



## CalPERS 457 Plan Online Enrollment **Employer FAQ**

### 1. Who is eligible to enroll in the CalPERS 457 Plan online?

All active non-participating employees who want to save for retirement to the CalPERS 457 Plan on a **pre-tax basis only** can enroll online by visiting [calpers457.com](https://calpers457.com).

### 2. How do active non-participating employees enroll in the CalPERS 457 Plan by saving on a Roth after-tax basis or with a combination of pre-tax and Roth after-tax money?

There is no change to the enrollment process for active non-participating employees who want to save for retirement to the CalPERS 457 Plan on a Roth after-tax basis. They must still complete the *Participant Enrollment Kit* and return the forms to you for signing and processing. The *Participant Enrollment Kit* is available to you at [calpers-sip.com](https://calpers-sip.com) and to your employees at [calpers457.com](https://calpers457.com).

### 3. Where can my employees go to learn more about the CalPERS 457 Plan before enrolling?

Employees can visit [calpers457.com](https://calpers457.com) for information on Plan features, expenses, investment options, forms, tools and participating.

### 4. What can I provide my employees who are interested in enrolling online?

The new *How to Enroll Online* flyer provides a step-by-stop guide with screen shots to help employees through the enrollment process. The team of dedicated Account Managers for the CalPERS 457 Plan can also meet with your employees to help guide them through the enrollment process.

### 5. What information will my employees need to provide to enroll online?

To make the online enrollment process easier, we recommend that employees are prepared to provide the following information before enrolling. An employee will need to provide their:

- Employer name (a search bar will help them find the name)
- Personal information (name, Social Security number, date of birth, mailing address, email address)
- Payroll information (salary and payroll frequency)
- Retirement planning information (estimated retirement age, retirement income, and current savings)
- Savings amount per paycheck and investment election

An employee can also provide beneficiary information (relationship, name, date of birth, and Social Security number) or opt to elect a beneficiary at a later date. If an employee is married or in a domestic partnership and designating someone other than their spouse/domestic partner as the primary beneficiary, beneficiary election through online enrollment is not available and they must complete a *Beneficiary Designation Form* for spousal consent.

### 6. How can my employees schedule a one-on-one personal appointment with our Account Manager?

Your employees can visit [calpers457.timetap.com](https://calpers457.timetap.com) or call **888-713-8244** to schedule an appointment. Appointments are available in person, online, and by phone to make it convenient for your employees to meet when and how it's best for them.

### 7. After my employees enroll in the CalPERS 457 Plan, how can they access their CalPERS account online?

Once contributions to the CalPERS 457 Plan begin and your employees have a balance in their account, they can visit [calpers.voya.com](https://calpers.voya.com) and click *Register Now* in the Log In box to set up an account username and password. For questions or support with registering and logging in, participants can call the Plan Information Line at **800-260-0659**.

### 8. When will my employees be able to enroll in the CalPERS 457 Plan online to save for retirement on a Roth after-tax basis?

In 2025, we plan to expand online enrollment to include the Roth saving source. The *Participant Enrollment Kit* will remain an option for employees who would prefer to enroll by form instead of online. Because of the convenience that online enrollment provides them and you, though, we encourage you to implement online enrollment as soon as administratively feasible and engage your dedicated Account Manager to provide support through the enrollment process.