MAKING CHANGES TO YOUR 403(b) or 457(b) ACCOUNTS ONLINE – NO PAPERWORK NEEDED

This procedure will allow you to start, stop, change, or resume contributions to your 403(b), ROTH 403(b), or 457(b) accounts. **YOU MUST ALREADY HAVE CREATED AN ACCOUNT AS AN FUHSD EMPLOYEE.**

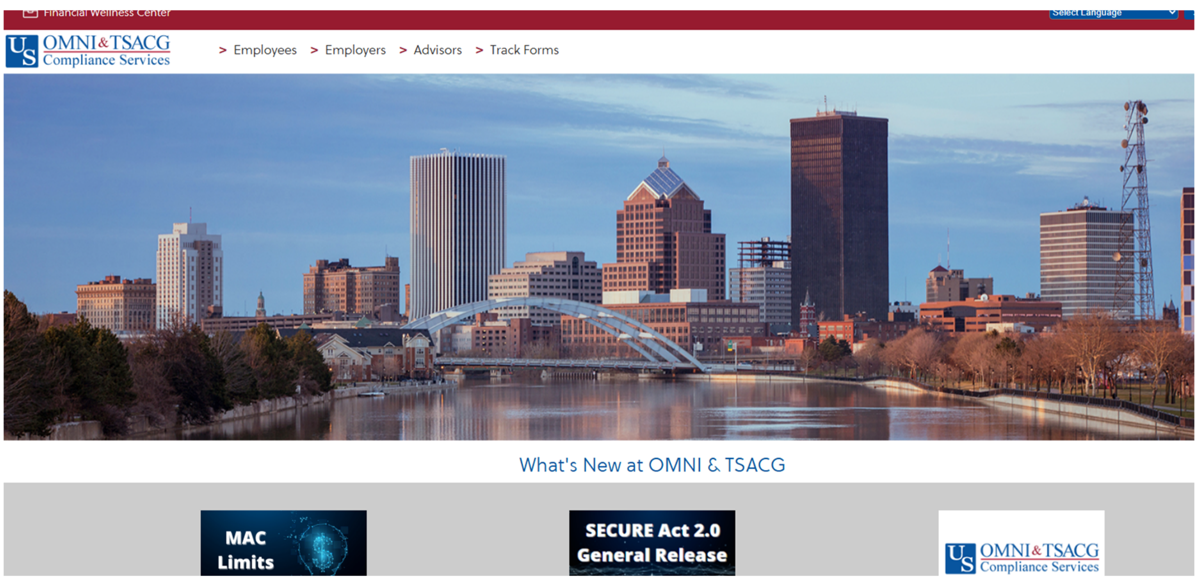
The enhanced functionality with the new system from OMNI allows you to go to their website and complete online forms to initiate any changes to your TSA account (403b, ROTH 403b, or 457b). Once the online form is submitted, it is uploaded directly to OMNI/TDS's approval system, where they will check to see if the account is valid, is open for contributions, and if your requested change will keep you in compliance with legal requirements.

You no longer need to download forms, complete and submit them to Payroll or Benefits to make changes to your contribution amount. You can now make use of the online functionality to save time and reduce mistakes.

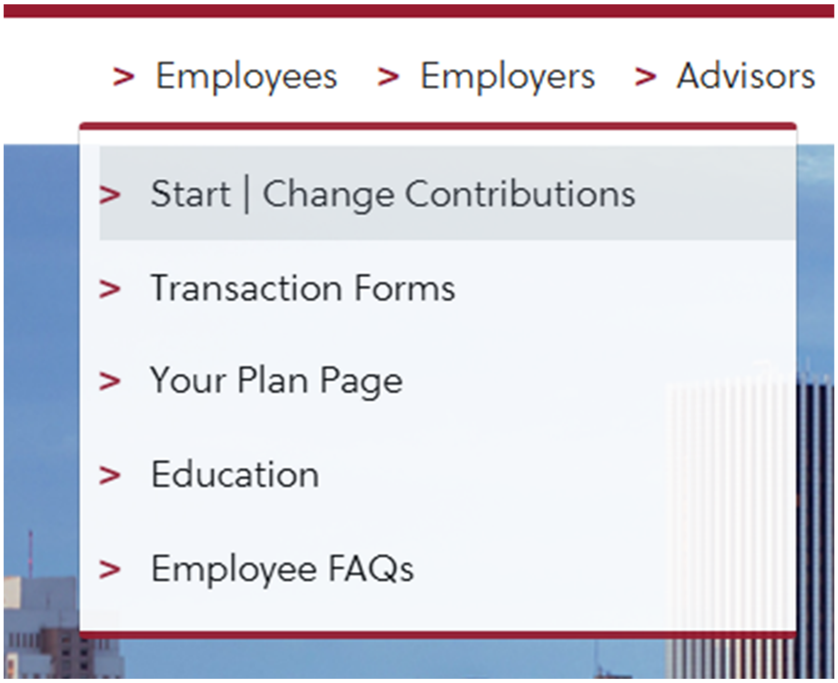
NOTE: You cannot contribute from your FUHSD check to any account that you had previously set up with a former employer. You can only contribute from your FUHSD paycheck to a TSA account that you created while you were already an FUHSD employee.

