



# 401K & Payroll Integrations:

## LIVE FAQ (360)

Below are common questions asked once 401k & Payroll 360 integration is LIVE!

### 1. How are employee contributions submitted?

**Answer:** With each payroll processed, a file is sent to PayKconnect, our third-party vendor responsible for handling all 401(k) integrations. PayKconnect converts the payroll data into the required format, ensuring the 401(k) vendor receives accurate employee demographic and contribution information for seamless submission.

### 2. How do I reconcile files once the integration is LIVE?

**Answer:** Run the [RETIREMENT REPORT](#) found in Thread.

*Reports>My Reports> Retirement Report by payroll Run-* This report provides a detailed breakdown of the information sent to your 401(k) vendor. If the figures don't match, please contact your Benefits Specialist for assistance.

Search the menu

- Customer Service
- Employee Admin Tools
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- Reports**
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- Quarterly Reports
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- Year End Reports On Demand
- Report Archive
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### My Reports

Report Category: Benefit Reports Search:  Filter

Output Name	Report Type
BENEFIT STATEMENTS	AS OF DATE
Broker Census with Dependents	By Payroll Run
Broker Census with Dependents	As Of Date
Client Level Benefits Setup	As Of Date
COBRA Insured List	Date Range
Dependent Age Out Report	By Payroll Run
Dependent Age Out Report	As Of Date
Dependent Benefit Export	By Payroll Run
Election Summary by Employee	As Of Date
Election Summary by Plan	As Of Date
Employee Benefit Coverage by Employee	As Of Date
Employee Benefit Coverage Detail	As Of Date
Employee Benefit Premium	As Of Date
Employee Births Age List	As Of Date
Employee Life Events	Date Range
Employer Match Report	Date Range
Employer Match Report Summary	Date Range
Enrollment Status	By Payroll Run
Enrollment Status	As Of Date
Enrollment Status - Life Events	As Of Date
Ins Plans Pending Underwriting Approval	Date Range
Open Enrollment Changes	Date Range
Open Enrollment Dates Export	As Of Date
Retirement Export	By Payroll Run
<b>Retirement Report</b>	<b>By Payroll Run</b>
Retirement Report	Date Range

**Generate Report** **Go To My Reports Queue**

Once your report request has been submitted you can do any of the following: Run another report, go to My Reports Queue to perform other tasks. The report will be available in My Reports Queue for 72 hours.

### Retirement Report

This report displays deferred comp plans assigned to employees with Current, MTD, QTD, and YTD accumulations for EE contributions and loans and ER matches.

**Filtering**

Company: CRES - Egn-CareHealthcare of Atlanta PC

Pay Group: All Employees

Payroll: Regular Payroll - Pay Date: 1/15/2024 (Run-MCS)

**Sorting**

Sort Field 1:

Sort Field 2:

Sort Field 3:

Scheduled Sort: None

**Options**

☐ Add Report to Archive

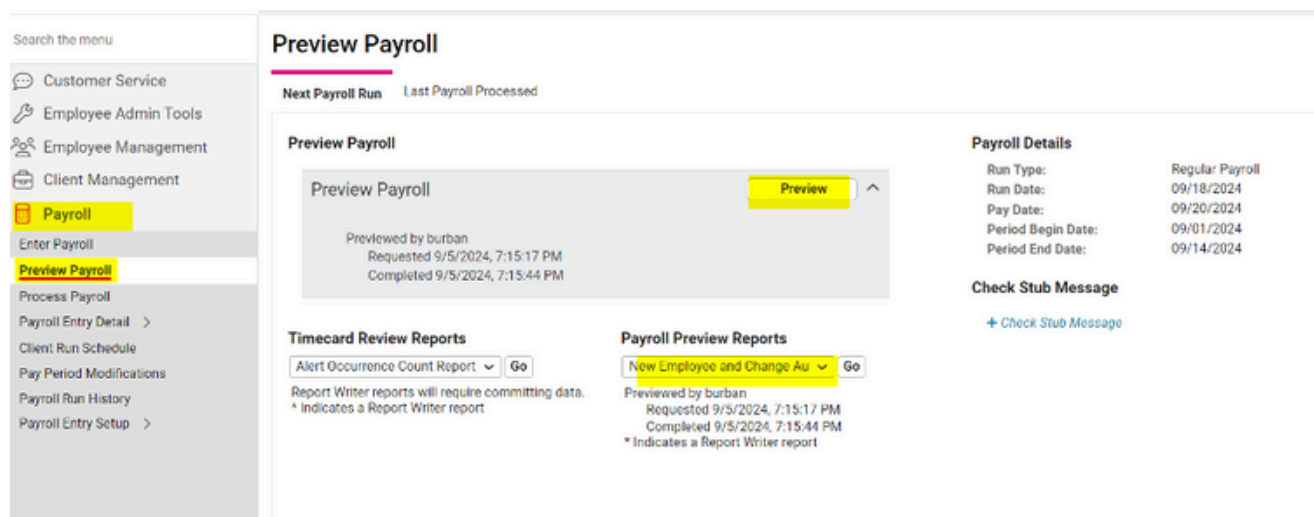
### 3. What happens if a file returns an error?

**Answer:** If a file transfer returns an error from Thread to PayKconnect, the Benefits Specialist will receive an email notification from PayKconnect about the issue. However, if an error occurs on the 401(k) vendor portal and PayKconnect does not reflect this error, it is the responsibility of the Plan Administrator to collaborate directly with the 401(k) vendor to resolve the issue.

### 4. How do employee changes get submitted, loans added, etc?

**Answer:** Answer: With a 360 feed, employees can update their contribution details either in Thread or with the 401(k) vendor, and these changes will automatically sync through the integration. The 401(k) vendor will generate change reports whenever employees make updates. You will receive a copy of these reports via email, and we recommend reviewing them for any changes before processing payroll. If you notice that an update hasn't been reflected, please contact your benefits specialist for assistance.

Additionally, you can track employee contribution changes in Thread by running the New Employee and Change Audit Report while previewing payroll.



The screenshot displays the 'Preview Payroll' interface. On the left is a sidebar menu with options: Customer Service, Employee Admin Tools, Employee Management, Client Management, Payroll (highlighted), Enter Payroll, Preview Payroll (highlighted), Process Payroll, Payroll Entry Detail, Client Run Schedule, Pay Period Modifications, Payroll Run History, and Payroll Entry Setup. The main content area is titled 'Preview Payroll' and includes a 'Next Payroll Run' and 'Last Payroll Processed' status bar. Below this, there's a 'Preview Payroll' section with a 'Preview' button and a summary: 'Previewed by burban', 'Requested 9/5/2024, 7:15:17 PM', and 'Completed 9/5/2024, 7:15:44 PM'. To the right, 'Payroll Details' are listed: Run Type (Regular Payroll), Run Date (09/18/2024), Pay Date (09/20/2024), Period Begin Date (09/01/2024), and Period End Date (09/14/2024). Below the payroll details is a 'Check Stub Message' section with a '+ Check Stub Message' link. At the bottom, there are two report sections: 'Timecard Review Reports' with a dropdown for 'Alert Occurrence Count Report' and a 'Go' button, and 'Payroll Preview Reports' with a dropdown for 'New Employee and Change Au' and a 'Go' button. Both report sections include a preview status and a note: '\* Indicates a Report Writer report'.

**[For more on your responsibility for your 401k integration with Thread, please view this link.](#)**