



Voya PayCloud
User Guide

May, 2023

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Document Information

This document is maintained by Retirement Services Division of Voya Financial™.

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Introduction

Overview

Voya PayCloud is an easy-to-use remittance processing tool available through Sponsor Web Applications. This electronic payroll interface automatically reconciles the data you provide to your record keeper with its record keeping system, giving you complete control over payroll processing accuracy.

Depending on our plan settings, you'll use Voya PayCloud to submit and fund payroll contributions, and/or loan repayments and if applicable, enroll eligible participants and update participant demographic data. Voya PayCloud has built-in edit functionality to ensure that accurate and valid data is received. Some functions shown may not be available depending on your plan's setup. If you have any questions, please contact your Account Manager.

Features

Voya PayCloud is easy to use with clearly labeled pages. Voya PayCloud enables you to perform the following functions:

- Paperless (electronic) transactions
- Send payroll contributions and loan repayments. Refer to the Contributions Section & Loan Repayment Section
- Enroll new participants into the plan (if applicable) or add demographic data for those participants who will enroll in the future (if applicable). Refer to the Add/Enroll Section
- Update demographic data for enrolled participants. Refer to Participant Update Section or Provide payroll funding via the Automated Clearing House (ACH). Refer to the Banking Information or Section for additional detail

For more information, see *System Security Overview*

Hints and Tips

Do **NOT** use the **BACKSPACE** key on your keyboard to navigate through the entry fields on Voya PayCloud screens; it will cause you to lose all the data you have entered by returning to the previous screen without saving. Instead, use your mouse or arrow keys to move around the screen.

Similarly, do **NOT** use the **BACK** button  in your browser. Use the internal navigation buttons in the system to return to the last screen.

Hours of Availability

Voya PayCloud is available during the hours posted on your plan's Welcome page. Scheduled maintenance may interrupt accessibility.

Gaining Access to Voya PayCloud

To access Voya PayCloud, you are required to complete a Sponsor Web Activation Request form. Contact your Plan Manager for more details.

You can only access clients and divisions for which you have permission. This may affect file uploads, as any participants in divisions not permitted will appear as errors. Please contact your Plan Manager for questions regarding division access.

To deactivate a user ID and password, please contact your *Plan Manager*. Since Voya PayCloud allows you to access sensitive data, it is important to notify your record keeper immediately if a user ID should be terminated.

For more information, see [System Security Overview](#)

Home

Overview

The Home screen is the entry screen of the Voya PayCloud application and provides a navigation tile for each function of the Voya PayCloud application. Tiles are displayed based on the plan settings. You can select an operation from the tiles shown and navigate to the respective page. You may return to the Home screen from any section within Voya PayCloud by clicking Voya PayCloud link on the top left corner of the screen. Information regarding the availability hours of the Voya PayCloud system is displayed at the bottom of the screen.

Home screen

Voya PayCloud Home

551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

- Add/Enroll**
Add/Enroll participant
- Participant Update**
View/Update participant information
- Batch Participant Update**
Update multiple participants
- Contributions**
Process contributions to accounts
- Pending/Submitted Batches**
Review batch information
- Loan Repayment**
Process loan repayments
- Contributions/Loan Repayment**
Process a file with contributions and/or loan repayment data
- Bank Information**
Add or update assigned bank
- File Upload**
Submit a file with contributions and/or loan repayment data
- Transaction History**
View all the files submitted

The Voya PayCloud will be available during these hours:
Monday through Friday from 7:00 AM - 7:30 PM EST
Saturday from 6:00 AM - 12:00 AM EST
Sunday from 12:00 PM - 7:00 AM Monday EST

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Screen Options

- Click **Change Plan** to go to the Plan Selection screen to select a different plan (if applicable)
- Click **Add/Enroll** to go to the Add/Enroll Participant screens for enrolling participants into the plan
- Click **Participant Update** to go to the Search Participant screen to search for a participant and perform an update

PLAN | INVEST | PROTECT

- Click **Batch Participant Update** to go to the Participant Update screen for making Participant Updates
- Click **Contributions** to go to the Contributions screens for processing contributions to accounts
- Click **Pending/Submitted Batches** to go to the Pending/Submitted Batches screen for reviewing batch information.
- Click **Loan Repayment** to go to the Loan Repayment screens for processing loan repayments
- Click **Contributions/Loan Repayment File Processing** to go to the Contributions/Loan Repayment screens for processing a file with Contributions and/or Loan Repayment data
- Click **Bank Information** to go to the Bank Information screen for adding or updating the assigned bank
- Click **File Upload** to go to the File Upload screens for importing files for processing
- Click **Transaction History** to go to the Transaction History screen for reviewing batch, file upload and online information.



Note: The **Change Plan** link displays only if the user has access to more than one plan within Voya PayCloud.

Help

To view Help information about the screen, click **Help** in the upper-right corner of the screen. This will open the Help contents in a new window.

Logging Off

To log out of Voya PayCloud, click **Exit** in the upper-right corner of the screen. This displays the below screen stating a successful logout of Voya PayCloud. The Sponsor Web Home page will still be open in the first window. Other applications can be accessed at this point, or you can log out from the Sponsor Web application.




Plan Selection

Overview

The Plan Selection screen provides a list of plans and a list of HUB plans if applicable. If either plan list contains more than 25 plans, you will be provided a list of plans for which you have access. If you have access to more than one plan, you can click on or search for the plan you need to submit for

Plan Selection Screen


Voya PayCloud
Help | Exit

List of Plans

Search by: Plan Number

Plan Number	Plan Name
8S2501	Test plan
8S7B0S	SOLUTION PORTFOLIO
55S985	401K PLAN X
55X100	Corp Bonus Plan w AT
81A098	GERDES WHOLESALE &

1 to 100 of 7,904 Page 1 of 80

List of Hub Plans

Search by: Hub ID

Hub ID	Hub Name
HUB_1	BlackBox Hub Hub
HUB_2	Indiana Hub
HUB_3	Iowa Group Hub
HUB_4	3 Source Hub
HUB_5	Black Box Hub Group
HUB_56	TEST
HUB_57	test551214

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The Voya PayCloud will be available during these hours:
Monday through Friday from 7:00 AM - 7:30 PM EST
Saturday from 6:00 AM - 12:00 AM EST
Sunday from 12:00 PM - 7:00 AM Monday EST

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Add/Enroll

Overview

You can use the Add/Enroll section of Voya PayCloud to enroll new participants into the plan, if applicable. You can also use Add/Enroll to add indicative data for new participants who enroll in the future. The Enrollment screens contain data entry fields into which you will enter participant data. If you fail to update a necessary field, the system will prompt you to return to the screen and enter the appropriate data. Click Add/Enroll tile on Home screen to navigate to the Add/Enroll participant pages.

Home screen

The screenshot shows the Voya PayCloud Home screen for plan 551213 - ABC INDUSTRIES. The interface includes a header with the VOYA FINANCIAL logo, the text 'Voya PayCloud', and 'Help | Exit'. Below the header, it says 'Voya PayCloud Home' and '551213 - ABC INDUSTRIES' with a 'Change Plan' link. A prompt reads 'Select an operation from the tiles shown below'. The main area contains a grid of tiles for various operations: Add/Enroll, Participant Update, Batch Participant Update, Contributions, Pending/Submitted Batches, Loan Repayment, Contributions/Loan Repayment, Bank Information, File Upload, and Transaction History. Each tile has an icon and a brief description of the operation.

The Voya PayCloud will be available during these hours:
Monday through Friday from 7:00 AM - 7:30 PM EST
Saturday from 6:00 AM - 12:00 AM EST
Sunday from 12:00 PM - 7:00 AM Monday EST

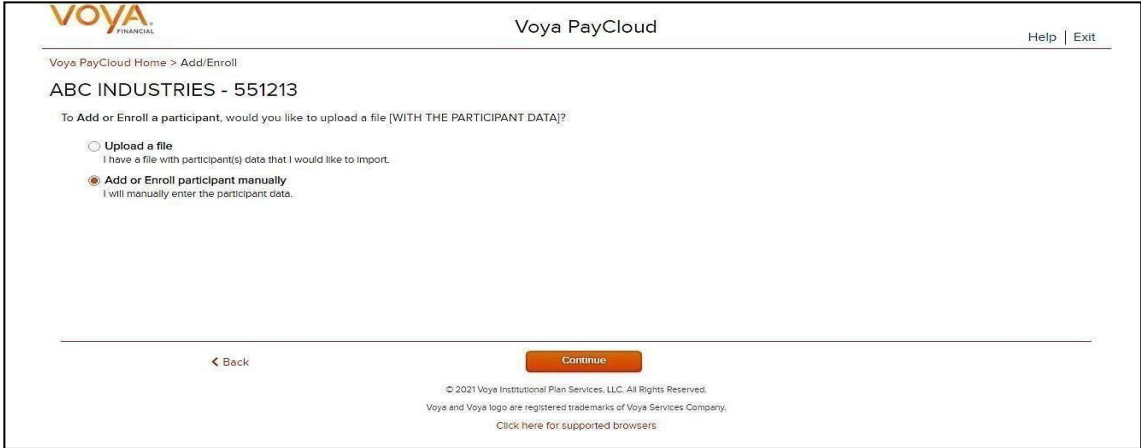
Insurance products, annuities and funding agreements are issued by Voya Retirement Insurance and Annuity Company ("VRIAC"), Windsor, CT. VRIAC is solely responsible for its own financial condition and contractual obligations. Plan administrative services provided by VRIAC or Voya Institutional Plan Services LLC ("VIPS"). VIPS does not engage in the sale or solicitation of securities. All companies are members of the Voya family of companies. Securities distributed by Voya Financial Partners LLC (member SIPC) or third parties with which it has a selling agreement. All products and services may not be available in all states. All companies are members of the Voya family of companies.

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Click here for supported browsers

Import File Screen

The plan must have Enrollment import activated to use this feature. If active, the first screen upon clicking the Add/Enroll Tile from the Home Screen will provide an option to import an Enrollment File. To use the Import File Feature, you must use Internet Explorer version 7.0 or higher.

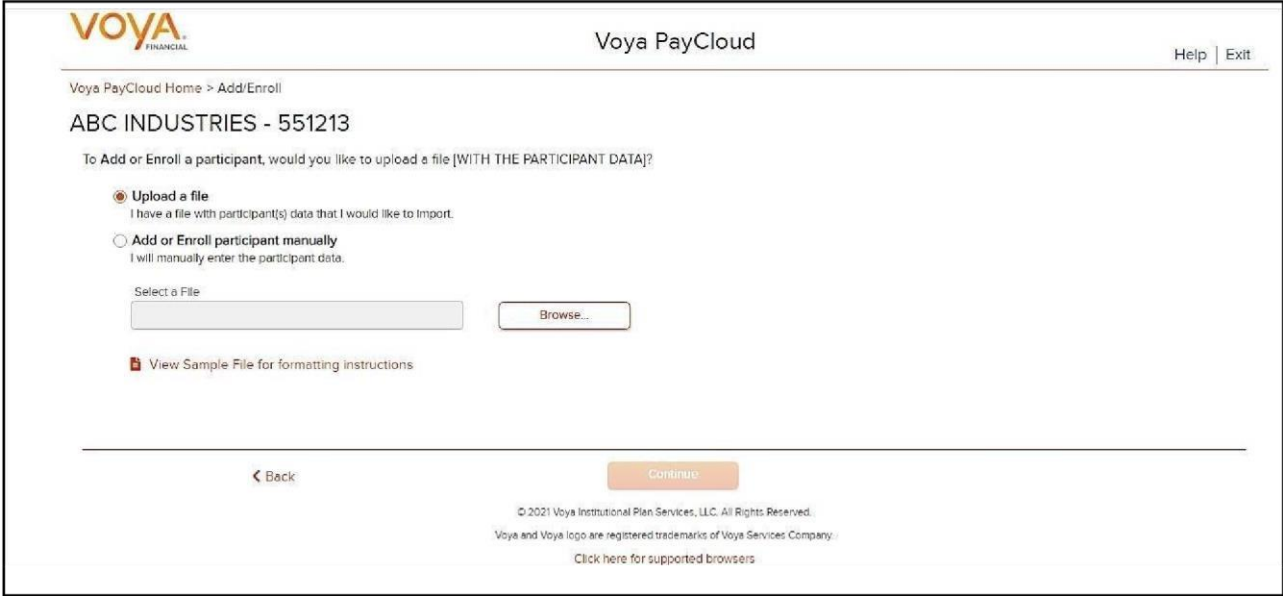
Import File screen – Option ‘Add or Enroll participant manually’ selected



Screen Options

- Select Add or Enroll participant manually and click the Continue button to begin the individual enrollment process
- Select Upload a file to select an enrollment file to import • Select **Back** to return to the Home screen

Import File screen – Option ‘Upload a file’ selected



Screen Options

- Click **Browse** to select an enrollment file to import
- Click **View Sample File for formatting instructions** to open a PDF file showing formatting rules
- Click **Back** to return to go to the Home screen • Click **Continue** to go to the Templates screen

File Browse

The file type must be one of the following formats:

- Excel spreadsheet (.xls, .xlsx and .xlsm)
- Comma delimited file (.csv)
- Plain text (.txt)
- .fix
- .dat
- .mdo
- .md5
- .pay
- .wk3
- .wk4
- .prn

Rules

- The imported file size must be greater than zero and less than 5MB.
- All SSNs must have nine digits; leading zeroes must be included.



Note: When you are in the process of creating a template, and attempt to change screens, you will be prompted to save the template.

Enrollment Import Formatting Rules

The Enrollment Import feature is used as an alternative for manually entering data on the Enrollment screen to add employee data to the system from a prepared file.