To access OMNI/TDS's online system, copy/paste the following web address to your browser:

https://www.omni403b.com/



From this page, hover your mouse over “EMPLOYEES” and then click on “Start \ Change Contributions”



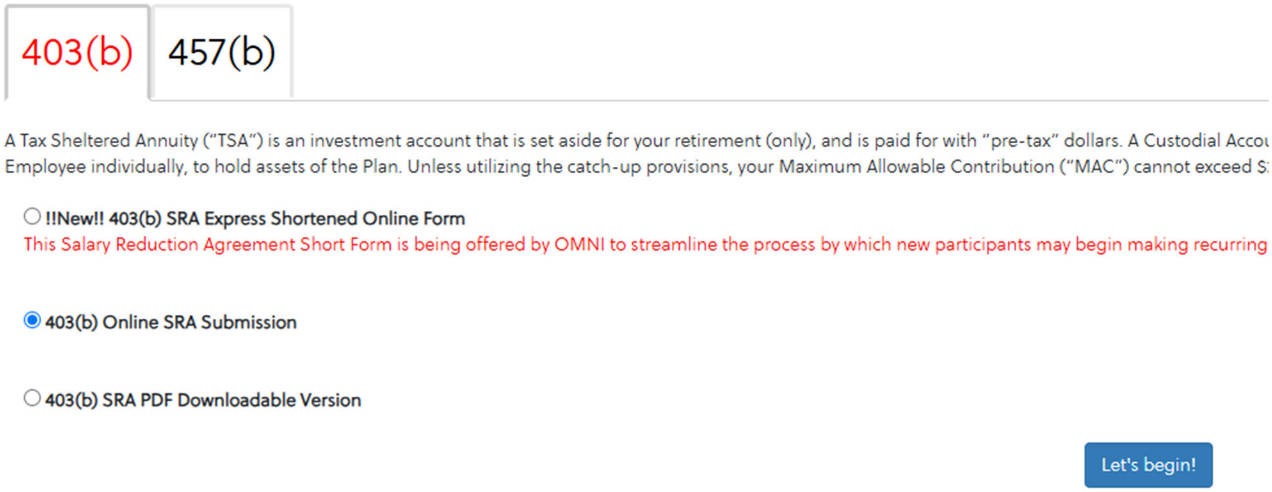
A new page will load.

Locate these fields:

Select the State of CA, type in FREMONT UNION HIGH SCHOOL DISTRICT, and click “GO.”

Select the appropriate tab for the type of account you are trying to update, 403(b) which includes ROTH accounts, or 457(b).

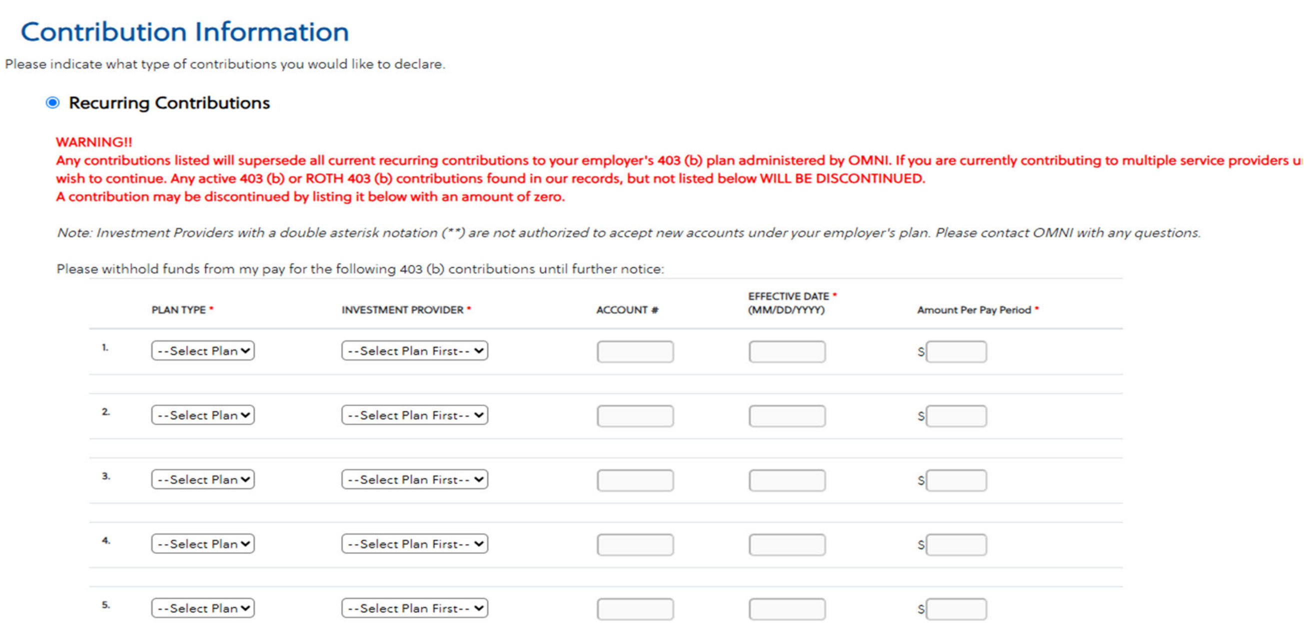
Once you have selected the correct tab, click the bubble next to “403(b) Online SRA Submission.” Then click “Let’s Begin!”



