



401K & Payroll Integrations:

LIVE FAQ (180)

Below are common questions asked once 401k & Payroll 180 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.

The screenshot displays the Thread system interface. On the left is a navigation sidebar with a search bar and various menu items. The 'Reports' section is highlighted, and a sub-menu 'My Reports' is expanded. The main content area shows a table of reports under the 'Benefit Reports' category. The 'Retirement Report' is highlighted in yellow. To the right of the table is a configuration panel for the 'Retirement Report'. It includes a message about report generation, a 'Filtering' section with dropdowns for Company, Pay Group, and Payroll, a 'Sorting' section with dropdowns for Sort Field 1, Sort Field 2, and Sort Field 3, and an 'Options' section with a checkbox for 'Add Report to Archive'.

| Output Name | Report Type |
|-----------------------------------------|----------------|
| 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 Premiums | As Of Date |
| Employee Birth 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 |
| Retirement Report | By Payroll Run |
| Retirement Report | Date Range |

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: [Dropdown]
Pay Group: [Dropdown]
Payroll: [Dropdown]

Sorting

Sort Field 1: [Dropdown]
Sort Field 2: [Dropdown]
Sort Field 3: [Dropdown]
Scheduled Sort: None

Options

☐ Add Report to Archive

3. What happens if a file returns an error?

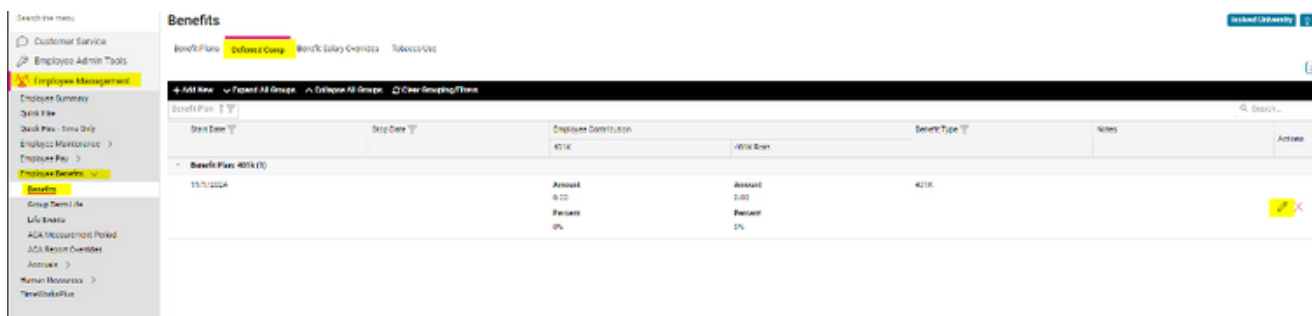
Answer: If a file transfer returns an error from Thread to PayKonnnect, the Benefits Specialist will receive an email notification from PayKonnnect about the issue. However, if an error occurs on the 401(k) vendor portal and PayKonnnect does not reflect this error, it is the responsibility of the Plan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

4. How are employee changes, such as loans, submitted?

Answer: With a 180 integration, the data flows one way—from payroll to the 401(k) vendor. If an employee makes changes directly on the 401(k) vendor's platform, the client will be notified via email. It is the client's responsibility to update Thread promptly to ensure these changes take effect. If you need help or have any questions about making updates, please reach out to your Benefits Specialist.

5. How do I update an employee's information if someone has a loan, contribution change, etc.?

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



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

For more on your responsibility for your 401k integration with Thread, please view this link.