When importing a file, verify that the template you selected contains the correct number of columns to accommodate the number of columns in the file so the file data formats correctly. You can add columns to an existing template or, if necessary, click **Create New Template** to create a new template that matches the format of the imported file.

Required Fields and Formatting

All fields/cells should be formatted as text.

Fields

Social Security Number	Must be nine digits. Leading zeros must be included. Acceptable formats: 999-99-9999, or 999999999.
------------------------	---

Participant Name Change

If the Social Security number format does not contain hyphens, make sure that the field is formatted as text. In MS-Excel, a green triangle indicates that you have stored values as text.

Full Name: Separate fiels/columns are required for Last Name, First Name and Middle Initial. Last Name+ First Name + and Middle Initial fields cannot exceed 30 characters when combined

Address Line 1

Maximum 40 characters.

Address Line 2

Maximum 40 characters.

City

Maximum 28 characters.

State Code

2 characters are required if the country is USA or Canada.

Postal Code

Applicable only if country is USA or Canada.
USA ZIP codes may consist of 5 or 9 digits (no dashes).
Canadian postal codes contain 6 characters.

Eligibility and Status Information

Birth Date

Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY. Eight digits are required.
Leading zeros in months must be included. For example, 02 for February, not 2.

Employee must be between 15 and 75 years of age for employment.

Hire Date

Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY.
Eight digits are required.
Leading zeros in months must be included.

Plan Entry Date

Defaults to the current date..

Division Codes	Four-digit division code. If you receive the error "Participant not in authorized division/location," Please validate the division/location you entered. If you have entered the correct division/location, please contact your plan manager.
----------------	---

Payroll Frequency	Formatted as one digit: 4 - Monthly 5 - Semi-monthly 6 - Bi-weekly 7 - Weekly May be optional depending on plan rules.
-------------------	--

Optional Data

If any optional fields are blank, or contain only a hyphen, Voya PayCloud bypasses the field completely. For the purposes of investment election, a blank is the same as a zero (0.00). Blank dollar amount fields are bypassed for Contribution and Loan Repayment import files.

Fields

Actual hours, plan year-to-date Accumulate option (special set-up required). The amount submitted is added to the existing (for vesting purposes) total.
Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Anniversary hours (for plan existing eligibility rules) Accumulate option (special set-up required). The amount submitted is added to the total.

Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Current Hours (plan year or Accumulate option (special set-up required). The amount submitted will add to the total that anniversary hours) exists on the system.

Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Annual Salary Do not include dollar signs or commas (for example: 45000.00).

Submit in whole percentages only.

Special set-up required for fractional amounts.

Deferral Amount	Must include decimal point, limit to two digits after the decimal. Do not include % or commas. Example: 250.00. Submit in whole percentages only. Special set-up required for fractional amounts.
-----------------	---

Deferral Percentage (if required Must include decimal point; limited to two digits after the decimal by your plan)
Do not include % symbol (for example 10.00, 50.00, 40.00).

Investment Elections must total 100.00%.

Investment Elections

Submit in whole percentages only. Special set-up required for fractional amounts.

Must include decimal point; limited to two digits after the decimal.

Do not include % symbol (for example 10.00, 50.00, 40.00).

Investment Elections must total 100.00%.

Eligibility Exclusion

One character

- Y - Exclude participant from eligibility
- N (or blank) - Process participant for eligibility.

Default Enrollment

Formatted as one character.

- (Y) - Enroll participant into the plan's default investment fund
- (N) or blank - Enroll participant using investment fund supplied on file

QDIA Default Enrollment

Formatted as one character.

- (Y) - Enroll participant into the plan's QDIA option
- (N) or blank – Enroll participant using investment fund supplied on file

Employee Number

Maximum 13 characters.

Gender

One character format:

- 1 - Male
- 2 - Female

.CSV-files must be comma delimited. Quotation marks must be removed from any values containing either single (') or double quotation (" ") prior to being imported into Voya PayCloud.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	SSN-(format as text or hyphen to maintain lead zeros)	LastName	First Name	MI	Addr1	Addr2	City	State	Zip Code (maintain lead zeros)	DOB-required	DOH-required	Plan Entry Date-if required	Division/Location	PAYFREQ 4=Month 5=Semimonth 6=Bi/Week 7=Week	Emp. #
1															
2	12345678	SAMPLE	JOE	R	1 MAIN ST	APT #2	WINDSOR	CT	060950001	01011980	01012000	01012000	0001	6	012345
3	010-23-6547	DOE	JANE	R	1 MAIN ST		WINDSOR	CT	06095	01011982	01012001	01012001	0001	6	123456

Enrollment Import File Sample in MS Excel Format

```

Import.csv - Notepad
File Edit Format View Help
SSN,LastName,First Name,MI,Addr1,Addr2,City,State,Zip ,DOB,DOH,Plan Entry Date,Division/Location,PAYFREQ,Emp number
900123456,SAMPLE,JOE,R,1 MAIN ST,APT #2,WINDSOR,CT,060950001,01011980,01012000,01012000,0001,6,012345
010-23-6547,DOE,JANE,R,1 MAIN ST,,WINDSOR,CT,06095,01011982,01012001,01012001,0001,6,123456
    
```

Batch Participant Import Formatting Rules

The Batch Participant Import feature is used to update census data for multiple employees at one time, on one screen. The Enrollment Import feature is used as an alternative for manually entering data on the Enrollment screen to add employee census data to the system from a prepared file.

Social Security Number

Must be nine digits.

Leading zeros must be included.

Acceptable formats: 999-99-9999 or 999999999.

If the Social Security number format does not contain hyphens, make sure that the field is formatted as text. In MS-Excel, a green triangle indicates that you have stored values as text.

Full Name

Separate fields/columns are required for Last Name, First Name and Middle Initial.

Last Name+ First Name + and Middle Initial fields cannot exceed 30 characters when combined.

Address Line 1

Maximum 40 characters.

Address Line 2

Maximum 40 characters.

City

Maximum 28 characters.

State Code

2 characters are required if the country

is USA or Canada.

Postal Code

Applicable only if country is USA or Canada.

USA ZIP codes may consist of 5 or 9 digits (no dashes).

Canadian postal codes contain 6 characters.

Birth Date

Acceptable formats: MM-DD-YYYY,

MM/DD/YYYY or MMDDYYYY.

Eight digits are required.

Leading zeros in months must be included. For example, 02 for February, not 2.

Employee must be between 15 and 75 years of age for employment.

Hire Date

Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY.

Eight digits are required.

Leading zeros in months must be included.

Plan Entry Date

Defaults to the current date

Termination Date	Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY Eight digits required-Lead zero in months must be maintained
------------------	--

Termination Reason Must include one of the following valid values:
 V - Voluntary
 1 – With Cause
 2 – Laid Off
 3 – Special
 4 – Retirement
 5 – Permanent Disability 6 – Death

Current Hours (plan year or anniversary Accumulate option (special set-up required). The amount submitted will add to the hours total that exists on the system

Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Eligibility Exclusion	One character <ul style="list-style-type: none"> Y - Exclude participant from eligibility N (or blank) - Process participant for
-----------------------	---

Vesting Information Actual hours, plan year-to-date (for Overlay method – values should be accumulated year-to-date. vesting purposes)

Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Current Hours (plan year or anniversary hours)	Accumulate option (special set-up is required). The amount submitted is added to the existing total. Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.
--	---

Vesting Date Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or

MMDDYYYY. Eight digits required; Lead zero in months must be maintained. If vesting method is not based on date of

Payroll Frequency Formatted as one digit:
 4 – Monthlv
 5 – Semi-monthlv
 6 – Bi-weeklv
 7 – Weeklv

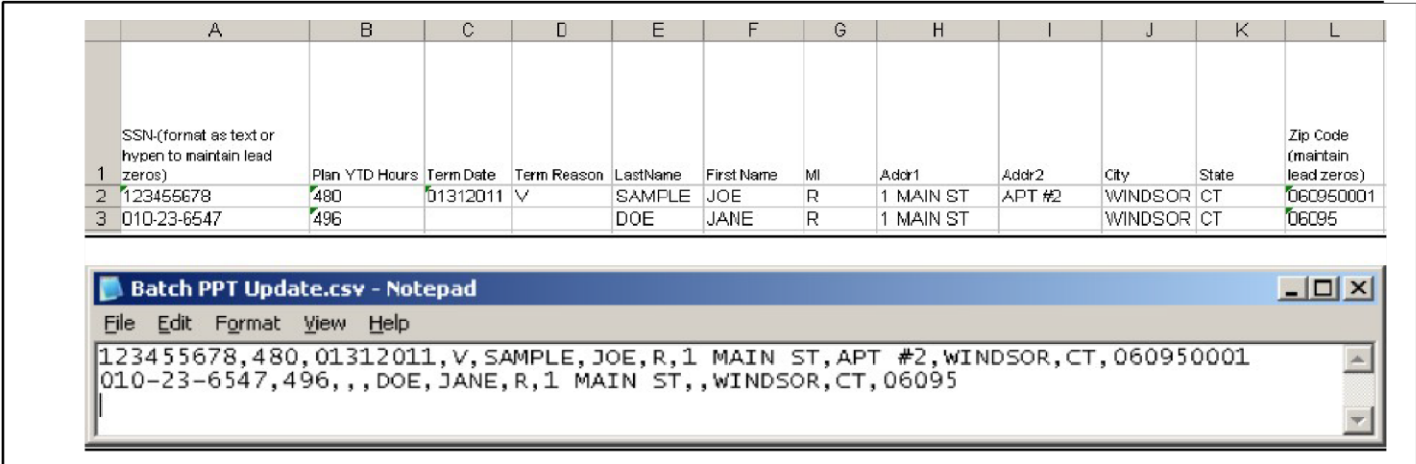
May be optional depending on the plan rules

Other Data Elements that Apply to Your Plan

Annual Salary Must include decimal point. limit to 2 digits after the decimal.
 Do not include dollar signs or commas. Sample: 999.99

Gender Formatted as one digit
 (1) Male (2) Female

Marital Status Formatted as one digit
 (1) Single (2) Married



hire, populate vesting date based on your calculations, otherwise populate with date of hire. See the "Rehire Fields" section for more information

Years of Service Maximum 2 digits

Payroll Remittance

Division Codes Four-digit division code. If you receive the error "Participant not in authorized division/location", please validate the division/location you entered. If you have entered the correct division/location, please contact your plan manager.

Contribution Import Formatting Rules

- All fields/cells should be formatted as text.
- In MS-Excel; a green triangle indicator in the cell signifies that you have stored values as text.
- Comma Separated File (*.CSV)-files must be comma delimited. Quotation marks must be removed from any values containing either single (' ') or double quotation (" ") prior to being imported.
- Fixed width files are acceptable. The same formatting rules apply to each field as Excel or (*.CSV).
- Some data categories will only be accepted by the system if they are allowed by the plan rules. For special circumstances, additional categories may be available or required but not listed in this document.
- Indicate negatives with minus sign to the immediate left of the amount, no parenthesis. For example: - 9999.99.
- Verify participant’s account balances prior to submitting adjustments with negative values. Accounts are subject to change and market value fluctuation.
- Confirm that all employees on the spreadsheet are entered into the system and that the enrollment process is complete.
- Loans can be included on the same spreadsheet, but will need to be imported separately using the Loan Repayment function. A stand-alone spreadsheet for loan repayments is required if a participant repays more than one loan number at a time. To see an example of this, click the Loan View Sample File PDF link on the Loan Repayment Import screen.
- Import multiple payroll dates separately.
- If there are header/trailer lines, they must be identified when creating the template. Rows must be consecutive. Remove any blank rows.

Data Fields and Formatting

All fields/cells should be formatted as text.

Social Security Number	<p>Must be nine digits.</p> <p>Leading zeros must be included.</p> <p>Acceptable formats: 999-99-9999 or 999999999.</p> <p>If the Social Security number format does not contain hyphens, make sure that the field is formatted as text. In MS-Excel, a green triangle indicates that you have stored values as text.</p>
------------------------	---

Participant Name Not required

Contribution Source Columns	<p>If the file does not contain decimals (values are implicit—see below), check the box labeled</p> <p>“Check this box if dollar amounts in the file do not have decimal points” when mapping. Do not include dollar signs or commas. Acceptable formats can either be:</p> <ul style="list-style-type: none"> • Explicit: 999.99 • Implicit: 99999 (the two rightmost digits are cents)
-----------------------------	--

four-digit division code. If you receive the error “Participant not in authorized division/location,” please validate the division/location you entered. If you have entered the correct division/location, please contact your plan manager.

Actual hours, plan year-todate • (for vesting purposes) •	<p>Overlay method – values should be accumulated year-to-date. Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.</p>
---	--

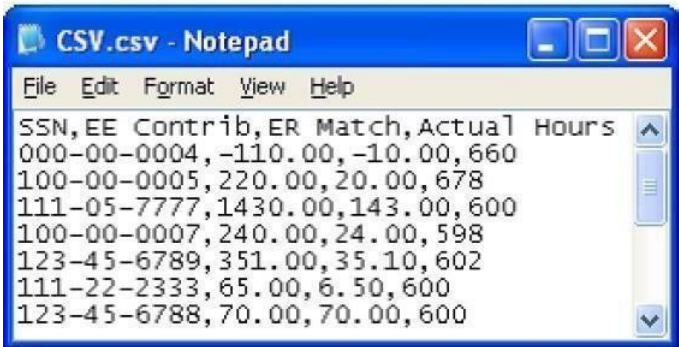
Anniversary Hours (for plan • Overlay method – values should be accumulated year-to-date. eligibility rules) • Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the

right of the decimal.