A new page will load.

The top of this new section is labeled “EMPLOYEE INFORMATION.” Fill in your personal details. Be sure to enter an email address that you check often, because if there is any issue with your submission, that’s how you’ll be notified. You will also need to know your hire date, which you can get from HR or Benefits, if you do not recall your start date.

Scroll down a little to the “CONTRIBUTION INFORMATION” section and click the bubble next to “RECURRING CONTRIBUTIONS.” When you click that bubble, the selection will expand to offer you more fields to fill in within a blank 5-row table:



Contribution Information

Please indicate what type of contributions you would like to declare.

Recurring Contributions

WARNING!!
Any contributions listed will supersede all current recurring contributions to your employer's 403 (b) plan administered by OMNI. If you are currently contributing to multiple service providers u
wish to continue. Any active 403 (b) or ROTH 403 (b) contributions found in our records, but not listed below WILL BE DISCONTINUED.
A contribution may be discontinued by listing it below with an amount of zero.

Note: Investment Providers with a double asterisk notation (**) are not authorized to accept new accounts under your employer's plan. Please contact OMNI with any questions.

Please withhold funds from my pay for the following 403 (b) contributions until further notice:

	PLAN TYPE *	INVESTMENT PROVIDER *	ACCOUNT #	EFFECTIVE DATE * (MM/DD/YYYY)	Amount Per Pay Period *
1.	--Select Plan	--Select Plan First--			$
2.	--Select Plan	--Select Plan First--			$
3.	--Select Plan	--Select Plan First--			$
4.	--Select Plan	--Select Plan First--			$
5.	--Select Plan	--Select Plan First--			$

Each row of that table represents a different account, so if you only have one 403(b) account, or one 457(b) account, then you will only update the first line.

SPECIAL NOTE TO THOSE WITH TWO OR MORE 403(b) / 457(b) ACCOUNTS: *If you have 2 or more 403(b) accounts, or if you have 2 or more 457(b) accounts, you will need to list all of the accounts you have for that type into that table, and state what you want the contribution to be for ALL of them, even if you're not trying to update them. You must still re-state the same existing contribution for the accounts that do not wish to change. If you fail to mention ALL of your 403(b) accounts, or ALL of your 457(b) accounts when you fill out this section, then OMNI/TDS will assume that you want to STOP contributions to any accounts that you failed to include in this 5-row table. Every new SRA form completely supersedes every previous SRA form that you have filled out.*

So make sure to include ALL of your 403(b) accounts, or all of your 457(b) accounts when you fill out his page, including any that you're not planning to update. If you don't list it and include a contribution amount, the contributions to that account will be stopped automatically.

Set the lines as follows (line 1 only for single accounts, or multiple lines for those with multiple accounts):

- Plan Type = 403(b), or ROTH 403(b), or 457(b), depending on your account type.
- Investment Provider = The name of your investment provider for that account. (i.e. Equitable, Fidelity, Vanguard, etc).
- Account # = If you have an account number for that account, enter it here. Otherwise enter your SSN in this spot.
- Effective Date = If you are filling this out between the 1st and 15th of the month, use the current date as your "effective date." But if you are filling out your SRA between the 16th and last day of the month, then it's too late to make payroll for that month, so you should use the first day of the FOLLOWING MONTH as your "effective date."
- Amount Per Pay Period = How much would you like deducted from each regular payroll check? It will only deduct during your regular work months, so 10 month employees get 10 deductions per year, 11 month employees get 11 deductions, and so on.

Scroll to the bottom of the page, re-enter your SSN, and click CONTINUE.

The next page will let you review your submission before submitting, and then complete your submission with one last "SUBMIT" button.

And that's it! You can check in with Benefits after the 20th of the month to see if your contribution was approved for the end of that same month or not. YOU ARE DONE!