



Adding a New Employee to Empower

This form should be completed by new employees who will receive benefits from your organization. Below lists the required fields for adding a new participant through the Empower Plan Service Center.

If you have questions, please contact the Church Benefits Board at helpdesk@churchbenefits.org or (770) 220-1672

- First name _____
- Middle Initial _____
- Last name _____
- Social Security Number _____
- Birth Date _____
- Marital Status _____
- Gender _____
- Preferred Language _____
- Address _____
- City _____
- State _____
- Zip _____
- Home Phone _____
- Work Email _____
- Personal Email _____
- Participation Date (date eligible for benefits) _____
- Hire date _____
- Annual Salary Amount _____

This form is for your records and does not need to be returned to CBB.

Step by Step Instructions are below.

Step-by-Step instructions to Add/Enroll Employee into CBB 403(b)9 Plan

Screen 1

1. Login to Empower Plan Service Center (plan.empower-retirement.com)
2. Click "Participants" in left menu
3. Click "Add Employee"
4. Complete All Fields using information from "Adding New Employee" Form
5. Click Continue

Add a New Employee:

Enter SSN:	<input type="text" value="000-00-1234"/>
Re-Enter SSN:	<input type="text" value="000-00-1234"/>
Participant Date of Birth:	<input type="text" value="01/01/2000"/> mm/dd/yyyy
Participant Last Name:	<input type="text" value="SMITH"/>

Screen 2

1. Complete all applicable information.
2. Be sure to include personal email AND work email. At the very least, you must include a personal email address.
3. Click Continue

SSN: 000-00-5555 Name: SMITH

Employee Basic Information:

*Last Name:	<input type="text" value="SMITH"/>
*First Name:	<input type="text" value="JANE"/>
Middle Name:	<input type="text"/>
Suffix:	<input type="text"/>
*Birth Date:	<input type="text" value="01/01/2000"/> (mm/dd/yyyy)
Marital Status:	<input type="text" value="MARRIED"/>
Gender:	<input type="text" value="FEMALE"/>
Language Preference:	<input type="text" value="ENGLISH"/>
Non Resident Alien:	<input type="text"/>

Employee Contact Information:

*Address:	<input type="text" value="1111 SAMPLE LANE"/>
*City:	<input type="text" value="SAMPLE"/>
**State:	<input type="text" value="VIRGINIA"/>
**Zip:	<input type="text" value="22222"/>
Country:	<input type="text" value="UNITED STATES"/>
Home Phone:	<input type="text" value="540"/> <input type="text" value="555-5555"/>
Work Phone:	<input type="text" value="540"/> <input type="text" value="234-5678"/> <input type="checkbox"/> Work number recommended to provide a more accurate reporting and website experience.
Extension:	<input type="text"/>
Mobile Phone:	<input type="text" value="540"/> <input type="text" value="555-5555"/>
Fax:	<input type="text"/>
Work Email:	<input type="text" value="JSMITH@FBCSAMPLE.I"/> <input type="checkbox"/> Email recommended to provide a more accurate reporting and website experience.
Personal Email:	<input type="text" value="JANESMITH@GMAIL.CC"/>
Confirm:	<input type="text" value="JANESMITH@GMAIL.CC"/>

* Mandatory Fields
** Mandatory Fields for the United States and Canada only

Screen 3

1. Eligibility Code = Yes
2. Participation Date = Date Employee was eligible to receive benefits
3. Leave Participant Date Source & Ineligibility Reason Code Blank
4. Click Continue

Eligibility Information:

Eligibility Code:	Yes
Participation Date:	05/01/2023 (mm/dd/yyyy)
Participation Date Source:	
Ineligibility Reason Code:	

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Screen 4

1. Salary Amount = Annual Salary + Housing Amount
2. Frequency = Annual
3. Click Continue

Enter Income Data:

*Salary Amount:	80000
*Frequency:	ANNUAL * 1

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Screen 5

1. Hire Date = The Employee's First Day
2. Leave the remaining items blank
3. Click Continue

SSN: 000-00-5555 Name: JANE SMITH

Add new employment information:

Hire Date	05/01/2023 (mm/dd/yyyy)
Term Date	(mm/dd/yyyy)
Term Reason	
Employee Id	
Insider?	No
Officer?	No
Super Officer?	No
Highly Compensated?	No
Ownership Percentage	
Trade Monitoring Indicator?	
FT/PT Employee	
Overseas Employee?	
Overseas Date	(mm/dd/yyyy)

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Screen 6

1. Confirm the Division/Account listed is your employer

**If you manage multiple employer accounts, be sure you select the one applicable to this employee.*

2. Click Continue

SSN: 000-00-5555 Name: JANE SMITH

Enter Subset Information:

Select Division:

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Screen 7

1. Click "Continue Using Default Allocation"

**Do not change any percentages.*

SSN: 000-00-5555 Name: SALLY SMITH

Employee Allocation Information as of: 05/25/2023
No allocations are defined for this participant.

[Add/Change Allocations](#)

Note: Funds may impose redemption fees on certain transfers, redemptions or exchanges if assets are held less than the period stated in the fund's prospectus or other disclosure documents. For more information, please refer to the fund's prospectus and/or disclosure documents.

Enter New allocations for future contributions:

Investment Option	Fund Short Name	Enter Percentage
Guaranteed Lifetime Income		
Empower SecureFoundation Bal Instl	V8IBLZ 1	<input type="text" value="0"/> %
Asset Allocation		
Vanguard Target Retirement Income Inv	VTINX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2020 Inv	VTWNX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2025 Inv	VTTVX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2030 Inv	VTHRX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2035 Inv	VTTX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2040 Inv	VFORX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2045 Inv	VTIVX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2050 Inv	VFIFX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2055 Inv	VFFVX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2060 Inv	VTTSX 1	<input type="text" value="0"/> %
Vanguard Target Retirement 2065 Inv	VLXVX 1	<input type="text" value="0"/> %
International		
Fidelity Total Intl Index Instl Premium	FTIHX 1	<input type="text" value="0"/> %
MFS Intl Diversification R6	MDIZX 1	<input type="text" value="0"/> %
Small Cap		
Fidelity Small Cap Index	FSSNX 1	<input type="text" value="0"/> %
Large Cap		
Harbor Large Cap Value Retirement	HNLVX 1	<input type="text" value="0"/> %
JPMorgan Large Cap Growth R6	JLGMX 1	<input type="text" value="0"/> %
Vanguard Total Stock Market Idx Instl	VTSX 1	<input type="text" value="0"/> %
Balanced		
Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX 1	<input type="text" value="0"/> %
Vanguard LifeStrategy Growth Inv	VASGX 1	<input type="text" value="0"/> %
Vanguard LifeStrategy Income Inv	VASIX 1	<input type="text" value="0"/> %
Vanguard LifeStrategy Moderate Growth	VSMGX 1	<input type="text" value="0"/> %
Bond		
BlackRock Total Return BlackRock K	MPHQX 1	<input type="text" value="0"/> %
DFA Inflation-Protected Securities I	DIPSX 1	<input type="text" value="0"/> %
Fidelity US Bond Index	FXNAX 1	<input type="text" value="0"/> %
Fixed		
Guaranteed Interest Fund	GWGIF 1	<input type="text" value="0"/> %

Total: %

[Use Default Allocation](#) [Save](#) [Cancel](#)

Screen 8

1. Click “Continue without deferrals”

Add employee deferral

Please select either a Percentage or Dollar amount to be deducted from each paycheck.

Deferral information for Before Tax

Percent Dollar Enter deferral election Select target payroll

Deferral information for Roth

Percent Dollar Enter deferral election Select target payroll

Continue without deferrals Continue

That’s it! When complete, the system will bring you back to the first screen.

Important Notes:

1. **Existing Employee Error:** If an employee has an account within the CBB 403(b)9 plan but is associated with another employer, you will not be able to get through this entire process. You will receive an error that says this individual already exists in the system. If that happens, email Jenny Clore, Director of Benefits, jclore@cbf.net.
2. **Employee Deferrals:** Deferrals or Employee Voluntary Contributions should be managed by the administrator/billing contact. Employees are required to complete a [Salary Reduction Agreement](#) and submit to the employer’s financial administrator.