Current Hours (plan year or anniversary hours)	<ul style="list-style-type: none"> Accumulate option (special set-up required). The amount submitted is added to the existing total. Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.
Termination Date	<ul style="list-style-type: none"> Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY Eight digits required-Lead zero in months must be maintained
Termination Reason	<p>Must include one of the following valid values:</p> <ul style="list-style-type: none"> V - Voluntary 1 – With Cause 2 – Laid Off 3 – Special 4 – Retirement 5 – Permanent Disability 6 – Death

	A	B	C	D
1	SSN	EE Contrib	ER Match	Actual Hours
2	000000004	10.00	10.00	660
3	100000005	20.00	20.00	678
4	111057777	30.00	30.00	600
5	100000007	40.00	40.00	598
6	123456789	50.00	50.00	602
7	111222333	60.00	60.00	600
8	123456788	70.00	70.00	600
9				

Contribution Import File Sample in MS Excel Format



Contribution Import File Sample in .CSV Format

Loan Repayment Import Formatting Rules

- All fields/cells should be formatted as text.

- In MS-Excel; a green triangle indicator in the cell signifies that you have stored values as text.
- Comma Separated File (*.CSV)-Files must be comma delimited. Quotation marks must be removed from any values containing either single (' ') or double quotation (" ") prior to being imported.
- Fixed width files are acceptable. The same formatting rules apply to each field as Excel or (*.CSV).
- Contributions can be included on the same spreadsheet as loans, but will need to be imported separately using the Contribution function. For an example of this, click the Contribution View Sample File PDF file link on the Contributions Import screen.
- A stand-alone spreadsheet for loan repayments is required if a participant repays more than one loan number at a time.
- Import multiple payroll dates separately.
- If there are header/trailer lines, they must be identified when creating the template. Rows must be consecutive. Remove any blank rows.
- Refer to the loan amortization schedule for the payment amount and loan number.
- Payments must be the exact payment amount or an exact multiple of the scheduled repayment.
- Negatives and adjustments are not permitted to loans.

Data Fields and Formatting

Fields/cells should be formatted as text.

Social Security
Number

Must be nine digits.

Leading zeros must be included.

Acceptable formats: 999-99-9999 or 999999999.

If the Social Security number format does not contain hyphen, make sure that the field is formatted as text. In MS-Excel, a green triangle indicates that you have stored values as text.

Participant Name Not required

Loan
Repayment
Amount
Column

If the file does not contain decimals (values are implicit—see below), check the box labeled “Check this box if dollar amounts in the file do not have decimal points” when mapping.

Do not include dollar signs or commas.

Acceptable formats can either be:

- Explicit: 999.99
- Implicit: 99999 (the two rightmost digits are cents)

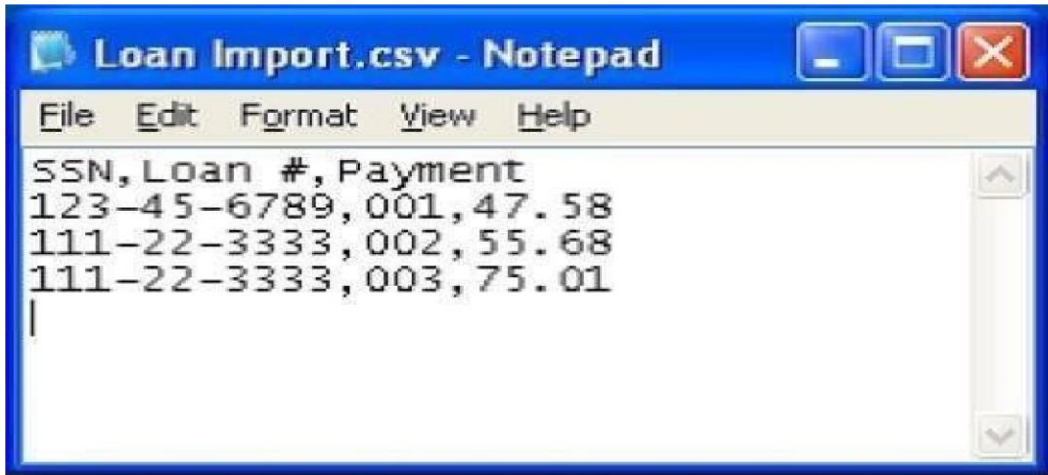
four-digit division code. If you receive the error “Participant not in authorized division/location,” please validate the division/location you entered. If you have entered the correct division/location, please contact your plan manager.

Loan
Number

Three digits required and must include leading zeros. For example: 001, 002, 006.

	A	B	C
1	SSN	Loan acct #	Payment
2	123-45-6789	001	47.58
3	111-22-3333	002	55.68
4	111-22-3333	003	75.01
5			
6			
7			

Loan Repayment Import File Sample in MS Excel Format



Loan Repayment Import File Sample in .CSV Format

Templates Screen

After you've selected **Continue** from the File Browse screen, you'll see the Templates screen. From here you can:

- Select a template
- Add a new template • Delete a template

A template contains the format you define for the import file, including column headings. After you select your file, you'll define which column contains SSN, First Name, Last Name, etc. A new template can be saved, so that you can reuse it or modify it to create another template for the next file import.

Verify that the template you selected contains the correct number of columns to accommodate the number of columns in the file

so the imported file data formats correctly. You can add columns to an existing template or, if necessary, click **Create New Template** to create a new template that matches the format of the imported file.

Templates screen

Voya PayCloud Home > Add/Enroll > Templates

ABC INDUSTRIES - 551213

You can select an existing template or create a new one by selecting from the options below. If you use an existing template, please verify that any new columns added to your file have also been added to the selected template to ensure detail will import correctly.

Please be advised that Division/Location column is required.

Existing Template
Select

Delete

Go

Create New Template

< Back

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Screen Options

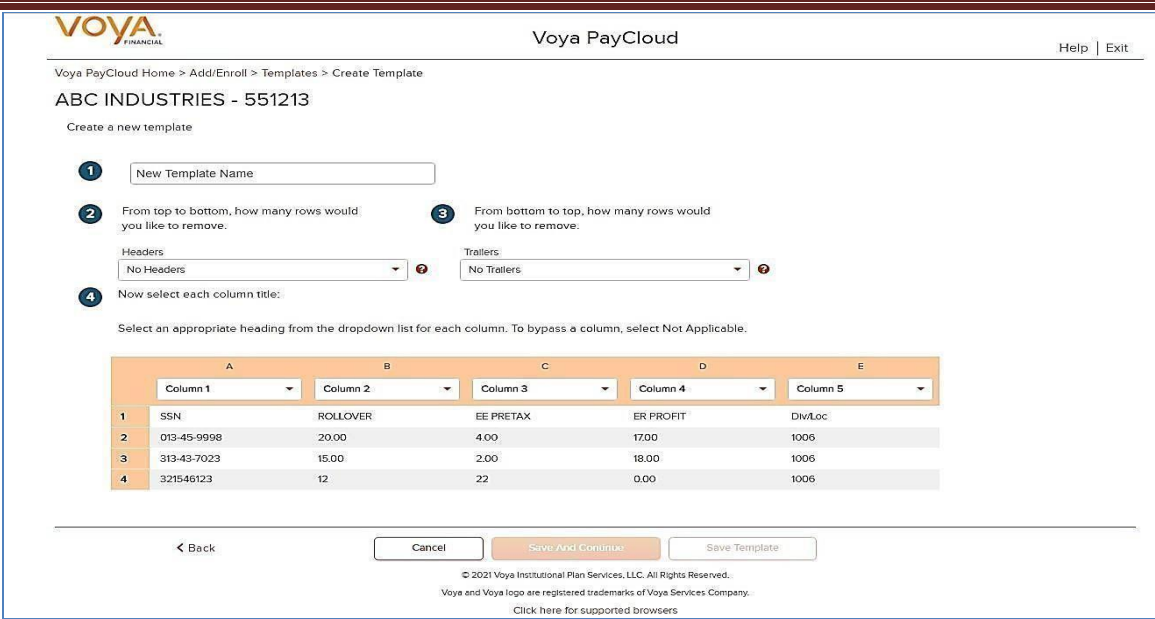
- Select an existing template from the list of saved templates using the drop down.
 - o Click Go after selecting a template to go to the Existing Template screen.
 - o Click Delete to delete the selected template
- Click **Create New Template** to go to the Create Template screen
- Click **Back** to go to the Import File screen

Create Template Screen

You'll see this screen if you selected **Create New Template**. It is used to create a new template for an imported file. When creating a new template the following rules apply:

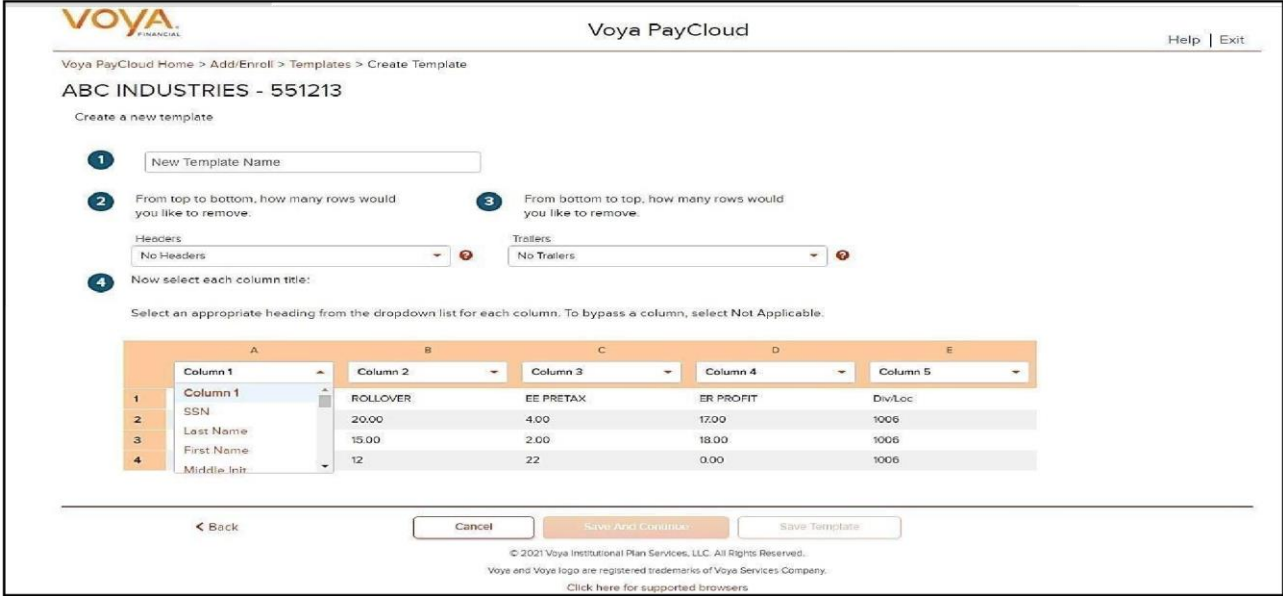
- New template name has a maximum of 15 characters for fixed width files and 20 characters for .csv and excel file formats.
- A maximum of 50 templates can be saved per plan.
- Optional data elements enabled for Enrollment will also be displayed. The override name for the optional data element will be displayed.
- A value of "Not Applicable" will also be displayed to exclude any columns from the imported file.
- The new template may require a "Division/Location" column (If authorized for the plan).
- At any time while you are creating a template, you can click the Save Template button to save your changes.

Create Template screen



You must select a column heading for each column. See the sample images below that illustrate the Column Heading selections and the field definitions for more information.

Create column headings



Fields

New Template Name	Enter a name for the new template
From top to bottom, how many rows would you	like to remove?
	Select the number of header rows contained in the import file. Options include "No Headers" (default), and the values 1-9. When the file is imported, these

headers will be ignored to obtain the file data. They will still appear on this screen to help you select the column headings. Upon clicking the question icon, the following text will display within a pop-up.

“Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”

<p>From bottom to top, how many rows would you like to remove?</p>	<p>Select the number of trailer rows contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”</p>
--	--

<p>Check Box if Dollar Amounts have an Implied Decimal</p>	<p>Column Headings</p> <p>Select a heading name for each column from the drop-down list. The list consists of the basic information such as name and Social Security number, all the optional fields for the plan and an entry for each available source in the plan. To bypass a column, including name, select Not Applicable.</p>
--	--


Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Verification screen
- Click **Save Template** to save the template

Map Column Header Screen

If you import a file other than an Excel or .csv, you will see a screen to select columns to appear in your new template.

Map column header screen - New Template


Voya PayCloud
Help | Exit

Voya PayCloud Home > Add/Enroll > Templates > Test Template 1 Template

ABC INDUSTRIES - 551213

Existing Template

2 From top to bottom, how many rows would you like to remove: 3 From bottom to top, how many rows would you like to remove:

Headers: Trailers:

4 Now select each column title:

This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.


	A	B	C	D	E	F
	SSN	Not Applicable	First Name	Last Name	Address1	City
1	SSN	DIVSUB	FNAME	LNAME	ADDRESS	CITY
2	999984310	1	TESTFIRST	TESTLAST1	123 MAIN	ANY
3	999984311	1	TESTFIRST	TESTLAST2	123 MAIN	ANY
4	999984312	1	TESTFIRST	TESTLAST3	123 MAIN	ANY
5	999984313	1	TESTFIRST	TESTLAST4	123 MAIN	ANY

< Back
Cancel
Save And Continue
Save Template

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You can add template fields by selecting Field Type, Starting Position and Field Length. Click **Add Field** to add the field. The added fields will appear in the section below. You can either **Edit** or **Delete** an added field. Click **Update Data** to upload the data from the import file.

