



401k & Payroll Integration FAQs

See below for most common questions when integrating your 401k and payroll providers:

1. How long does the Implementation take?

Answer: We typically recommend a minimum of two payroll cycles for testing to ensure data accuracy before transitioning to live information. However, some 401k providers may extend this timeframe. Clients will be kept informed and included in all communications throughout the testing process.

2. Who's responsible for contributions during Implementation?

Answer: The client is responsible for ensuring that employee contributions are loaded into their accounts in a timely manner. If you have any questions or need assistance, please don't hesitate to contact your Benefits Specialist.

3. How do I update employee's information during testing if someone has a loan, contribution change, etc.?

Answer: To make changes to an employee's contribution you will want to go to Employee Management> Employee Benefits> Benefits> Deferred Comp tab> edit pencil.

Start Date	Stop Date	Employee Contribution	401k Plan	Amount	Percent	Notes	Actions
10/1/2024		Amount: \$0.00 Percent: 0%	401k				

Loans: Employee Management> Employee Pay> Deductions> 401k Loan> Pencil icon> Please note a reference number is REQUIRED for integrations.

4. How will I know when the testing is completed?

Answer: At the end of testing a "Congratulations, 401k is LIVE" e-mail will be sent out.

401K Loan

* Pay Item: 401K Loan

Reference Number: [Field]

Default Schedule: Every Pay

Schedule Override: [Dropdown]

Start Date: [Field]

Stop Date: [Field]

* Balance: 0.00

Amount: [Field]

Arrears Information

☐ Apply Arrears Balance