



## 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](mailto: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 (Required) \_\_\_\_\_
- Participation Date (date eligible for benefits) \_\_\_\_\_
- Hire date \_\_\_\_\_
- Annual Salary Amount \_\_\_\_\_  
Salary + Housing + SECA Offset (if applicable)

**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

**Employee Basic Information:**

*Last Name:	<input type="text" value="TEST"/>
*First Name:	<input type="text" value="SAMPLE"/>
Middle Name:	<input type="text"/>
Suffix:	<input type="text"/>
*Birth Date:	<input type="text" value="01/01/1968"/> (mm/dd/yyyy)
Marital Status:	<input type="text" value="MARRIED"/>
Gender:	<input type="text" value="MALE"/>
Language Preference:	<input type="text" value="ENGLISH"/>
Non Resident Alien:	<input type="text"/>

**Employee Contact Information:**

*Address:	<input type="text" value="1111 SAMPLE WAY"/>
*City:	<input type="text" value="MIDLOTHIAN"/>
**State:	<input type="text" value="VIRGINIA"/>
**Zip:	<input type="text" value="23112"/>
Country:	<input type="text" value="UNITED STATES"/>
Home Phone:	<input type="text"/>
Work Phone:	<input type="text" value="540 867-5329"/>
Extension:	<input type="text"/>
Mobile Phone:	<input type="text" value="540 555-5555"/>
Fax:	<input type="text"/>
Work Email:	<input type="text" value="TEST@FBCSAMPLE.ORG"/>
Personal Email:	<input type="text" value="TEST.SAMPLE@GMAIL.C"/>
Confirm:	<input type="text" value="TEST.SAMPLE@GMAIL.C"/>

\* 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:	<input type="text" value="Yes"/>
Participation Date:	<input type="text" value="05/01/2023"/> (mm/dd/yyyy)
Participation Date Source:	<input type="text"/>
Ineligibility Reason Code:	<input type="text"/>

## Screen 4

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

**Enter Income Data:**

*Salary Amount:	<input type="text" value="80000"/>
*Frequency:	<input type="text" value="ANNUAL * 1"/>

## 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	<input type="text" value="05/01/2023"/> (mm/dd/yyyy)
Term Date	<input type="text"/> (mm/dd/yyyy)
Term Reason	<input type="text"/>
Employee Id	<input type="text"/>
Insider?	<input type="text" value="No"/>
Officer?	<input type="text" value="No"/>
Super Officer?	<input type="text" value="No"/>
Highly Compensated?	<input type="text" value="No"/>
Ownership Percentage	<input type="text"/>
Trade Monitoring Indicator?	<input type="text"/>
FT/PT Employee	<input type="text"/>
Overseas Employee?	<input type="text"/>
Overseas Date	<input type="text"/> (mm/dd/yyyy)

## 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:

## 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: 05/25/2025**  
No allocations are defined for this participant

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
<b>Guaranteed Lifetime Income</b>		
Empower SecurFoundctn Bk Instl	YSBLZ 1	<input type="text" value="L"/> %
<b>Asset Allocation</b>		
Vanguard Target Retirement Income Inv	VTHIX 1	<input type="text" value="F"/> %
Vanguard Target Retirement 2020 Inv	VTHIX 1	<input type="text" value="F"/> %
Vanguard Target Retirement 2025 Inv	VTTIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2030 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2035 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2040 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2045 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2050 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2055 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2060 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2065 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2070 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2075 Inv	VTHIX 1	<input type="text" value="C"/> %
Vanguard Target Retirement 2080 Inv	VTHIX 1	<input type="text" value="C"/> %
<b>International</b>		
Fidelity Intl Indx Intl Portm Inv	FTIIX 1	<input type="text" value="C"/> %
MFE Intl Divers/Global R6	MGLGX 1	<input type="text" value="L"/> %
<b>Small Cap</b>		
Fidelity Small Cap Index	FPSMX 1	<input type="text" value="C"/> %
<b>Large Cap</b>		
Fidelity Large Cap Value Retirement	FNLIX 1	<input type="text" value="C"/> %
JF Manager Large Cap Growth F6	JLGMX 1	<input type="text" value="L"/> %
Vanguard Total Stock Market ex Intl	VTSIX 1	<input type="text" value="L"/> %
<b>Balanced</b>		
Vanguard LifeStrategy Conservative Inv	VNSCV 1	<input type="text" value="C"/> %
Vanguard LifeStrategy Growth Inv	VNSGX 1	<input type="text" value="C"/> %
Vanguard LifeStrategy Income Inv	VNSIX 1	<input type="text" value="C"/> %
Vanguard LifeStrategy Moderate Growth	VNSMX 1	<input type="text" value="C"/> %
<b>Bond</b>		
BlackRock Total Return Global Bond K	MPHGX 1	<input type="text" value="C"/> %
DFA Inflation Protected Securities I	DIPGX 1	<input type="text" value="L"/> %
Fidelity US Bond Index	FBNIX 1	<input type="text" value="C"/> %
<b>Fixed</b>		
Guaranteed Interest Fund	GIWIF 1	<input type="text" value="C"/> %

Total  %

## 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](mailto: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.