Map column header screen - Existing Template


Voya PayCloud
Help | Exit

Voya PayCloud Home > Add/Enroll > Templates > New Template Template

ABC INDUSTRIES - 551213

Create new template

Existing Template:

2 From top to bottom, how many rows would you like to remove. Headers: 3 From bottom to top, how many rows would you like to remove. Trainers:

4 Now select each column title:

Add template fields

Field Type: Starting Position: Field Length:

Field Name	Starting Position	Field Length	
SSN	5	10	Edit Delete
First Name	16	5	Edit Delete
Address1	22	10	Edit Delete
City	33	5	Edit Delete

Uploaded Data

SSN	First Name	Address1	City
TIN	CLNT_	O L	NAME
39-036700	55979	0001 A	ANDVI
39-036700	55979	0001 A	OSTIN
39-036700	55979	0001 A	MED-Y
39-036700	55979	0001 A	DEBIO
39-036700	55979	0001 A	TLL

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Fields

Field	Description
Existing/New Template Name	Enter the new template name or update the existing template name
From top to bottom, how many rows would you like to remove?	<p>For a new template, the number of headers can be selected. Upon clicking the question icon, the following text will display within a pop-up: "Select the number of headers contained in the import file. Options include "No Headers" (default), and the values 1-9. When the file is imported, these header fields will be ignored."</p> <p>For an existing template, headers associated with the field will be prepopulated and are updateable</p>
From bottom to top, how many rows would you like to remove?	<p>For a new template, the number of trailers can be selected. Upon clicking the question icon, the following text will display within a pop-up: "Select the number of trailers contained in the import file. Options include "No Trailers" (default), and the values 1-9. When the file is imported, these trailer fields will be ignored."</p> <p>For an existing template, trailers associated with the field will be prepopulated and are updateable</p>
Field Type	Dropdown listing all fields defined for input
Starting Position	Enter starting position for the Field Type
Field Length	Enter width for the Field Type

Screen Options

- Click **Back** to go to the Templates screen
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Verification screen • Click **Save Template** to save the template

Existing Template Screen

If you select an existing template you will see the screen below. Existing templates can be modified and saved. Simply make any changes you need to make to any editable field, just as in the new template screen.

Existing Template screen

Voya PayCloud Home > Add/Enroll > Templates > Tem_Enroll_15Jan Template

ABC INDUSTRIES - 551213

1 Existing Template
Tem_Enroll_15Jan

2 From top to bottom, how many rows would you like to remove.
1

3 From bottom to top, how many rows would you like to remove.
No Trailers

4 Now select each column title:
This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E
	SSN	Last Name	First Name	Address1	City
1	SSN	ROLLOVER	EE PRETAX	ER PROFIT	Div/Loc
2	013-45-9998	20.00	4.00	17.00	1006
3	313-43-7023	15.00	2.00	18.00	1006
4	321546123	12	22	0.00	1006

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Fields

Field	Description
Existing Template	Template name
From top to bottom, how many rows would you like to remove?	The number of headers can be selected. Upon clicking the question icon, the following text will display within a pop-up. "Select the number of headers contained in the import file. Options include "No Headers" (default), and the values 1-9. When the file is imported, these header fields will be ignored."
From bottom to top, how many rows would you like to remove?	The number of trailers can be selected. Upon clicking the question icon, the following text will display within a pop-up. "Select the number of trailers contained in the import file. Options include "No Trailers" (default), and the values 1-9. When the file is imported, these trailer fields will be ignored."

Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Verification screen
- Click **Save Template** to save the template

Error Corrections

In case of errors upon clicking **Save and Continue**, the screen appears as below. Click **View Error Messages** to get a detailed view on the errors. A pop-up will display showing the error. All fields can be edited on this screen by manually clicking in the cell and typing the correct data.

Error Messages screen

Voya PayCloud

Voya PayCloud Home > Add/Enroll > Templates > Test Template 1 Template

ABC INDUSTRIES - 551213

Template last saved on Tuesday, November 23rd, 2021 02:14:16 PM

View Error Messages

Existing Template

1 Test Template 1

2 From top to bottom, how many rows would you like to remove.

3 From bottom to top, how many rows would you like to remove.

Headers: 1 Trailers: No Trailers

4 Now select each column title:

This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E	F
	SSN	Not Applicable	First Name	Last Name	Address1	City
1	SSN	DIVSUB	FNAME	LNAME	ADDRESS	CITY
2	999984310	1	TESTFIRST	TESTLAST1	123 MAIN	ANY
3	999984311	1	TESTFIRST	TESTLAST2	123 MAIN	ANY
4	999984312	1	TESTFIRST	TESTLAST3	123 MAIN	ANY
5	999984313	1	TESTFIRST	TESTLAST4	123 MAIN	ANY

Back Cancel Save And Continue Save Template


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Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** after correcting errors to re-validate. Based on successful validation you will be taken to the Verification screen
- Click **Save Template** to save the template

This screen opens in a new window to display the errors from the imported file. Use these messages as a guide to errors.

Error Message Details

Errors
 Print

SSN	Name	Error
91345678X	John,Smith	Birth Date is not a date.
91345678X	John,Smith	Hire Date is not a date.
91345678X	John,Smith	The zip code entered is not valid for the state selected.
91345679X	Joe,Matthews	Birth Date is not a date.
91345679X	Joe,Matthews	Hire Date is not a date.
91345679X	Joe,Matthews	The zip code entered is not valid for the state selected.

Done

Screen Options

- Click **Print** to print the errors
- Click **Done** to close the pop-up and return to the Create Template screen for correcting the errors

Error Messages

Validations and corresponding error messages include:

Error Messages	Validations	Notes
“Batch Total Must Be Greater Than Zero”	Verify that the total hours and contributions in a contributions file are greater than zero.	Total hours and contributions must be greater than zero.
“Division/Location Column Required”	Verify that a “Division/Location” column is selected.	This plan requires a “Division/Location” column.
“Loan number cannot exceed 3 digits”	Verify that <field> is <number> digits.	Add lead zeros if loan number is less than 3 digits.


<p>“Loan payment amount should be equal to the expected amount or a multiple of the expected amount”</p>	<p>Appears if Loan Matching is enabled in the Admin section and loan amount is not equal to the payment amount or is not a multiple.</p>	<p>The error message will display the column heading.</p>
<p>“Participant Division/Location Required”</p>	<p>Appears if the import file does not include Division/Location code values for each participant.</p>	<p>Appears if a participant is missing a Division/Location (which is required).</p>
<p>“Participant Not in Authorized Division/Location”</p>	<p>Verify that the participant’s division code is correct.</p>	<p>You cannot import a participant for a division that you are not authorized for.</p>
<p>“The participant has an invalid date of birth. We are unable to determine the correct Voya Lifetime Investment Protection (VLIP) fund. Please reenter the date of birth.”</p>	<p>Verify that the date of birth is correct, in the correct format (MM-DDYYYY) and falls within the VLIP DOB range.</p>	<p>This error appears if a VLIP fund is chosen and the DOB field is left blank or the format is incorrect. Participants enrolling in these funds are automatically enrolled into their age-appropriate VLIP vintage (fund).</p>
<p>“This participant currently has both \$ and % election types on file. Contribution election types must match across all sources. Please call 1800-238-6212 (select option 0 and then option 2 for Voya PayCloud) for assistance.”</p>	<p>Verify that the contribution election types already on file are the same for all sources, on a per-participant basis (either all dollars or all percents).</p>	<p>This appears if contribution election types (\$ or %) are inconsistent among the different sources, for a given participant.</p>
<p>“xx-xx-xxxx - Social Security number must be 9 digits.”</p>	<p>Verify that the SSN has nine digits.</p>	<p>SSN is not nine digits.</p>
<p>“xxx-xx-xxxx- Participant Social Security number not found.”</p>	<p>Verify that the SSN exists in the plan.</p>	<p>Appears if the SSN not in the recordkeeping system.</p>
<p>Example “<Field> cannot be negative”</p>	<p>Verify the amounts do not have negatives or parenthesis.</p>	<p>The error message will display the column heading.</p>

<p>Example “<Field> is limited to two decimal places”</p>	<p>Verify that the dollar amounts do not have more than 2 decimal places.</p>	<p>The error message will display the column heading.</p>
<p>Example “Error in column #: <Field> already exists”</p>	<p>Verify that the same column heading has not been selected twice.</p>	<p>The error message will display the column heading and the expected length.</p>
<p>Example: “Select heading for column 2”</p>	<p>Verify that column headings have been selected.</p>	<p>The error message will display the column heading number.</p>
<p>ZIP Code does not match State</p>	<p>Verify that the ZIP code is correct.</p>	

Verification Screen

This is the final step in importing the file. No further changes will be allowed after this screen.

Verification screen (For Enrollment Import)


Voya PayCloud
Help | Exit

Voya PayCloud Home > Add/Enroll > Templates > Test Template 1 Template > Verify Information

ABC INDUSTRIES - 551213

✔ Template last saved on Tuesday, November 23rd, 2021 02:04:33 PM

Existing Template
Test Template 1

1
2

2 From top to bottom, how many rows would you like to remove.

3 From bottom to top, how many rows would you like to remove.

Headers: 1
Trailers: No Trailers

4 Now select each column title:

This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E	F
	SSN	Not Applicable	First Name	Last Name	Address1	City
11	999984319		TESTFIRST	TESTLAST10	123 MAIN	ANY
12	999984320	1	TESTFIRST	TESTLAST11	123 MAIN	ANY
13	999984321	1	TESTFIRST	TESTLAST12	123 MAIN	ANY
14	999984322	1	TESTFIRST	TESTLAST13	123 MAIN	ANY
15	999984323	1	TESTFIRST	TESTLAST14	123 MAIN	ANY

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Screen Options

- Click **Back** to go to the Create Template screen
- Click **Cancel** to go to the Home screen
- Click **Submit** to submit the participant data and go to the Home screen. This may take a few seconds.

Confirmation screen

Voya PayCloud Home > Add/Enroll Confirmation

ABC INDUSTRIES - 551213

Print

Your file has been successfully imported.
 Your enrollment file has been successfully imported on 11/23/2021 at 02:25:29. Information for 14 new participants will be added to our recordkeeping system.
 Select Done to return to the Plan home page.

[← Back](#) [Cancel](#) [Save And Continue](#) [Save Template](#)

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Screen Options

- Click **Print** to print a copy of the Confirmation screen
- Click **Done** to return to the Home screen

Participant Information Screen

Participant Information screen – Default Enrollment option

Voya PayCloud Home > Add/Enroll > Add/Enroll Participant Information

ABC INDUSTRIES - 551213

Add/Enroll a participant in the plan

Social Security Number (NNNNNNNNN)

Last Name First Name MI

Country
 United States of America Zip Code

Date of Birth (MM/DD/YYYY) Date of Hire (MM/DD/YYYY)

Status
 04-Eligible; Not Participate

Enroll this participant


[← Back](#) [Cancel](#) [Continue](#)

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Participant Information screen – QDIA Default Enrollment option

Fields

Field	Description
Email (Optional)	Participant e-mail address
Last Name	Participant last name
First Name	Participant first name
MI (Optional)	Middle Initial
Address Line 1	Participant address
Address Line 2 (Optional)	Participant address
City	Participant City
State	Participant State
Zip Code	Participant Zip Code
Country	Defaults to United States of America. A different country may be selected from the drop-down

Date of Birth	Select from the calendar icon
Date of Hire	Select from the calendar icon
Status	Indicates the participant status under the plan. This field is maintained by Voya.
Enroll this Participant	<p>Checking this box allows you to define contribution and investment elections for the participant. If in doing this you are adding census information in order for your participant to facilitate enrollment on their own; if your plan requires the participant to do this themselves, leave it unchecked.</p> <p>(This option is only displayed if the option is available to your plan.)</p>
Participant elected MorningStar Account Management Program	Displays only if the plan participates in MorningStar program
QDIA default enrollment	<p>Displays if the plan offers QDIA enrollment for participants that are eligible but not participating. If the plan's QDIA is Managed Accounts, you must also select the Morningstar checkbox.</p> <p>You can click on the question symbol for help text. The below information displays within a pop-up.</p>
	<p>“A Qualified Default Investment Alternative (“QDIA”) is an investment alternative or option, as defined under rules issued by the Department of Labor, that has been chosen by the Plan’s fiduciary in those instances when participants fail to provide direction or instruction how to invest monies in their retirement plan account.</p> <p>Check the QDIA default enrollment box to indicate that you are enrolling the employee into the plan's QDIA option. You will need to set up the investment election to the appropriate QDIA option as part of this enrollment transaction.</p> <p>Do not select the QDIA default enrollment box if the employee has submitted a signed enrollment form with any portion of the investment election that uses the QDIA fund. For example, if the employee actively elects 100% to the plan's QDIA option, this is not considered a defaulted investment election. Contact Voya for further information.”</p> <p> Note: This option is not available for all plans.</p>

<p>Is this a Default Enrollment?</p>	<p>Displays if the plan does not offer QDIA default enrollment. You can click on the question symbol for help text. The below information displays within a pop-up.</p> <p>Check the “Is this a Default Enrollment?” checkbox if you are performing a default enrollment to enroll the participant into the plan’s default investment option. You will need to set up and/or confirm the investment election to the appropriate fund based on the plan’s investment option as part of this enrollment transaction.</p> <p>Do not select the default enrollment box if the employee has submitted a signed enrollment form and has made a positive election.</p> <p>Contact Voya for further information</p>
---	---

Screen Options

- Click **Back** to return to the Home screen
- Click **Cancel** to go to the Home Screen
- Click Continue to go to the Additional Information screen

Error Messages

If there are any errors associated with the data you entered, Voya PayCloud will display an error message right are not updated or, in the case of the ZIP code, do not validate properly against the entered state.

