

Adding Roth Contributions to a CalPERS 457 Plan Payroll Report

Congratulations on adding the Roth provision to your CalPERS 457 Plan!

Now that CalPERS has approved your Roth adoption request, your employees may elect to make after-tax Roth contributions. After the contributions are deducted from the employees' payroll, Roth contributions are processed in MyCalPERS in the same manner as pre-tax CalPERS 457 Plan contributions. We've integrated Roth contributions to be seamless within your existing MyCalPERS reporting process. For your convenience, we've outlined submission of Roth contributions below.

Important: Once Voya has activated the Roth Provision, contributions can be recorded on the next full earned period after activation.

Add a 457 Plan Participant Roth Contribution Step-By-Step

The following steps detail how to add a Roth contribution record to a 457 Plan payroll report in MyCalPERS. This procedure begins with a 457 Plan payroll report opened and ready for editing.

| Step | Action |
|------|---|
| 1 | <p>If... you are adding a new participant with a Roth contribution, then... enter the participant's CalPERS ID in the Search and Add New Record to the Report panel then select Add New.</p> <p>If... you are adding a Roth contribution to an existing participant, then... enter the participant's CalPERS ID in the Search and Add New Record to the Report panel then select Search. You may also locate the participant in the Records Present in the Report panel and select their SSN link.</p> |
| 2 | Select the Display button in the lower right corner of the Maintain Payroll Record Details panel. |

3 Enter the participant's Roth contribution amount in the **After Tax Member Paid Roth Contributions** field then select **Save & Exit**.

Maintain Payroll Record Details

Begin Date: 03/01/2019 End Date: 03/15/2019

Payroll Record Memo:

Reported Name and CalPERS ID

CalPERS ID: 5555555555

First Name: Jane Last Name: Doe Middle Name: M

CalPERS 457 Plan

Plan: 452999

Tax Deferred Member Paid Contributions: \$0.0

Tax Deferred Employer Paid Member Contributions: \$0.0

SIP After Tax Loan Payment: \$0.0

After Tax Member Paid Roth Contributions: \$0.0

Buttons: Save & Continue Clear Save & Exit

If we may be of assistance with 457 Plan payroll, please contact us at **800-696-3907**.