

How to Set Up Your OregonSaves Employer Account

The OregonSaves employer portal has been designed with ease of use in mind. Just follow a series of on-screen prompts to quickly and efficiently set up your account.

To prepare to set up your account, you'll need:

- Your company's EIN and unique Access Code (which will be sent to you via mail or email).
- Your payroll provider's name (if you use one) and your company's payroll schedule(s).
- Your company's bank information for payments.
- Your latest employee roster and accompanying personal information (employee name, contact info, date of birth, SSN, etc.). If your payroll provider would like to know what's required, or if you'd like to compile your employee information manually in advance, please [download this .CSV template](#) to be sure you have everything you need.

Follow this timeline to complete your account setup.

When	What you need to do
No later than 30 days after you receive your official registration notice	→ Set up your business online
The day you set up your business	→ Complete the Employer Onboarding flow, including: <ol style="list-style-type: none"> 1. Adding your payroll information 2. Connecting your company bank account 3. Adding your latest employee roster and accompanying personal information (employee name, contact info, date of birth, SSN, etc.) 4. Finishing any other required steps
30 days after you complete the onboarding steps	→ <ol style="list-style-type: none"> 1. Update employees' deferral savings rates in your payroll system 2. Submit your employee contribution amounts with your next payroll
Ongoing for each pay period	→ Continue submitting contributions, maintaining employee deferral changes, and keep your employee roster up to date

Follow our step-by-step registration process to get everything set up.

Once you receive your unique Access Code, you're ready to start. You'll just need to provide basic information about your employees, payroll process, and banking information. And rest assured, OregonSaves has processes in place to protect the security of employer and employee accounts and information.

- 1 Step 1: Set up your business**
Get started by setting up your business online using your company's EIN and unique Access Code (which will be sent to you via mail or email). Visit <http://oregonsaves.vestwell.com/register/employer>.
- 2 Step 2: Create a password**
Enter your username (which is your email address) and create a password.
- 3 Step 3: Add your payroll information**
Identify your payroll provider, if you use one (i.e. Paychex, ADP, and more), and share your payroll schedule(s) or upload your payroll schedule(s) manually.
- 4 Step 4: Add your company's bank information**
Connect your company's bank to OregonSaves. Complete all fields including routing number, bank name, bank account number, and account type.
- 5 Step 5: Add your employee information**
Employees must be at least 18 years old to be eligible for OregonSaves. If your payroll provider would like to know what's required, or if you'd like to compile your employee information manually in advance, please [download this .CSV template](#) to be sure you have everything you need.
- 6 Step 6: Add your employee contributions**
For employees who have opted to stay enrolled, update their payroll deferral rates in your payroll system. After you run your next payroll, submit employee contribution amounts in the OregonSaves portal.
- 7 Step 7: Ongoing account maintenance**
Make sure to keep your employee roster up to date by adding new hires or those who opt-in at a later date, as well as employees who reach the age of eligibility. Please update employee contribution levels as they change.

Frequently Asked Questions

We work hard to ensure that OregonSaves is convenient and meets the needs of all employers and savers. Here are the answers to some frequently asked questions. If you still have questions beyond these, just reach out. We're here to help.

How will I know when I must register and enroll my employees?

You'll get a series of reminders and enrollment communications from OregonSaves when it's time for you to participate. This will also be your chance to certify your exemption from the program if you already offer a qualified, employer-sponsored retirement plan.

Can my company join the program before its required date?

You can join at any time. The required date though, is considered to be your deadline to comply.

When do I need to enroll new employees?

Employers have 60 days from the date of hire to enroll a new employee in OregonSaves.

What is required of employers to facilitate OregonSaves?

As part of the registration process, you will provide a list of your employees and your payroll information. After 30 days, you will need to update your participating employees' contribution rates within your employer portal to ensure accurate payroll deductions. From that point on, you will just need to keep your employees' payroll contribution rates and staff list up to date.

Can I have a designated employee complete the registration and enrollment process?

Yes. You or a designated employee should complete the initial registration. Once that's done, you can elect to add "Admins" to your account to help facilitate the OregonSaves program if you choose not to do it yourself. Admins can be authorized employees or even staff from your payroll provider. The program is designed to work seamlessly with many payroll provider systems.

Why do I have to wait 30 days before starting payroll contributions?

After you've added your employees to the OregonSaves portal, we'll send them a notification. Then they'll have 30 days to decide to stay enrolled, opt out of participating, or customize their account settings. After this 30-day opt-out period, you'll need to start payroll contributions for employees who choose to remain in the program.

Where can I find more information about the OregonSaves Employer Portal?

More helpful answers to common questions can be found at <https://oregonsaves.zendesk.com/hc/en-us>.