Example of a reject message: “Please enter a valid Zip Code.”

VOYA FINANCIAL Voya PayCloud [Help](#) | [Exit](#)

Voya PayCloud Home > Add/Enroll > Add/Enroll Participant Information

ABC INDUSTRIES - 551213

Add/Enroll a participant in the plan

Social Security Number (NNNNNNNNN) Email Address (Optional)

Last Name First Name

Address Line 1 Address Line 2 (Optional)

City State

Country Zip Code
Please enter a valid Zip Code

Date of Birth (MM/DD/YYYY) Date of Hire (MM/DD/YYYY)

Status
04-Eligible; Not Participate

Enroll this participant

< Back
Cancel
Continue

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Enter the missing or erroneous information and click Next. Double-check the ZIP code to make sure it matches the state.

Add/Enroll Additional Information Screen



If your plan requires additional information, a second Participant Enrollment screen is displayed after clicking **Continue** on the Participant Enrollment screen. The fields displayed on this screen will vary depending on the plan setup.

Add/Enroll Additional Information screen

Voya PayCloud Home > Add/Enroll > Add/Enroll Participant Information > Additional Information

ABC INDUSTRIES - 551213

Add/Enroll a participant in the plan

Alt Vest Date (Optional) (MM/DD/YYYY)  

Payroll Frequency (Optional)
Select

Sex
Select

E Mail Address

[< Back](#) [Cancel](#) [Continue](#)

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Fields

Optional data element fields will vary according to plan setup. Some require a particular type of data (alpha, numeric), or offer a drop-down menu with prefilled selections.

Fields vary depending on plan settings and may not reflect all fields in the screen shown above. The Division drop-down has a selection "Other" that will display additional divisions not in the first drop-down. These divisions may be grouped based on the first letter of the division name.

Rehire Fields

If the plan participates in Rehire functionality and the **Rehire Date** field is populated with a valid date and a participant's status is terminated, Voya updates the employee's participation status to Active. The system displays a message reminding you to verify and update vesting information accordingly, as well as advise the employee to set up contribution rates and confirm their investment allocations online. Click **OK** to acknowledge this information and continue with the Participant Enrollment.

For vesting purposes, the **Adjusted Date of Hire/Alternate Vesting Date** field is used to include prior service. The label for this field may be slightly different, depending on the vesting described in your plan document. Click the **question symbol** next to each field for help text.

The following text will display within each pop-up.

Rehire Date Rehire Date should be populated with the employee's most recent hire date. By populating this field (Rehire Date), employees in a terminated status code will be updated to an active status and all applicable termination information will be removed. Please advise the employee that they must establish

their contribution rates and confirm their investment allocations in the plan on line in order to resume contributions to the savings plan.

Voya does not use this field to calculate vesting. Depending on your plan's vesting method and service options you may be required to update additional information to correctly calculate the vested balances for the employee. Contact Voya for further information.

Alternate Vesting Date Your employee's Alternate Vesting Date is a date you use to take into account service for vesting. If applicable, your employee's Alternate Vesting Date is the date that takes into account service prior to the rehire date.

For example, if your Employee's rehire date is January 1, 2007 and you need to take into account an additional one year of service prior to the rehire date, your employee's Alternate Vesting Date would be January 1, 2006.

Adjusted Date of Hire

Your employee's Adjusted Date of Hire is a date used to determine service for vesting and eligibility. If applicable, your employee's Adjusted Date of Hire is the date that considers service prior to the rehire date. For example, if your Employee's rehire date is January 1, 2007 and you need to take into account an additional one year of service prior to the rehire date, your employee's Adjusted Date of Hire would be January 1, 2006.

Screen Options

- Click **Back** to return to the Add/Enroll Participant screen
- Click **Cancel** to go to the Home Screen
- Click **Continue** to go to the Add/Enroll Contribution Elections screen (depending on your plan setup)

Add/Enroll Contribution Elections Screen



Note: This screen will only appear if you selected to enroll this participant on the first screen. If your plan requires participants to enter their own contribution elections, you will not see this screen. Participants will be expected to elect his or her investment elections and deferral percent via the Voya Service Center or the participant Web site.

The appearance of these screens will vary according to your plan settings.

You will be able to select the type (mode) of contributions (dollar amount or percent) and enter the amount or percent for each contribution source. You must use the same contribution election type among the sources. If there are different contribution election types on file for different sources, you'll need to call Voya for assistance.

In this example, the Contribution type is set as Percent for all sources. If your plan is not set to apply elections across all sources, you will be able to select them, as below. If the plan is set to apply the election across all sources, then you will not be able to disable the selection.

If the participant has elected for Morningstar Managed Account program, the following message appears in the Add/Enroll Contributions Elections screen: "The participant has elected the Morningstar Managed Account program. As defined by the Program, the participant's Temporary Investment Election will be

created as indicated below.” If the participant has elected for Morningstar Managed Account program and a default enrollment is performed, the following message appears:

“This participant account has been invested in the following fund based on the plan’s default investment provision. As defined by the Program, the participant’s Temporary Investment Election will be created as indicated below.”

Add/Enroll Contribution Elections screen

The screenshot displays the 'Add/Enroll Contribution Elections' screen for 'ABC INDUSTRIES - 551213'. It includes sections for 'Contribution Elections' with input fields for 'EE PRE TAX' (set to 10.00%) and 'ROTH' (set to 80.00%), and 'Catch-Up Contribution Elections' with a 'ROTH' field set to 85.00%. Below these are 'Investment Elections' with a list of sources: Across ALL Sources Elections, LRI ER Elections, ROTH RLOVER Elections, MURREY ER Elections, PRIORMATCH Elections, ROLLOVER Elections (checked), ER MATCH Elections, LEMAY PS Elections, ROTH Elections (checked), QNEC Elections, TAKEOVER Elections, LEMAY S/H Elections, and PRETX MTCHD Elections. Navigation buttons for '< Back', 'Cancel', and 'Continue' are at the bottom.

Fields

Field	Description
Contributions Election Amount or Percent	The mode of contributions to be used i.e. dollar amount or percent of the Contribution Elections.
Source	The source for the contribution elections.
Catch Up Contribution Election Type	The mode of catch-up contributions to be used for all sources (Percent or Amount)

Catch-Up Source	The source for the catch-up contribution elections.
Investment Elections	The checkbox indicates that investment election will be allocated across all sources.
Source List	List of available sources with a provision to select

Screen Options

- Click **Back** to return to the Add/Enroll Additional Information screen or Participant Information screen
- Click **Cancel** to go to the Home screen
- Click **Continue** to go to the next Add/Enroll Investment Elections Screen depending on the plan settings

Add/Enroll Investment Elections Screen

This screen will vary according to plan settings, and may not appear. It allows you to view the investment elections by fund and amount for the participant. You can search for a Fund Name using the filter box below the Fund Name.

Add/Enroll Investment Elections Screen

The screenshot displays the 'Add/Enroll Investment Elections Screen' for participant 'ABC INDUSTRIES - 551213'. The interface includes a search bar with a dropdown menu set to 'Select' and a search button. Below the search bar is a table with two columns: 'Fund Name' and 'Across ALL Sources'. The table lists several funds, each with a 0% allocation. At the bottom of the table, the 'Total' is shown as 100%. Navigation buttons for 'Back', 'Cancel', and 'Continue' are located at the bottom of the screen. The footer contains copyright information for 2021 Voya Institutional Plan Services, LLC.

Fund Name	Across ALL Sources
American Funds Nw Prspctv R3	0 %
ABC_IC_32	0 %
Long NAmE 33	0 %
Long NAmE 34	0 %
LongName35	0 %
Voya Solution 2035 Port Srv	0 %
Voya Solution 2045 Port Srv	0 %
Voya Solution Income Pt Srv	0 %
Neuberg Berm Real Est Fnd RG	0 %
Total	100 %

Contributions can be allocated to individual funds on this screen.

Fields

Field	Description
Fund Amounts	<p>Displays a percent value in the row for the intended contribution fund. This value is a percentage. For example, if the participant selected an investment election of 15% of their salary and want that to be invested equally into four investments funds, "25" would appear at each fund.</p> <p>The Total field should equal 100. These investments will be made across all sources of money.</p>

If you have chosen to perform a default enrollment for the participant on the Add/Enroll Participant screen, then based on the plan settings the Investment Elections screen will present the Default Investment Option for the plan that the participant has been enrolled into.

Add/Enroll Investment Elections screen – Default Investment Option

Voya PayCloud Home > Add/Enroll > Add/Enroll Participant Information > Additional Information > Contribution Elections > Investment Elections

ABC INDUSTRIES - 551213

This participant has been enrolled to the following fund based on the plan's default investment selection.

Fund Name:
Voya Solution 2050 Portfolio Srv

If there are any questions regarding this default enrollment investment selection, please contact your Plan Manager.

[← Back](#)

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Note: The screen message will vary based on the plan offerings like QDIA default enrollment, plan's QDIA is Managed Accounts and plan is an AAME plan

Screen Options

- Click **Back** to go to Add/Enroll /Investments Elections screen
- Click **Cancel** to go to the Home screen
- Click **Continue** to go to the Add/Enroll Verify screen

Add/Enroll Verify Screen

If all of the information you entered is valid, you will see the following screen.


Voya PayCloud
Help | Exit

Voya PayCloud Home > Participant Update Search Participant > Participant Update Participant Information > Additional Information > Contribution Elections > Investment Elections > Verify Information

ABC INDUSTRIES - 551213

Please verify the following information and press SUBMIT to complete the operation (you may need to scroll down to view the entire page).

Participant Name ST TE-DP	Participant Address PO BOX 363 0,00 LITCHFIELD PARK, AZ 853400363 USA	Social Security Number 347642404
Email Address NICKOLASBARTHOLOMEW-DP@XYZ.COM		
Date of Birth 06/23/1969	Date of Hire 08/01/2011	Status 00-Active And Eligible
E Mail Address NICKOLASBARTHOLOMEW-DP@XYZ.COM		

Contribution Elections Source	Type	Amount
EE PRE TAX	%	4.00
ROTH	%	0.00

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

< Back

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Screen Messages

- If the participant has Morningstar Managed Account program as any part of their contribution elections, the following message appears in the Enrollment Verification screen: “The participant has elected the Morningstar Managed Account program. As defined by the Program, the participant's Temporary Investment Election will be created as indicated below.”
- If the participant has Morningstar Managed Account program as part of the default enrollment, the following message appears in the Enrollment Verification screen: “This participant account has been invested in the following fund based on the plan's default investment provision. As defined by the Program, the participant's Temporary Investment Election will be created as indicated below.”
- For AAME plans participating in default enrollment, the following message appears in the Enrollment Verification screen: “This participant will be enrolled in the plan's Asset Allocation Made Easier default model portfolio. Please allow at least one business day before remitting contributions. If there are any questions regarding this default enrollment investment selection, please contact Voya Plan Manager.”
- If the participant has a Voya Lifetime Investment Protection fund as any part of their contribution elections, the following message appears in the Enrollment Verification screen: “Please note that choosing VLIP for their investment elections will automatically be assigned to the target date vintage that most closely corresponds to their 65th birth date or to the CIT Income Fund if their target date vintage has expired.”
- If the participant has both Morningstar Managed Account program and VLIP as part of their contribution elections, both of the above messages appear.

Screen Options

- Click **Back** to go to Add/Enroll Investment Elections screen without saving any changes o o Click

Cancel to go the Home screen o Click

Edit to go to the Participant Information screen

- Click **Submit** to save the changes and go to the Confirmation screen with the ability to print the screen. A message in green font regarding successful enrollment will display in the top left of the screen.

Add/Enroll Confirmation screen – Default Enrollment option

Voya PayCloud Home > Add/Enroll Confirmation

ABC INDUSTRIES - 551213

Participant (Bern Brandon) successfully enrolled on 10/16/2019 at 06:03:14. [Print](#)

Here are the details of the enrollment submitted on 10/16/2019 at 06:03:14:

Participant Name Bern Brandon	Participant Address 63 Wall Street Buffalo, NY 14223 USA	Social Security Number xxxxx 5787
Date of Birth 10/02/1983	Date of Hire 07/02/2019	Status 00-Active and Eligible
Salary 45000.00	Payroll Frequency Monthly	Federal Marital Status Single

Contribution Elections Source	Type	Amount
EE PRE TAX	%	10.00
ROTH	%	80.00

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	85.00

GOIA Default Investment No	Default Enrollment Yes
-------------------------------	---------------------------

This participant has been enrolled to the following fund based on the plan's default investment selection.

Fund Name:
Voya Solution 2050 Portfolio Srv

If there are any questions regarding this default enrollment investment selection, please contact your Plan Manager.

This is for default investment purposes only. This action will not invoke the auto-enroll process for the participant.

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Add/Enroll Confirmation screen – Default Enrollment option not performed

Voya PayCloud Home > Add/Enroll Confirmation

ABC INDUSTRIES - 551213

Participant (Test 4 Test Participant 4) successfully enrolled on 10/16/2019 at 07:24:59. [Print](#)

Here are the details of the enrollment submitted on 10/16/2019 at 07:24:59:

Participant Name Test 4 Test Participant 4	Participant Address 54 West Street Buffalo, NY 14223 USA	Social Security Number xxxxx 5787
Date of Birth 05/14/1980	Date of Hire 10/02/2019	Status 00-Active and Eligible
Payroll Frequency Monthly	Federal Marital Status Single	

Contribution Elections Source	Type	Amount
EE PRE TAX	%	10.00
ROTH	%	80.00

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	85.00

ODIA Default Investment No	Default Enrollment No
-------------------------------	--------------------------

Fund Name	Across ALL Sources
ABC_JC_31	50%
LongName36	50%

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Screen Options


- Click **Print** to print a copy of the confirmation screen
- Click **Go to Homepage** to go to the Home screen

Participant Update

Overview

The Participant Update function is used to view or change existing participant information. The fields will be pre-populated with current values on the recordkeeping system. Click Participant Update tile on the Home screen to go to the Participant Update screens. This option is not available for all plans.











