, and Agreements and Acknowledgements. The next section can't be accessed until the previous one is completed.
8. Omni will then let Payroll know when the changes or account is approved and will be effective.