

Employer Registration Checklist



Adding a Delegate(s)

Select **My delegates** from the left navigation bar on your dashboard, then select **Add a delegate**. Complete all fields with the required information (name, work email, phone number, and physical/mailling address) and click **Next**. Then, select the payrolls to which the delegate should have access (entire company or specific payrolls), leave a note if needed, and click **Next**. Finally, select a level of authorization for the Delegate and click **Next**. On the Review page you'll be given the opportunity to confirm your information. Select **Previous** to make edits or **Submit** to receive your confirmation number.



Add a Payroll Representative(s)

Select **My payroll representative** from the left navigation bar on your dashboard, then select **Add a payroll representative**. When you confirm your payroll will not be submitted by an internal person, you'll be given the opportunity to enter the company's name and representative's information (email, name, phone number). Click **Next** to continue. Then, answer several questions regarding how the representative will be interacting with your account and click **Next**. On the Review page you'll be given the opportunity to confirm your information. Select **Previous** to make edits or **Submit** to receive your confirmation number.



Creating a Payroll List

Select **My Payrolls** from the left navigation bar on your dashboard and select **Add new payroll**. First, enter your company locations in Oregon. After you enter each location, click **Save**. Once all locations are entered, or you've entered what you need, click **Next** to continue. On the next page, select a location and complete the required information (compensation type, pay cycle, start date, payroll name). Click **Add** once you've entered everything for this payroll. You can then select another location to create another payroll list or click **Next** to continue. On the Review page you'll be given the opportunity to confirm your information. Select **Previous** to make edits or **Submit** to receive your confirmation number.



Adding an Employee(s)

Select **My employees** from the left navigation bar on your dashboard. Then, click **Add new employee(s)**. You can choose to add employees manually or upload an Excel file with the required information.

- **Manual Entry** Select the radio button next to **I will type information on the next page**, then select **Next**. Enter the information outlined for the employee you are adding and continue through the pages until you **Submit** and receive your confirmation number.
- **Upload a File** Select the radio button next to **I will upload information on the next page**, then select **Next**. **Download** the Excel spreadsheet and enter your information following the **Formatting Tips** provided in Step 2 and save your document. Then you can click **Choose a file**, select your file from its saved location, and click **Upload**. Select **Submit** to complete the upload and receive your confirmation number.





Adding Bank Information

Select **Bank information** from the left navigation bar on your dashboard. An Administrator or Contact Person may add a bank by selecting **Add**. Complete all fields (routing number, bank name, bank account number and account type) and check the box to confirm that your ACH transactions will not involve a bank or other financial services company, including any branch or office thereof, located outside the territorial jurisdiction of the United States. Select **Next**, review the information to confirm that it is accurate, then select **Submit** to complete and receive a confirmation number.



Managing contributions

Select **Manage contributions** from the left navigation bar on your dashboard. This page will allow you to review **pending contribution rate updates** made by employees, send **new contributions**, and view **past contributions**. When you're ready to send contributions select the **Payroll list** and enter the **Pay date**. If applicable, check the box below **Pay date** to indicate that a more recent payroll contribution to OregonSaves has already been submitted for this payroll list. Then select **Begin entering contributions**. You can then choose to provide details on employees manually or upload an Excel file with the required information.

- **Manual Entry** Select the radio button next to **I will type my amounts on the next page**, then select one of the radio buttons indicating how you will send the funds to OregonSaves (debit the account on file, enter bank information for one-time use, send money via ACH, wire the funds, mail a check). Select **Next** and enter the **Total contribution** amount and the amount for each employee. If you are not making a contribution for an employee, the contribution field should be left blank or \$0.00 should be entered. Employees highlighted in **green** have been recently added or reactivated to the payroll. Employees highlighted in **gold** indicate that the employer has not acknowledged that they are aware of the Employee's contribution rate. Select **Next** to go to the review page and select **Submit** to receive your confirmation number and funding reference number.
- **Upload a File** Select the radio button next to **I will upload an Excel spreadsheet**, then select one of the radio buttons indicating how you will send the funds to OregonSaves. Select **Next**. **Download** the Excel spreadsheet and enter your information following the **Formatting Tips** provided in the Step 2 and save your document. Then, enter the total amount of the employee contributions in the box in Step 3. Click **Choose a file**, select your file from its saved location, and click **Upload**. The review page will allow you to verify the information uploaded is accurate. You may select **Previous** to make edits or **Submit** to receive your confirmation number and funding reference number.

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(844)661-1256



Mon - Fri 8 a.m. – 8 p.m. PT