Home screen


Voya PayCloud
Help | Exit

Voya PayCloud Home

551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

 Add/Enroll <small>Add/Enroll participant</small>	 Participant Update <small>View/Update participant information</small>	 Batch Participant Update <small>Update multiple participants</small>
 Contributions <small>Process contributions to accounts</small>	 Pending/Submitted Batches <small>Review batch information</small>	 Loan Repayment <small>Process loan repayments</small>
 Contributions/Loan Repayment <small>Process a file with contributions and/or loan repayment data</small>	 Bank Information <small>Add or update assigned bank</small>	 File Upload <small>Submit a file with contributions and/or loan repayment data</small>
 Transaction History <small>View all the files submitted</small>		

The Voya PayCloud will be available during these hours:
Monday through Friday from 7:00 AM - 7:30 PM EST
Saturday from 6:00 AM - 12:00 AM EST
Sunday from 12:00 PM - 7:00 AM Monday EST

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Participant Search Screen

You can search for participants either by SSN or Last Name. You can use the fuzzy search feature by entering the first three letters of the participant's name in the input box and click the **Search** button to view the search results on the next screen. For example, a participant search for 'Smi' will return the participant names 'Smith', 'Smiddey', 'Smithson' etc.

Participant Search



Note: Fuzzy searches do not work with SSN values. Participant SSNs must be a full nine numeric digits for the search to function

Screen Options

- Click **Search** to bring you to the Search Results Screen
- Click **Back** to return to the Home screen

Search Results Screen

Social Security Number	Participant Name
789-07-8900	T, I
347-64-2404	TE-OP, ST
123-43-2123	TEST, TEST
142-56-3452	TEST 3, FIRSTTEST 3
123-78-9456	TEST BADI, TEST RAGHAV
485-94-5849	TEST P1, P1
584-75-8475	TEST P2, P2
849-85-9456	TEST PARTICIPANT 2, TEST 2
545-48-5787	TEST PARTICIPANT 4, TEST 4
953-96-3963	TEST RA, RA R
998-87-7665	TEST TEST, DP

Search results can be sorted by clicking on the Social Security Number or Participant Name column headers. An upward orange arrow indicates sorting of the column in ascending order and a downward orange arrow indicates sorting of the column in descending order.

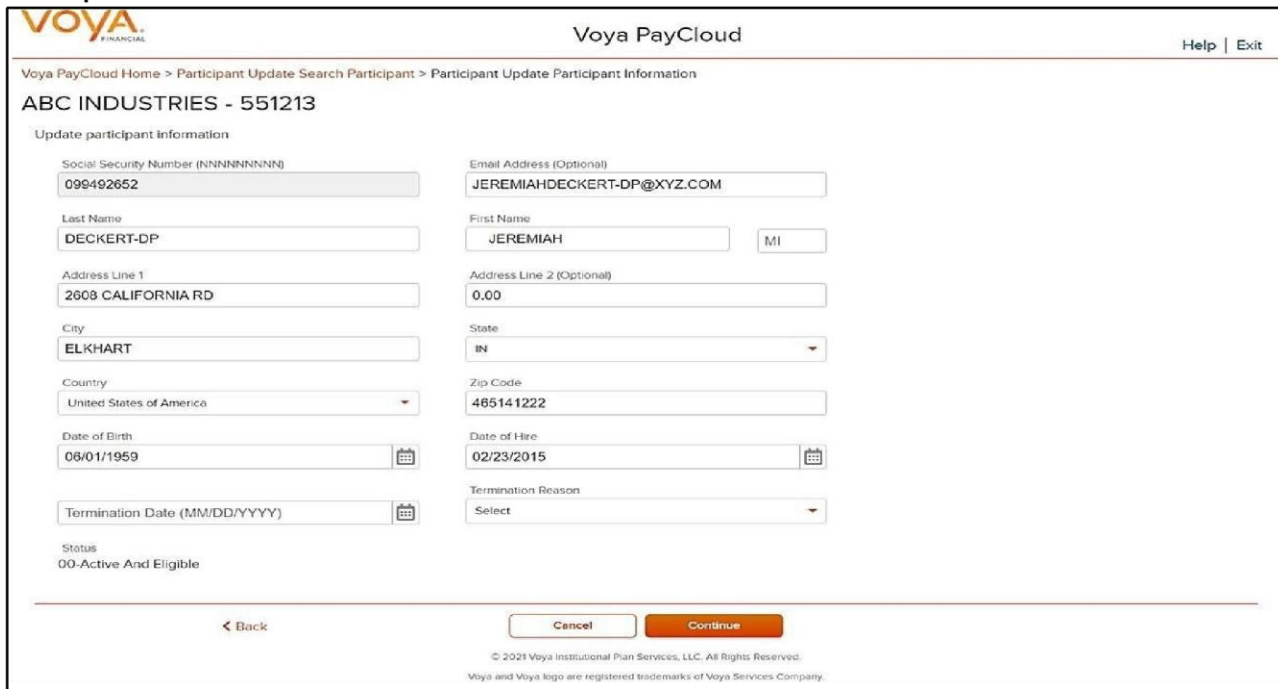
Screen Options

- Click **Back** to return to the Participant Search screen
- Select the Participant Name / SSN under the Search results to go to Participant Information screen

Participant Information Screen

All the information for the selected Participant will display on this screen. To update the data, simply overwrite the current field data.

Participant Information screen




Note: If the participant is eligible to participate in the plan, and not enrolled, they may be enrolled on this screen, if applicable for your plan.

Fields

In addition to the basic demographic fields entered at enrollment (such as name and address), this screen provides the opportunity to update the following fields:

Field	Description
Termination Date (if applicable)	The date of termination.

<p>Termination Reason</p>	<p>Reason for the termination:</p> <ul style="list-style-type: none"> • Retirement • Permanent Disability • Death • Voluntary Termination
<p>Do You Want to Make the Participant Active?</p>	<p>Checking this box allows you to define contribution and investment elections for the participant. The Plan Entry Date defaults to the current date. If the plan requires the participant to define their own contribution and investment elections, leave this box unchecked.</p>
<p>Has the Participant Elected the Morningstar Managed Account Program?</p>	<p>Morningstar election checkbox (if applicable for your plan).</p>
<p>Is this a QDIA Default Enrollment?</p>	<p>Displays if the plan offers QDIA enrollment for participants that are eligible but not participating. If the plan's QDIA is Managed Accounts, you must also select the Morningstar checkbox.</p> <p>You can click on the question icon for help text. The below information displays within a pop-up. "A Qualified Default Investment Alternative ("QDIA") is an investment alternative or option, as defined under rules issued by the Department of Labor, that has been chosen by the Plan's fiduciary in those instances when participants fail to provide direction or instruction how to invest monies in their retirement plan account.</p> <p>Check the QDIA default enrollment box to indicate that you are enrolling the employee into the plan's QDIA option. You will need to set up the investment election to the appropriate QDIA option as part of this enrollment transaction.</p> <p>Do not select the QDIA default enrollment box if the employee has submitted a signed enrollment form with any portion of the investment election that uses the QDIA fund. For example if the employee actively elects 100% to the plan's QDIA option, this is not considered a defaulted investment election.</p> <p>Contact Voya for further information."</p> <p>Note: This option is not available for all plans.</p>

<p>Is this a Default Enrollment?</p>	<p>Displays if the plan does not offer QDIA default enrollment. You can click on the question symbol for help text. The below information displays within a pop-up.</p> <p>Check the “Is this a Default Enrollment?” checkbox if you are performing a default enrollment to enroll the participant into the plan’s default investment option. You will need to set up and/or confirm the investment election to the appropriate fund based on the plan’s investment option as part of this enrollment transaction. Do not select the default enrollment box if the employee has submitted a signed enrollment form and has made a positive election.</p> <p>Contact Voya for further information</p>
--------------------------------------	--

Leave of Absence Entry Fields

This section may not be displayed, depending on your plan’s settings. These fields reflect Leaves of Absence, and include dates and reasons. They should only be used if a Leave of Absence is in effect for the participant.

Participant Update screen showing Leave of Absence fields

The screenshot shows the 'Update participant information' screen in Voya PayCloud. The page title is 'ABC INDUSTRIES - 551213'. The form is divided into two columns. The left column contains fields for Social Security Number (XXXXX4198), Last Name (RODRIGUZ-DP), Address Line 1 (961 WELLINGTON ST), City (MARIE, ONTARIO), Country (United States of America), Date of Birth (11/17/1982), Termination Date (05/28/2019), Absence Start Date, and Absence End Date. The right column contains fields for Email Address (Optional) (ANHRODRIGUZ-DP@XYZ.COM), First Name (ANH), MI, Address Line 2 (Optional), State (NJ), Zip Code (91758), Date of Hire (05/16/2014), Termination Reason (Voluntary Termination), Leave of Absence Start Reason (Select), and Leave of Absence End Reason (Select). At the bottom, there is a 'Status' field with the value '00-Active and Eligible'. Navigation buttons include '< Back', 'Cancel', and 'Continue'. Footer text includes '© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.' and 'Voya and Voya logo are registered trademarks of Voya Services Company.'

Fields

Field	Description
Leave of Absences Start Date	Start date of the leave. Use the calendar icon
Leave of Absence Start Reason	This field is required if a Start Date is entered. Select from: <ul style="list-style-type: none"> • FMLA • Military • Other
Leave of Absences End Date	The end date for a leave, if known. Use the calendar icon
Leave of Absences End Reason	This field is mandatory if a Leave of Absences End Date is entered. Select from: <ul style="list-style-type: none"> • Return to Active • Termination Status

Screen Options

- Click **Back** to return to the Participant Search Screen
- Click **Cancel** to go to the Home Screen
- Click **Continue** to go to Additional Information Screen

Error Messages

If there are any errors associated with the data you entered, Voya PayCloud will display an error message right below the field, instructing you to update the appropriate fields. Reject messages will occur if any required fields are not updated or, in the case of the ZIP code, do not validate properly against the entered state.

Example of a reject message: "Please enter a valid Zip Code."

Sample error message

Voya PayCloud Home > Participant Update Search Participant > Participant Update Participant Information

ABC INDUSTRIES - 551213

Update participant information

Social Security Number (NNNNNNNNN)
423093770

Last Name
ALMAN-DP

First Name
YICKY MI

Address Line 1
2213 B

Address Line 2 (Optional)

City
TULSA

State
OK

Country
United States of America

Zip Code
98899
Zip code is not valid for the state.

Date of Birth
11/19/1987

Date of Hire
10/09/2018

Termination Date
12/12/2018

Termination Reason
Voluntary Termination

Status
00-Active And Eligible

< Back Cancel Continue

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Additional Information Screen

This screen will vary according to plan settings, and may not appear.

Additional Information Screen

If any hour elements are accumulated, there two fields displayed. The "YTD" field is read-only (blue text) and comes from the current database value. The "Current" field directly above (in black text) may be edited with a new value. Entering a new value for the participant will change the value in the database. If the hour elements are overlaid (YTD values each time) then only one Hours field will be displayed. The entry from the Sponsor will overlay the value in the database each time.

Date Fields

Fields vary depending on plan settings and may not reflect all fields in the screen shown above. The **Division** drop- down has a selection "Other" that will display additional divisions not in the first drop-down or groups based on the first letter of the division name.

Field	Description
<p>Rehire Date</p>	<p>Rehire Date should be populated with the employee's most recent hire date. By populating this field (Rehire Date), employees in a terminated status code will be updated to an active status and all applicable termination information will be removed.</p> <p>Please advise the employee that they must establish their contribution rates and confirm their investment allocations in the plan on line in order to resume contributions to the savings plan.</p> <p>Voya does not use this field to calculate vesting. Depending on your plan's vesting method and service options you may be required to update additional information to correctly calculate the vested balances for the employee.</p> <p>Contact Voya for further information</p>

Alternate Vesting Date	Your employee's Alternate Vesting Date is a date you use to take into account service for vesting. If applicable, your employee's Alternate Vesting Date is the date that takes into account service prior to the rehire date.
-------------------------------	--

Field	Description
	For example, if your Employee's rehire date is January 1, 2007 and you need to take into account an additional one year of service prior to the rehire date, your employee's Alternate Vesting Date would be January 1, 2006.
Adjusted Date of Hire	<p>Your employee's Adjusted Date of Hire is a date you use to take into account service for vesting and eligibility. If applicable, your employee's Adjusted Date of Hire is the date that takes into account service prior to the rehire date.</p> <p>For example, if your Employee's rehire date is January 1, 2007 and you need to take into account an additional one year of service prior to the rehire date, your employee's Adjusted Date of Hire would be January 1, 2006."</p>

Screen Options

- Click **Back** to return to the Participant Information Screen
- Click **Cancel** to go to the Home Screen
- Click **Continue** to go to Participant Update Contribution Elections Screen

Participant Update Contribution Elections Screen

If your plan uses the Contribution Rate Change Service, this screen is where you may update deferral rates that Voya maintains for the participant account. Examples may include Employee Pretax or Roth (catchup options will display if the plan has requested to show this level of detail on the participant accounts) elections and the source for the catchup contributions.

