

# CPI PARTICIPANT WEBSITE INSTRUCTIONS

## for Coventry Public Schools 403(b) Plan

In order to bring our 403(b) plan services as close as your fingertips, we provide a Participant Website. The website features step by step instructions to guide you through all of the features and options.

### **CPI makes it easy for you to:**

- Obtain vendor contact information
- Make changes to the amount of your deferral elections
- Make changes to your vendor(s)
- Request vouchers for loans and hardship withdrawals
- Request vouchers for contract exchanges

The website is available 24 hours a day, 7 days a week.

### **HOW TO GET STARTED**

To access the system for the first time, log onto the website at <https://www.cpicrs.com>. For prompt access, please have your six-digit plan reference number 106195, the last four digits of your social security number (SSN) and date of birth available. The first time you log onto the website, you will be required to choose a new user name other than the last four digits of your SSN. You will also be prompted to establish a password of your choosing.

Once you have changed your user name and established a password, the Plan Contact feature will provide a list of all approved vendors as well as the financial advisors' contact information.

### **Under the Request a Transaction feature you will have access to:**

- **Change Salary Deferral Contribution** - Make a change to your election for future contribution amounts as well as make changes to your current vendors. The Vendor Elections shown on the Website will be used until you change them through the website or by submitting an Elective Deferral and Vendor Election Form, which can be obtained by contacting the CPI Participant Service Center at (877) 488-4040 or by sending an e-mail to [Participant.ServiceCenter@cpicrs.com](mailto:Participant.ServiceCenter@cpicrs.com). On the website you will also have access to several retirement planning tools to assist you in deciding how much you should be deferring in order to meet your retirement goals.
- **Request a Loan and Hardship Withdrawal** - Request a loan and hardship withdrawal from any of the approved vendors for which you have invested contributions by requesting a voucher. This voucher is needed as it lets your vendors know that you have met the regulatory requirements. The voucher does not guarantee that a loan and hardship withdrawal can be made as each vendor may apply additional restrictions.
- **Request a Contract Exchange** - Request a voucher to exchange your account balance to another approved vendor. If your contract exchange between vendors is approved, you will be provided with a contract exchange voucher, which you will need to provide to the transferor vendor along with the vendor's transfer request forms. It is important that before you exchange assets that you first obtain a voucher. Any contract exchange that is made that does not comply with the final regulations could cause the loss of the tax-qualified status of the money transferred to the vendor. If this happens, the money will become taxable to you.

**You will need Version 6 or greater of Netscape Navigator or Version 5 or greater of Internet Explorer to access the website.** Most people have at least one of these versions on their computer.

If you do not have Internet access, have questions regarding the website, or want to make a request contact the Participant Service Center.

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### **PARTICIPANT SERVICE CENTER**

Participant Service Center (877) 488-4040, from 7 a.m. to 7 p.m. Central Time, Monday through Friday. You can also send an e-mail to [Participant.ServiceCenter@cpicrs.com](mailto:Participant.ServiceCenter@cpicrs.com). For prompt assistance, please have your six-digit plan reference number 106195, the last four digits of your social security number and date of birth available.