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Facilitating OregonSaves – Adding Support (Optional step)

Based on your business operation, you may ask someone – an internal colleague (delegate) or external payroll vendor – to manage some of your activities.

What is the difference? A **delegate** is someone internal to your company, such as an HR manager or bookkeeper, who is acting on behalf of your company in adminstering your participation in the program. A **payroll represenative** is external to your company and assists you with managing your employee payroll activities.

Registration	Account setup				Account management
Web register	Submit employee information	Set up bank information	**Add support (internal or payroll provider)**	Submit contributions	Continue submitting contributions and updating employee roster
When you receive your notification and before your deadline	Within 30 days of completing your registration	After you add employee information		Submit with the first payroll 30 days after you add employee information	Each pay period

Adding internal assistance (Delegate)

1. Complete all fields with the required information.
2. Choose an Employee (Payroll) List that the Delegate should have access to. To complete the assignment, you may need to create an Employee (Payroll) List first.
3. Select a level of authorization for the Delegate. (See Delegate Roles below.)
4. **Contact your delegate to inform them that you have added them to the employer portal**. They will also receive an email notification from OregonSaves with login instructions.

Delegate roles

As the Administrator of your account, you have the highest level of system access and can perform all actions. However, you can also assign roles and permissions for managing your activities to an internal delegate.

	Payroll processor	Supervisor	Administrator
Add and edit employees	X	X	X
Edit payroll lists	X	X	X
Submit contributions	X	X	X
Add delegates*		X	X
Change delegate access			X
Edit company and bank information			X

*Can only add a new delegate at the same or lower permission level. Delegates added by a payroll consultant must be approved by an Administrator.

Need Assistance?

(844) 661-1256 clientservices@oregonsaves.com Monday – Friday 8 a.m. – 8 p.m. PT

Working with a Payroll Provider

1. First, contact your representative and discuss your OregonSaves responsibilities.
   - Share program information with them.
   - Discuss what support you require.
   - Ask for the name/email of the individual who will support you. (In many cases, your payroll representative is NOT the person you will submit to OregonSaves.)
   - Discuss what type of access they will need to the Employer Portal to update contribution information.
   - Assistance with setting up the deduction.

We're here to help: If you would like assistance facilitating a conversation between you and your payroll provider, OregonSaves Client Services is available to join the call and answer any questions you or your provider may have. Use the information at the bottom of page to contact Client Services.

If…	Then…
The payroll provider needs access to your employer portal to view your employees' contribution rates and upload the employee (payroll) file through the employer portal…	Add the payroll representative to your portal with **full web access**.
You will be providing your payroll provider with updated employee contribution rates prior to each pay date so the payroll provider can upload the employee (payroll) file through the employer portal…	Add the payroll representative to your portal with **limited web access**.
You will be providing your payroll provider with updated employee contribution rates prior to each pay date so the payroll provider can upload the employee (payroll) file using FTP…	Add the payroll representative to your portal with **FTP access**. Add a bank account to your employer portal and link it to your payroll list (this is required for FTP submission).

2. In the Employer Portal, enter the payroll company name and representative's information (name, email, and phone number). Make sure you enter your payroll representative's email address correctly.

3. Using the table above, choose whether your payroll representative will have access to the employer portal or will they only submit payroll via File Transfer Protocol (FTP).

Note: The form may auto-populate with the payroll company's office location information that we have on file, which may differ from the location information you use. If this information is present, you can move forward with entering your payroll representative's contact information.

How to ensure your provider is supporting you.

Depending on the level of access you've authorized for your payroll provider, you'll need to ensure the following:

Full web access: verify with your payroll provider that they have captured the most updated contribution rates for your employees and that they will be handling the file submission.	You can always check into your employer portal following a pay date to see whether your payroll provider has uploaded the contribution file. (Program Dashboard→Scroll down to "Payroll Transactions")
Limited web access/FTP: provide your payroll provider with an updated list of your employees and their contribution rates:	Login to your employer portal and go to "My employees" and download your full list of employees to an Excel spreadsheet to email to your Payroll Provider.

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Remember: Check in on your employer portal regularly if you have a payroll provider that is assisting with facilitation. You can verify the files that have been uploaded, contribution amounts, pay dates, and transaction details within your payroll transactions history located in the employer portal.

Frequently asked questions	
What information should I communicate to my payroll representative about the deduction?	Items you should communicate to your payroll provider include: ▪ savers are auto-enrolling in an IRA. ▪ contributions are calculated from the gross income with the amount deducted after taxes. ▪ contributions are not reported on taxes. ▪ not reportable on W2's. ▪ no employer matching. Program details are available at www.oregonsaves.com. Payroll provider support is available via email at payrollprovidersupport@ascensus.com or by phone at (855) 321-9555. Hours: Monday through Friday, 9 a.m. - 8 p.m. ET.
What levels of access does a payroll representative need?	If you choose to have a payroll representative support you, you will be asked what type of access they should have to the employer portal. The level of access they will need will depend on the activities they will help you with. When you contact your payroll provider, you should ask them whether they use File Transfer Protocol (FTP) to send payroll files. If they will use FTP, they will **not need access to the portal**. A representative should only use FTP if they are familiar with FTP or have used it previously. If they require access to the portal, you will be able to set their access level based on the service they will provide. **Full access to the employer portal:** The payroll representative will have the same, full access that you have, including adding and updating employees and adding and removing bank information. **Limited access to the employer portal:** Your payroll representative will be given limited web access, and will have only a payroll service level to submit files by web.
I haven't set up an employee (payroll) list yet. How do I give my delegate access to a specific payroll?	First, create your payroll list(s) and then come back to add your delegate access to that list.

What happens next?
Each delegate or payroll representative you add will receive a notification of their pending registration. If they have been granted access to the portal, they will need to log on to complete their registration.

A payroll representative who will send files via File Transfer Protocol (FTP) will receive instructions on how to do so.

Notes/Questions

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