OMNI Online SRA Completion Instructions

The Omni Salary Reduction Agreement (SRA) form must be completed by the last day of the month prior to the month you wish the change to take effect. For example, there is a July 31st deadline for changes to be effective on your August paycheck. This process is only necessary for 403b, 403b Roth and 457 Tax Shelters, if you wish to contribute to the Persi Choice 401K, please complete the Persi Choice form available on the Employee Online website and submit it directly to the Payroll Department at the Boise School District Services Center. Please contact the payroll department at 208-854-4025 with any 401K questions.

Please set up your account with your preferred vendor from the 403(b) Service Provider/Vendor List prior to completing the SRA form since a valid account number will be required during this process. The Service Provider list is available on the Employee Online site under Payroll Information. You are allowed to use any Financial Advisor you wish, but contributions through your Boise School District payroll check is limited to these approved vendors.

It is best to complete the SRA form earlier than the deadline on any new contributions to allow Omni Group time to verify that your account is setup with your chosen vendor and ready to receive funds. Once the account is verified, Omni Group notifies the Boise School District Payroll department to start the contribution.

Go to the Omni403b.com website

Click on Employees

Click on Start/Change Contributions.
Both the 403B and 457 PDF downloadable versions of the SRA form can be printed, completed and mailed or faxed directly to Omni. The address and fax number are on the back of the form, however the Online submission method is the most efficient method. **Do not send the printed form to the Boise School District Services Center.**

The instructions are the same for the 403b and 457 contributions, just click on the 457 tab instead and follow these steps. I will include the instructions for both the New SRA Express Shortened Form for New Participants and the standard Online SRA Submission form. Since the 403b Online SRA Submission process is the most commonly used I will start with it.
Instructions for the 403b Online SRA Submission:

Click on the 403b Tab.

Click on 403B Online SRA Submission to complete the form online.

Click on the Let’s Begin button to start.

Enter the required Employee information in this section.

The confirmation email will be sent to the address you provide here.

If you wish to have your Financial Advisor receive communication from Omni Regarding the SRA check this box and complete the requested information.
Recurring Contributions:

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 under your employer’s 403(b) plan, please be sure to list all contributions you 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.

Click in the Recurring Contributions box to:
- Begin a new contribution,
- Change the amount of a current contribution, or
- Stop a Current Contribution

Be sure to include all current 403b account information as per the warning in red.

Enter the required information for either the Recurring or One-Time options:
- Plan Type
- Service Provider
- Account #
- Effective Date
- Dollar Amount

If you want to stop the contribution, enter all above data with 0.00 in the amount box.

If you are a part-time employee or substitute, you are eligible to contribute to 403b, 403b Roth or 457 accounts. Your contribution amount cannot exceed your gross pay less any required taxes such as Social Security and Medicare which is 7.65% of the gross pay combined, State and Federal taxes and there must be a net paycheck amount of at least $10.00 to process your paycheck. If the requested amount exceeds this criteria, the contribution will be stopped for the month.

☐ Please check here if you are NOT a full-time employee

Check this box if you are a part-time employee or a Substitute.
You will be asked to complete Step 2 Confirm Entries and Step 3 Submission Confirmation and you will be given Confirmation number. You will receive an email at the address you provided with that Confirmation number but no specific information for security purposes. Your Social Security Number after each step is treated as your signature on the form.

One-Time Contributions:
After completing the Employee information you can also choose the One-Time Contribution option. The One-Time Contributions option is for changes you wish to be effective for one month only and your contribution will return to the prior month’s amount without having to complete an additional SRA to go back to the former amount. It can also be stopped effective the following month depending on the option selected, either Discontinued or Resumed. Discontinued will stop the contribution the month after the one-time amount is taken and Resumed will return to the prior month amount setup.
Instructions for the New SRA Express Shortened Form for new participants:

Select the New 403b SRA Express Shortened Online Form.

Click on Select a Form Option button.

Enter the requested information and click next.

Be sure to check the box regarding not being a full-time employee if that applies.

Enter the Plan type, Investment Provider and amount.

Click Next.
Enter your email address and Social Security number in the boxes.

Click the “Submit to Omni” button on the bottom.
Follow any further verification or confirmation processes that may follow this section.

Contact Lisa Graf at 208-854-4049 or lisa.graf@boiseschools.org if you need further assistance with this process.