



## **Salary Reduction Agreement Processing Service**

### **Employee Online SRA Tutorial**

**TSA Consulting Group, Inc.**

**Compliance & Administration Service Provider**

**Client Services**

**73 Eglin Parkway NE • Fort Walton Beach, FL 32548**

**888.796.3786 Option 5 • [sraprocessing@tsacg.com](mailto:sraprocessing@tsacg.com)**

Dear Employee,

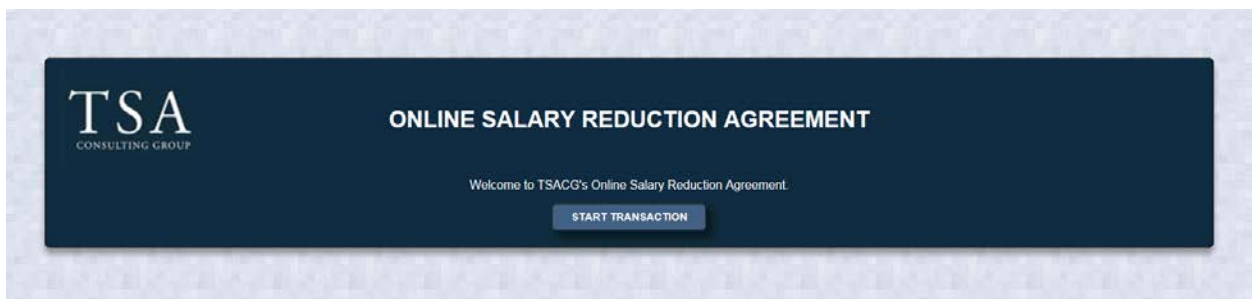
Candia School District is pleased to announce that enhancements have been made to the 403(b) Salary Reduction and 457(b) Participation Agreement (SRA) process as of September 1, 2020. On this date, new election requests will be submitted through an online system. This system is provided by our 403(b) and 457(b) Plan Administrator, TSA Consulting Group, Inc. (TSACG). The online process reduces the need for paper SRAs and allows 24-hour access for employees.

There are many benefits to the new SRA process:

- Employees simply visit <https://sra.tsacg.com> to access the online system.
- The system can be accessed 24 hours a day, 7 days a week.
- Employees can start, change, or stop a 403(b) and/or 457(b) SRA at their convenience.
- Employees receive immediate online confirmation that their request has been submitted.
- Authorized Investment Provider Agents/Representatives can assist employees.
- A list of Authorized Investment Providers is available at [www.tsacg.com](http://www.tsacg.com)

Employees should review the information below to successfully utilize the online 403(b) Salary Reduction and 457(b) Participation Agreement process:

1. Before completing the online process, you **MUST** have an account established with the Authorized Investment Provider of your choice.
2. Navigate to the secure website <https://sra.tsacg.com>.



3. **Note that the SRA information entered via the online system will supersede and replace all prior 403(b) and/or 457(b) agreements including the amounts, investment providers, and effective dates. Any election(s) you want to continue must be reflected or the election will be stopped.**
4. Employer and Participant Information – If you have previously entered SRA information or TSACG has your demographic information archived in their system, most of your personal information will pre-populate. If your information is not currently in TSACG's system, you will be able to add your record. Depending on the information displayed, be prepared to enter the following information:
  - Employer's State
  - Employer's Name
  - Employee's Social Security Number
  - Employee's Date of Birth
  - Employee's Name, Address, and Telephone Number

**Part 2: Employer Information**

\* Employer State  \* Employer

If you cannot find the employer's state or employer's name above, please contact the SRA Processing department at 888-796-3786 option 5 to determine if we are the TPA for the employer.

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**Part 3: Participant's Information**

Social Security Number  **AND** Date of Birth

**Personal Information**

\* First Name

Middle Name

\* Last Name

Hire Date

Employer Termination Date

\* Has the participant terminated employment with this employer?  No  Yes

**Contact Information**

\* Address

\* City

\* State

\* Zip Code

\* Phone Number  Ext

Email

\* Alternate Email

5. Salary Reduction Agreement Information – You have the ability to start, change, or stop contributions. If you want to maintain an existing contribution(s), you will need to enter the information for that contribution in addition to any other changes you are making. Be prepared to enter the following information:

- Effective Date of the contribution(s)
- The total dollar amount per pay period for all contributions
- The investment provider(s) to whom you would like to contribute
- The Plan type
- The amount of a previous contribution, if any
- The new amount of your contribution

**Part 4: Salary Reduction Agreement Information**

Salary Reduction Agreement Information

Effective Date

@ Dollars

Total Per Pay Dollar Amount \$

Total Per Pay Amount above must match SRA Total below.

403(b) Contributions					
Investment Provider	Contract/ Account Number	Plan Type	Previous Amount	New Amount	
Select Investment Provider	<input type="text"/>	403(b)	\$ 0.00	\$ 200.00	<input type="button" value="Remove"/>
<input type="button" value="Add"/>					

\* SRA Total \$

\* Must Equal Total Per Pay Amount

6. Salary Reduction Agreement Terms and Disclosures – Once you have clicked *Finished*, you will be asked to read and confirm that you have read the SRA terms. You will also be asked to acknowledge the SRA disclosures.

7. Submitting your SRA – After completing the terms and disclosures sections, you will be asked to confirm that you are not a robot, and then you can submit your SRA. TSACG will forward your

contribution information to us, and you can print a copy of the SRA for your records. Providing your account(s) is established with your investment provider, no further action is required.

The screenshot shows a web interface for the TSA Online Salary Reduction Agreement. At the top left is the TSA Consulting Group logo. The main heading is "ONLINE SALARY REDUCTION AGREEMENT". Below this is a welcome message: "Welcome to TSACG's Online Salary Reduction Agreement." A "START TRANSACTION" button is centered below the message. The main content area contains a confirmation message: "Your Salary Reduction Agreement (SRA) request has been received. Your SRA will be processed as soon as administratively possible based on your Employer's payroll processing schedule." Below this is a link: "Click here to download your SRA forms." and a "FINISH" button.

Should you have any questions regarding the process, please contact TSACG's SRA Department at 888.796.3786, option 5.