Participant Update Contribution Elections screen

If the Morningstar program was selected on the first screen, the election percentages as defined by the plan will appear in place of the Investment Election source selections, as shown in the example below:

The participant has elected the Morningstar Managed Account Program. As defined by the Program, the participants Temporary Investment Election will be created as indicated below:

Fund Name	Percentage
Voya Fixed Account (4062)	100 %
Total	100%

To change the Morningstar Election for this participant, please go back to Enrollment Screen.

Fields

Field	Description
Amount or Percent	The mode of contributions to be used i.e. dollar amount or percent of the Contribution Elections.
Source	The source for the contribution elections.

Screen Options

- Click **Back** to go to Additional Information Screen
- Click **Cancel** to go the Home Screen
- Click **Continue** to go to Participant Update Investment Elections Screen

Participant Update Investment Elections Screen

This screen will vary according to plan settings, and may not appear. It allows you to update the investment elections by fund and amount for the participant.



Note: This screen is only available for updates if you have selected 'Make a Participant Active' on Participant Information Screen

Voya PayCloud

Help | Exit

Voya PayCloud Home > Participant Update Search Participant > Participant Update Participant Information > Additional Information > Contribution Elections > Investment Elections

ABC INDUSTRIES - 551213

Please see below your current investment Elections. To view the full investment name, hover over the Fund Name.

Search by:

Fund Name	Across ALL Sources
American Funds Nv Prspctv R3	0 %
ABC_IC_32	0 %
Long NAmE 33	0 %
Long NAmE 34	0 %
LongName36	0 %
Voya Solution 2035 Port Srv	0 %
Voya Solution 2045 Port Srv	0 %
Voya Solution Income Pt Srv	0 %
Nebraska Bond Debt Est Exp DC	0 %
Total	100 %

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Fields

Field	Description
Fund amounts	<p>Indicates a percent value in the row for the intended contribution fund. This value is a percentage of the total contribution. For example, if the participant selected an investment election of 15% of their salary and want that to be invested equally into four investment funds, "25" would appear at each fund.</p> <p>Continue until the Total field equals 100. These investments will be made across all sources of money</p>

Participant Update Investment Elections screen – No Default Enrollment

If you have chosen to perform a default enrollment for the participant on the Participant Information Screen, then based on the plan settings the Investment Elections screen will present the Default Investment Option for the plan that the participant has been enrolled into.

Participant Update Investment Elections screen – Default Enrollment

The screenshot shows the 'Voya PayCloud' interface. At the top, there is a breadcrumb trail: 'Voya PayCloud Home > Add/Enroll > Add/Enroll Participant Information > Additional Information > Contribution Elections > Investment Elections'. Below this, the participant information 'ABC INDUSTRIES - 551213' is displayed. A message states: 'This participant has been enrolled to the following fund based on the plan's default investment selection.' The 'Fund Name' is listed as 'Voya Solution 2050 Portfolio Srv'. A note at the bottom of the message area says: 'If there are any questions regarding this default enrollment investment selection, please contact your Plan Manager.' At the bottom of the screen, there are three buttons: a '< Back' button, a 'Cancel' button, and a 'Continue' button. The footer contains copyright information: '© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company. Click here for supported browsers.'



Note: The screen message will vary based on the plan offerings like QDIA default enrollment, plan's QDIA is Managed Accounts and plan is an AAME plan

Screen Options

- Click **Back** to go to the Participant Update Contribution Elections screen
- Click **Cancel** to go to the Home screen • Click **Continue** to go to the Participant Update Verify Information Screen


Error Messages

If the Contribution Elections Type and Catch-Up Contribution Elections Type do not match (both in dollar amount or percentage), the following error message appears: This participant currently has both \$ and % Catch-up election types on file. Contribution election types must match across all Catch-up sources. Please reach out to your Voya Payroll contact for assistance.

Participant Update Verify Information Screen

You can verify the updates made on the below screen before completing enrollment.

Participant Update Verify Information Screen – No Default Enrollment


Voya PayCloud
Help | Exit

Voya PayCloud Home > Participant Update Search Participant > Participant Update Participant Information > Additional Information > Contribution Elections > Investment Elections > Verify Information

ABC INDUSTRIES - 551213

Please verify the following information and press SUBMIT to complete the operation (you may need to scroll down to view the entire page).

Participant Name YICKY ALMAN-DP	Participant Address 2213 B TULSA, OK 73001 USA	Social Security Number 423093770
Date of Birth 11/19/1987	Date of Hire 10/09/2018	Status 00-Active And Eligible
Termination Date 12/12/2018	Termination Reason Voluntary Termination	
Termination Date 12/12/2018	E Mail Address test@gmail.com	


Contribution Elections Source	Type	Amount
EE PRE TAX	%	50.00
ROTH	%	20.00

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

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Participant Update Verify Information Screen – Default Enrollment


Voya PayCloud
Help | Exit

Voya PayCloud Home > Participant Update Search Participant > Participant Update Participant Information > Additional Information > Contribution Elections > Investment Elections > Verify Information

ABC INDUSTRIES - 551213

Please verify the following information and press SUBMIT to complete the operation (you may need to scroll down to view the entire page).

Participant Name YICKY ALMAN-DP	Participant Address 2213 B TULSA, OK 73001 USA	Social Security Number 423093770
Date of Birth 11/19/1987	Date of Hire 10/09/2018	Status 00-Active And Eligible
Termination Date 12/12/2018	Termination Reason Voluntary Termination	
Termination Date 12/12/2018	E Mail Address test@gmail.com	

Contribution Elections Source	Type	Amount
EE PRE TAX	%	50.00
ROTH	%	20.00

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

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Screen Options

- Click **Back** to go to the Participant Update Investment Elections Screen
- Click **Cancel** to go to the Home Screen
- Click **Edit** to go to the Participant Information screen
- Click **Submit** to save the changes and go to the Confirmation Screen with the ability to print the screen. A message in **green** font regarding successful participant update will display in the top left of the screen.

Participant Update Confirmation screen – No Default Enrollment

Voya PayCloud Home > Participant Update Confirmation

ABC INDUSTRIES - 551213

Participant successfully updated. Print

This participant update was submitted on 11/10/2021 at 06:03:58.

Participant Name YICKY ALMAN-DP	Participant Address 2213 B TULSA, OK 73001 USA	Social Security Number 423093770
Date of Birth 11/19/1987	Date of Hire 10/09/2018	Status 00-Active And Eligible
Termination Date 12/12/2018	Termination Reason Voluntary Termination	
Termination Date 12/12/2018	E Mail Address test@gmail.com	

Contribution Elections Source	Type	Amount
EE PRE TAX	%	50.00
ROTH	%	20.00

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

[Go To Homepage](#)

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Participant Update Confirmation screen – Default Enrollment

Voya PayCloud Home > Participant Update Confirmation

ABC INDUSTRIES - 551213

Participant successfully updated. Print

This participant update was submitted on 11/10/2021 at 06:03:58.

Participant Name YICKY ALMAN-DP	Participant Address 2213 B TULSA, OK 73001 USA	Social Security Number 423093770
Date of Birth 11/19/1987	Date of Hire 10/09/2018	Status 00-Active And Eligible
Termination Date 12/12/2018	Termination Reason Voluntary Termination	
Termination Date 12/12/2018	E Mail Address test@gmail.com	

Contribution Elections Source	Type	Amount
EE PRE TAX	%	50.00
ROTH	%	20.00

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

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Screen Options


- Click **Print** to print a copy of the confirmation screen • Click **Go to Homepage** to go to the Home screen

Batch Participant Update

Overview

As with other transactions in Voya PayCloud, you can either import a batch file of updates, or you can do it manually. Click Batch Participant Update tile on the Home screen to go to the Batch participant pages.











Home screen


Voya PayCloud
Help | Exit

Voya PayCloud Home

551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

 Add/Enroll Add/Enroll participant	 Participant Update View/Update participant information	 Batch Participant Update Update multiple participants
 Contributions Process contributions to accounts	 Pending/Submitted Batches Review batch information	 Loan Repayment Process loan repayments
 Contributions/Loan Repayment Process a file with contributions and/or loan repayment data	 Bank Information Add or update assigned bank	 File Upload Submit a file with contributions and/or loan repayment data
 Transaction History View all the files submitted		

The Voya PayCloud will be available during these hours:
 Monday through Friday from 7:00 AM - 7:30 PM EST
 Saturday from 6:00 AM - 12:00 AM EST
 Sunday from 12:00 PM - 7:00 AM Monday EST

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Batch Participant Import Screen

If the plan has Batch Participant File import activated, the first screen will be an option to import a file. If you select the 'Upload a File' radio button, you will be presented with a File Browse section where you may select the appropriate file to be imported. To use the Import File feature, you must use Internet Explorer version 7.0 or higher.

Batch Participant Update _ Import File screen

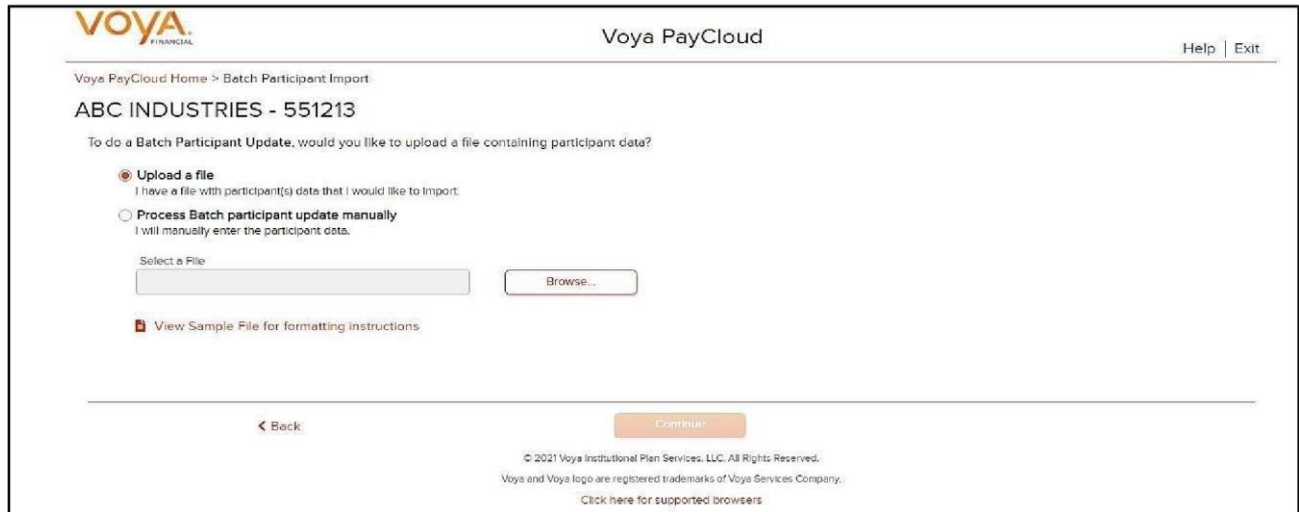
The screenshot shows the 'Batch Participant Update _ Import File' screen in the Voya PayCloud interface. At the top left is the VOYA FINANCIAL logo, and at the top right is the text 'Voya PayCloud' with 'Help | Exit' links. Below the header, the breadcrumb 'Voya PayCloud Home > Batch Participant Import' is visible. The main heading is 'ABC INDUSTRIES - 551213'. The question posed is 'To do a Batch Participant Update, would you like to upload a file containing participant data?'. There are two radio button options: 'Upload a file' (unselected) with the subtext 'I have a file with participant(s) data that I would like to import.', and 'Process Batch participant update manually' (selected) with the subtext 'I will manually enter the participant data.'. At the bottom, there is a '< Back' link and a 'Continue' button. Footer text includes '© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.', 'Voya and Voya logo are registered trademarks of Voya Services Company.', and 'Click here for supported browsers'.

Screen Options

- Select Process Batch participant update manually and click the **Continue** button to go to the Field Selection screen
- Select 'Upload a file' to select a file to import
- Select **Back** to return to the Home screen

If you select the 'Upload a file' radio button, you will be presented with a File Browse section where you may select the appropriate file to be imported.

Import File screen – Option ‘Upload a file’ selected



File Browse

For any file import, the file must follow the rules below. The file type must be one of the following formats:

- Excel spreadsheet (.xls, .xlsx and .xlsm)
- Comma delimited file (.csv)
- Plain text (.txt)
- .fix
- .dat
- .mdo
- .md5
- .pay
- .wk3
- .wk4
- .prn

General rules

- The imported file size must be greater than zero and less than 5MB.
- All SSNs must have nine digits; leading zeroes must be included.



Note: When you are in the process of creating a template, and attempt to change screens, you will be prompted to save the template.

Templates Screen

After you have selected **Next** from the File Browse screen, you will see the Select Template screen. From here you can:

- Select a template
- Add a new template
- Delete a template

A template contains the format you define for the import file, including column headings. After you select your file, you'll define which column contains SSN, First Name, Last Name, etc. A new template can be saved, so that you can reuse it or modify it to create another template for the next file import. When importing a file, verify that the template you selected contains the correct number of columns to accommodate the number of columns in the file so the imported file data formats correctly. You can add columns to an existing template or, if necessary, click **Create New Template** to create a new template that matches the format of the imported file.

