

# Central Unified School District

## We are excited to announce **The OMNI Group** as our 403(b), 457(b) Third Party Plan Administrator!

In partnership with Central Unified School District, OMNI will ensure that the district, the employee participants, and each of our investment providers and their agents adhere to the many compliance regulations mandated by the Internal Revenue Service.

OMNI's services include the review and approval of any and all 403(b) transactions, as well as the implementation of Salary Reduction Agreement (SRA) forms. Refer to the instructions on the following pages to submit an SRA or any of the following transactions.

- Distribution (including distributions due to age, death, disability, separation from service, and domestic relations orders).
- Exchanges/Transfer/Rollover of 403(b) funds between vendors or 403(b) plans
- Hardship distribution
- Loans
- Purchase of Service Credits

In the event that you wish to make a change to your 403(b) benefit, you will need to submit a **Salary Reduction Agreement (SRA)** form. Changes include: starting a new deduction, stopping an existing deduction, changing the amount of an existing deduction, or changing your investment service provider.

The SRA form can be found in the "Forms" section of OMNI's website at [www.omni403b.com](http://www.omni403b.com). You have the option of printing out a form and faxing it to OMNI or completing the form electronically on their secure website. It is suggested that you complete the electronic SRA form to expedite your request.

OMNI is available from 7:30am to 8:00pm Monday - Friday EST to assist with any questions you may have. OMNI's call center representatives can be reached at:

**(877) 734-6653 or (877) 544-6664**



Follow us for daily 403(b) & 457(b) information.



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Specific plan information is available on OMNI's website at [www.omni403b.com](http://www.omni403b.com). This information can be viewed by following the steps below:

Go to OMNI's website at [www.omni403b.com](http://www.omni403b.com) and select the purple button labeled **"Participants"**:



Next, in the lower left-hand corner in the blue box select the **Employer's State**:



On the same page, in the lower left-hand corner begin entering the **Employer Name**. Note that when you begin typing the name, a dropdown box will appear where you can select your organization's name.





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You have now reached the Central Unified School District webpage where you will find the following information:

1. **Plan Features** – Outlines what is or is not permitted within the plan based on the organization's current plan document.
2. **Participating Service Providers** – Add or open an account choosing from the investment service providers that have been approved in our plan.
3. **Salary Reduction Agreement (SRA)** – Employees can submit an on-line SRA form to start, stop or make a change to their contribution. You must already have an account established with your selected service provider before submitting an SRA.
4. **Plan Transactions** – You'll find the forms needed to initiate transactions such as a distribution, hardship or loan.

Please note: If you are currently contributing to multiple investment providers, please be sure to list all contributions you wish to continue on the new SRA. Any current 403(b) or ROTH 403(b) contributions not listed on the new SRA will be discontinued.



## OMNIOnline Secure Participant Portal

OMNIOnline Secure Participant Portal can be accessed by clicking on the **Enroll Now** link as seen below.

The Participant Portal can be used for:

- Viewing current contributions
- Viewing prior contributions
- Transactions
  - Viewing status of transactions in process
  - Viewing transaction history
- Completing online SRA and transaction forms\*

\*Not necessary to establish an account to submit SRA or transaction forms

For more details on OMNIOnline Secure Participant Portal go to

[http://www.omni403b.com/Files/OMNIOnline\\_ParticipantUser.pdf](http://www.omni403b.com/Files/OMNIOnline_ParticipantUser.pdf)



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