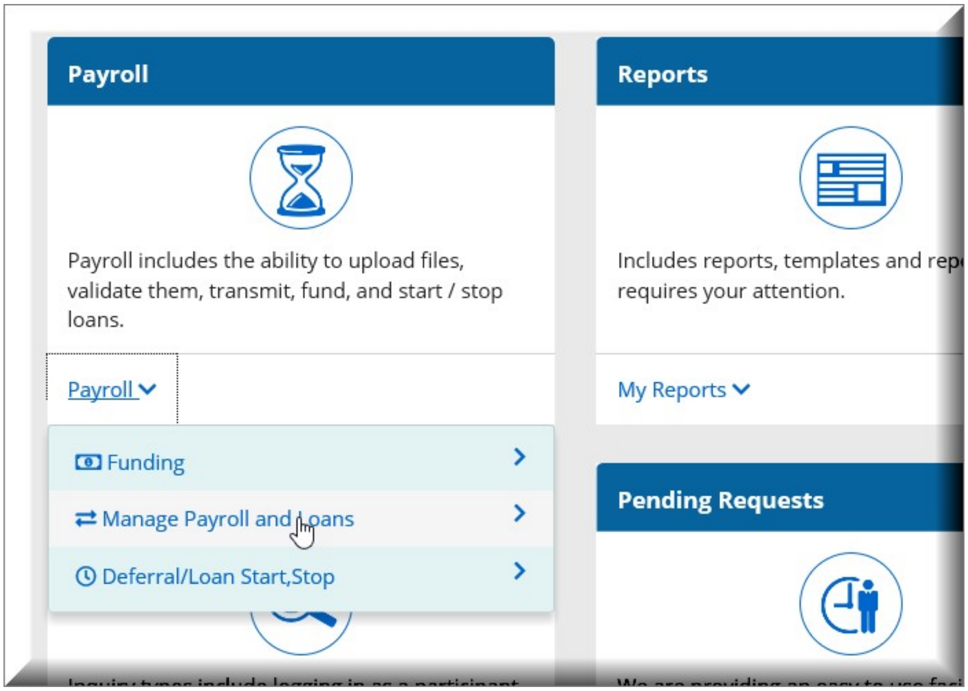
FIVE EASY STEPS TO UPDATE A PARTICIPANT RECORD

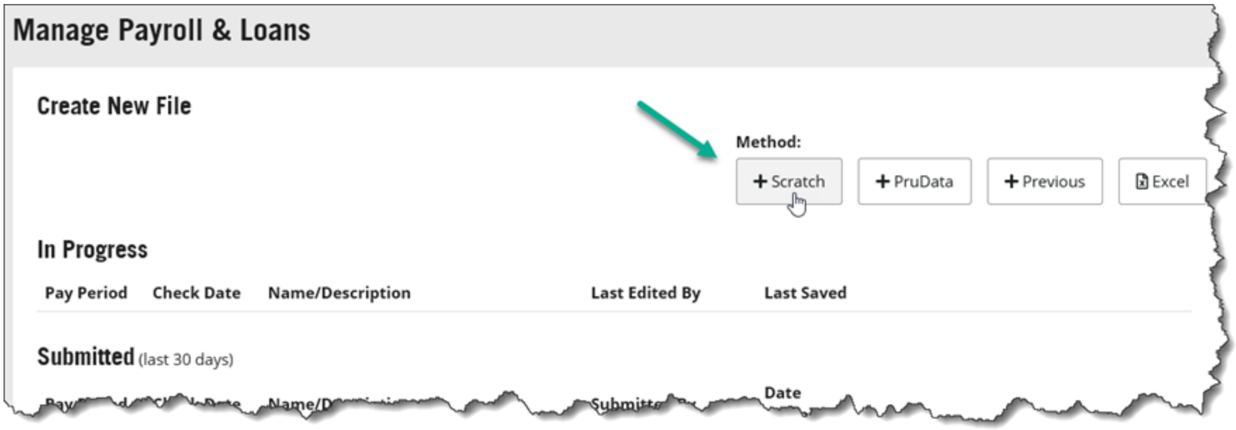
Step #1 –

(if you have multiple plan access, select the desired.) Go to the Payroll Tile, click on the word Payroll, and then select 'Manage Payroll and Loans'.



Step #2 –

Choose the 'Scratch' method.

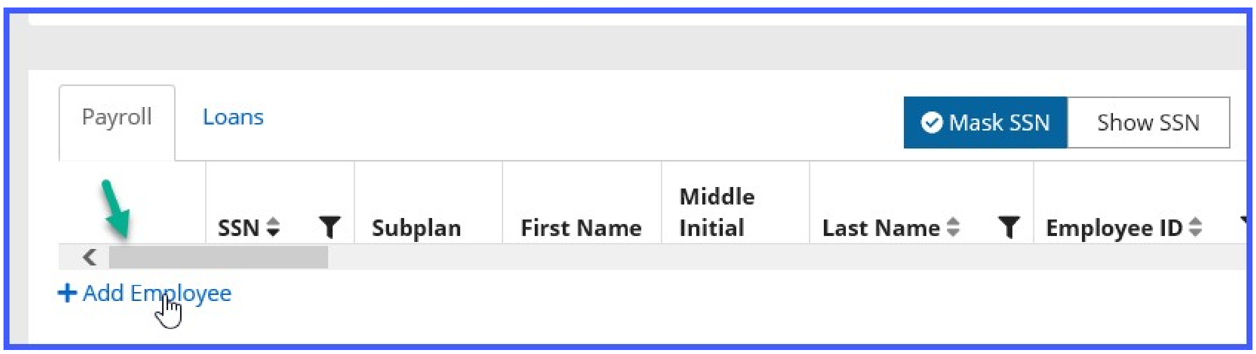


Step #3 –

Assign a name to the file. This is for your reference only and can be anything you want it to be. Populate Pay Period End Date and Check Date with current date, then click on 'continue'.

Step #4 –

Click on the 'Add Employee' link, and then enter the SSN(s) of the participant(s) you are updating. After you have entered the SSN and clicked on the search icon, our system will bring them up; click on 'Add Employee' to bring them into this file. Do this for all participants you want to update.



Step #5 –

Scroll to the right until you find the field you need to update. After all the updates have been made, click 'continue' until you get to the end where you can click on the 'submit' option. This page should reflect $0.00 for contributions/loans as is non-financial submission. A confirmation message that the file was submitted for processing is provided.

Depending on when you submit the file, updates will occur that evening or else the next night.

IMPORTANT ITEMS TO NOTE

- When making participant updates via the Sponsor Center, you must remember to also update your system(s) to avoid overlaying the updated data.
- You will always use current date for Check Date and Pay Period End Date when submitting participant updates.
- Validations will run behind the scenes to ensure data integrity. It will detect if there is any missing, inaccurate or incomplete data. You will be prompted to fix the perceived bad data with each data element needing attention being flagged for review.
  - Red = Critical errors and must be corrected before being able to proceed with submission.
  - Orange = Warning errors and appear to be suspicious. You may proceed with processing without correcting data.
- When updating an employee's status such as terminating, you will need to update two fields
  - Employee status field (i.e. terminated status); and,
  - Employee status date (i.e. term date)
- When updating an employee to leave or return from leave, you will need to update two fields:
  - Sub Status (Leave Start or Leave Return); and,
  - Sub Status Date (leave start or leave return date)
  - Anytime you update an employee to leave of absence, their account status **should remain as active.**
- Final page prior to submission will reflect $0 for contribution and loans.