



Educational Services That Transform Lives

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Memorandum

To: Benefit Eligible Employees
From: Human Resources, Benefits HRBenefits@esboces.org
Date: 2024
Re: 403b and 457 Plans

If you are interested in opening up, or making a change to an existing, 403b and/or 457 retirement account(s), please follow these steps:

ESBOCES employees are advised to contact our third-party administrator (OMNI Group) if they want to set up a 403b and/or 457 retirement account. The OMNI Group manages BOCES' 403b and 457 plans for ESBOCES. All new enrollments and/or changes to existing accounts, must be done through OMNI.

Information and forms are on their website.

Please go to: <https://www.omni403b.com/>

From OMNI's home page, please follow these steps to get to ESBOCES home page,

Click on "Employees", then "Your Plan Page",

Complete both the State and Employer information boxes and hit "GO".

The "Plan Detail" page should appear for ESBOCES. There are two separate tabs- one for 403b plan information, and the other tab for 457 Deferred Compensation Plan information.

On the 403b tab, you will see the list of "Participating Investment Providers" you have to select from. Step 1- You will have to open your account directly with the "Participating Investment Provider" of your choice.

Step 2- After you receive confirmation from your Participating Investment Provider that your 403b account is open, you will need that information, because then you must complete the online "Salary Reduction Agreement" form in order for payroll deductions to occur and go directly into your account.

On the 457 Deferred Comp tab, please select the link to the 457 Deferred Comp option you wish to invest in. It will re-direct you to the NYS 457 Deferred Compensation Plan information website. ESBOCES' 457 Deferred Compensation Plan ID# is: 211251.

The online Salary Reduction Agreement Form must be completed when opening or changing elections for 403b and/or 457 plans. The SRA form can be found on OMNI's website. Complete the online SRA form, and submit it electronically to OMNI. OMNI will process the information and they will notify ESBOCES.

ESBOCES will then start up the payroll deductions- as applicable, per your authorization based on the Salary Reduction Agreement form you submit to OMNI. Or, if opening up the account without payroll deductions and only to shelter terminal leave pay, BOCES will be also be notified by OMNI.

Also, please be advised, you can open up a 403b and/or 457 retirement account any time. There are no deadlines, or open enrollment periods.

Any questions, please contact OMNI directly:

Local: [\(585.436.OMNI \(6664\)\)](tel:585.436.OMNI(6664))

Toll Free: [\(1.877.544.OMNI \(6664\)\)](tel:1.877.544.OMNI(6664))

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