Templates screen

The screenshot shows the 'Templates' screen in Voya PayCloud. At the top left is the VOYA FINANCIAL logo. The page title is 'Voya PayCloud' and there are 'Help | Exit' links at the top right. The breadcrumb trail reads 'Voya PayCloud Home > Batch Participant Import > Templates'. The main heading is 'ABC INDUSTRIES - 551213'. Below this, there is a paragraph of instructions: 'You can select an existing template or create a new one by selecting from the options below. If you use an existing template, please verify that any new columns added to your file have also been added to the selected template to ensure detail will import correctly.' A note states 'Please be advised that Division/Location column is required.' The interface features an 'Existing Template' dropdown menu with 'Select' as the current selection, a 'Go' button, a 'Delete' button, and a 'Create New Template' button. At the bottom left, there is a '< Back' button. The footer contains the text: '© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company. Click here for supported browsers'.

Screen Options

- Click **Browse** to select file to import
- Click **View Sample File for formatting instructions** to open a PDF file showing formatting rules
- Click **Back** to return to the Home screen
- Click Continue to go to the Templates screen

Screen Options

• Select an existing template from the list of saved templates using the drop down.

- o Click **Go** after selecting a template to go to the Existing Template screen
- o Click **Delete** to delete the selected template
- Click **Create New Template** to go to the Create Template screen
- Click **Back** to go to the Batch Participant Import screen

Create Template Screen

You will see this screen if you selected **Create New Template**. It is used to create a new template for an imported file. When creating a new template the following rules apply:

- New template name has a maximum of 15 characters for fixed width files and 20 characters for .csv and excel file formats.
- A maximum of 50 templates can be saved per plan.
- Optional data elements enabled for Enrollment will also be displayed. The override name for the optional data element will be displayed.
- A value of “Not Applicable” will also be displayed to exclude any columns from the imported file.
- The new template may require a “Division/Location” column (If authorized for the plan).
- At any time while you are creating a template, you can click the Save Template button to save your changes.

Create Template screen

Voya PayCloud Home > Batch Participant Import > Templates > Create Template

ABC INDUSTRIES - 551213

Create a new template

1 New Template Name

2 From top to bottom, how many rows would you like to remove. Headers: No Headers

3 From bottom to top, how many rows would you like to remove. Trainers: No Trainers

4 Now select each column title: Select an appropriate heading from the dropdown list for each column. To bypass a column, select Not Applicable.

	A	B	C	D	E	F
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
1	SSN	Last Name	First Name	ADDR 1	ADDR 2	City
2	415-40-9607	Lisa	Haydon	1113 B		Vatican
3	187-596-265	LN	Fn	12	1212	OK

[Back](#)
[Cancel](#)
[Save And Continue](#)
[Save Template](#)

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You must select a column heading for each column. See the sample images below that illustrate the Column Heading selections and the field definitions for more information.

Create column headings

Fields

Field	Description
New Template Name	Enter a name for the new template.
From top to bottom, how many rows would you like to remove?	<p>Select the number of header rows contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored to obtain the file data. They will still appear on this screen to help you select the column headings</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”</p>

<p>From bottom to top, how many rows would you like to remove?</p>	<p>Select the number of trailer rows contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p>
	<p>“Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”</p>
<p>Column Headings</p>	<p>Select a heading name for each column from the drop-down list. The list consists of the basic information such as name and Social Security number, the optional fields set as 'Required or Updateable' for the respective modules of the plan and an entry for each available source in the plan. To bypass a column, including name, select Not Applicable.</p>

Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Verification screen
- Click **Save Template** to save the template

Map Column Header Screen

If you import a file other than an Excel or .csv, you will see a screen to select columns to appear in your new template.

Map Column Header Screen – New Template

Voya PayCloud Home > Batch Participant Import > Templates > Test Template 3 Template

ABC INDUSTRIES - 551213

Existing Template:

2 From top to bottom, how many rows would you like to remove. Headers:

3 From bottom to top, how many rows would you like to remove. Trailers:

4 Now select each column title:

Add template fields

Field Type: Starting Position: Field Length:

Field Name	Starting Position	Field Length	
Social Security Number	1	9	Edit Delete

Uploaded Data

Social Security Number	Zip Code
696665555	0002
50752275	0002
254354354	0001
664773590	0001
362833664	0001
657696288	0001

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You can add template fields by selecting Field Type, Starting Position and Field Length. Click **Add Field** to add the field. The added fields will appear in the section below. You can either **Edit** or **Delete** an added field. Click **Update Data** to upload the data from the import file.

Existing Template Screen

If you select an existing template you will see the screen below. Existing templates can be modified and saved. Simply make any changes you need to make to any editable field, just as in the new template screen.

Existing Template screen

Voya PayCloud Home > Batch Participant Import > Templates > Test Template 10 Template

ABC INDUSTRIES - 551213

Existing Template
Test Template 10

From top to bottom, how many rows would you like to remove?
Headers: 1

From bottom to top, how many rows would you like to remove?
Trailers: No Trailers

Now select each column title:

This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E
	Social Security Number	Not Applicable	Not Applicable	Address Line1	Address Line2
1	SSN	ROLLOVER	EE PRETAX	ER PROFIT	Div/Loc
2	013-45-9998	20.00	4.00	17.00	1006
3	313-43-7023	15.00	2.00	18.00	1006
4	3215-46123	12	22	0.00	1006

< Back Cancel Save And Continue Save Template

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Fields

Field	Description
Existing Template	Template name.
From top to bottom, how many rows would you like to remove?	The number of headers can be selected. Upon clicking the question icon, the following text will display within a pop-up. “Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”
From bottom to top, how many rows would you like to remove?	The number of trailers can be selected. Upon clicking the question icon, the following text will display within a pop-up. “Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”

Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Batch Participant Update Audit Verify Information screen • Click **Save Template** to save template

Error Corrections

In case of errors upon clicking **Save and Continue**, the screen appears as below. Click **View Error Messages** to get a detailed view on the errors. A pop-up will display showing the error. All fields can be edited on this screen by manually clicking in the cell and typing the correct data.

Error Messages screen

Voya PayCloud

Voya PayCloud Home > Batch Participant Import > Templates > Test Template 10 Template

ABC INDUSTRIES - 551213

Template last saved on Wednesday, November 10th, 2021 06:33:41 AM

View Error Messages

Existing Template
1 Test Template 10

2 From top to bottom, how many rows would you like to remove.
Headers 1

3 From bottom to top, how many rows would you like to remove.
Trailers No Trailers

4 Now select each column title:
This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E
	Social Security Number	Not Applicable	Not Applicable	Address Line1	Address Line2
1	SSN	ROLLOVER	EE PRETAX	ER PROFIT	Div/Loc
2	013-45-9998	20.00	4.00	17.00	1006
3	313-43-7023	15.00	2.00	18.00	1006
4	321546123	12	22	0.00	1006

Back Cancel Save And Continue Save Template

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Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** after correcting errors to re-validate. Based on successful validation you will be taken to the Batch Participant Update Audit Verify Information screen • Click **Save Template** to save the template

Error Message Details

Errors
 Print

SSN	Name	Error
013-45-9998		Participant with SSN 013-45-9998 not found. If it is a new employee, add the participant by selecting the Add/Enrollment feature.
313-43-7023		Participant with SSN 313-43-7023 not found. If it is a new employee, add the participant by selecting the Add/Enrollment feature.
321546123		Participant with SSN 321546123 not found. If it is a new employee, add the participant by selecting the Add/Enrollment feature.

Done


Screen Options

- Click **Print** to print the errors
- Click **Done** to close the pop-up and return to the Create Template screen for correcting the errors

Batch Participant Update Audit Verify Information Screen

This is the final step in importing the file. No further changes will be allowed after this screen.

Verification screen


Voya PayCloud
Help | Exit

Voya PayCloud Home > Batch Participant Import > Templates > NewTIBPU Template > Verify Information

ABC INDUSTRIES - 551213

Please verify the following information
NOTE that the operation will not be completed until you click Submit.

Search by:

Select

Search

Q

Social Security Number	First Name	Last Name	State	Email Address	Zip Code	Date of Birth
849859458	TEST	TEST PARTICIPANT 2	NY	test@gmail.com	14223	07071987
430136261	GAYLORD	ARRELLANO-DP	WA	tdst2@gmail.com	980423006	09091985

By selecting "Submit", this information will be submitted with no further changes allowed. Select Back to return to the previous page.

← Back

Cancel


Submit

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Screen Options

- Click **Back** to go to the Create Template screen
- Click **Cancel** to go to the Home screen
- Click **Submit** to submit the participant data and go to the Batch Participant Confirmation screen. This may take a few seconds

Confirmation Screen



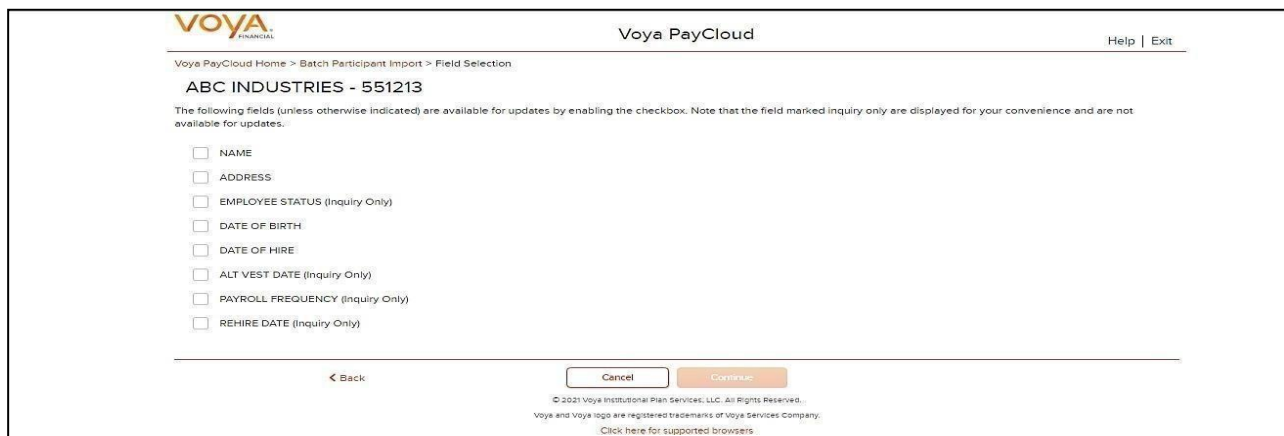
Screen Options

- Click **Print** to print the Confirmation screen •
- Click **Done** to return to the Home screen

Field Selection Screen

If you selected 'Process Batch participant update manually' on the Batch Participant Import screen, you will see a screen that allows you to select the columns that will appear on the Batch Participant Update screen. Select the fields for update by checking the box next to it. Some of the fields in the list will only be shown, not updated.

Field Selection Screen [Screen 1]



Screen Options

- Click **Back** to go to the Batch Participant Import /Home screen depending on the plan settings
- Click **Cancel** to go to the Home screen
- Click **Continue** to go to the Batch Participant Update Screen

Batch Participant Update Screen

The Batch Participant Update screen below allows you to update information for multiple participants in one step. It displays the participant information you selected on the previous screen. You can narrow the field of participants listed by using the Active Participants and Select Division/Location fields (see below). You can sort the participant information by clicking on the column headers. An upward orange arrow indicates sorting of the column in ascending order and a downward orange arrow indicates sorting of the column in descending order.

There are two ways to change existing information for participants:

- Select the appropriate fields on the previous screen, then simply change the information right in the fields on this screen
- Click the participant name to open the Participant Update screen for that participant. Make your changes and click **Continue**. The individual changes will be saved and the Batch Participant Update screen will appear again.

Once you have made all the desired changes, click the **Submit** button to save all changes in one batch and proceed to the Batch Participant Confirmation screen

Batch Participant Update screen

Voya PayCloud

Voya PayCloud Home > Batch Participant Import > Field Selection > Batch Participant Update

ABC INDUSTRIES - 551213

Select Division/Location
0001 HARDWOODS SPECIALTY PRODUCTS

Display Active Participants Only
 Display All

Done

Search by: Select Search

Name	SSN	First Name	Last Name	MI	Address Line1	Address Line2
LAST_NAME U, TESTING...	012686501	TESTING_U	LAST_NAME U	U	100 MAIN ST	100 MAIN ST1
BARNETT-DPIWE, HAMILT...	014480274	HAMILTON	BARNETT-DPIWE	QWE Q	801 JEFFERSON AVE#1	a2 UPDATE
HELDT-DP, RON QWE F	021674040	RON	HELDT-DP	QWE F	3305 S 500 E	0.00
GOTCHER-DP1, ROBBIE Q...	026655190	ROBBIE	GOTCHER-DP1	QWE F	501 NORCROSS LN	0.00
PARAS-DP, JUNIORQEWWE	027657203	JUNIORQEWWE	PARAS-DP		10950 ARROW RTE	0.00
BONELLI-DP, BUICK	028837868					

By clicking on a participant's name, you can link to the Participant Update section to view or update participant information.

Back Cancel Submit

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Fields

Field	Description
Select Division/Location	Changes divisions to display participants. Only divisions that you have prior access to will be selectable. Select the appropriate division (if applicable). Multiple divisions can be selected by clicking on the division name. Selected divisions are displayed with "X" icon. Click the "X" to deselect a division. Selected Divisions are displayed in bold in the dropdown and the user can deselect the same by clicking on the division name. This field is only displayed for plans that maintain different divisions or locations for their participants.
Select All Divisions	To select all divisions listed.
Display Active Participants Only	Select this option to display all active participants in the plan.
Display Active and Ineligible Participants	Select this option to display only active and ineligible participants in the plan. Clicking on the help icon will display the below text in a pop-up: "Select this option if you wish to include participants which are either in an active status or an ineligible status."
Display All Participants	Select this option to display all participants in the plan
Hide Terminated Participants	Uncheck this box to display the terminated participants in the plan. This box is checked by default and does not display the terminated participants
All other fields	You can edit any information in the lower part of the screen, except the Participant Name and SSN.

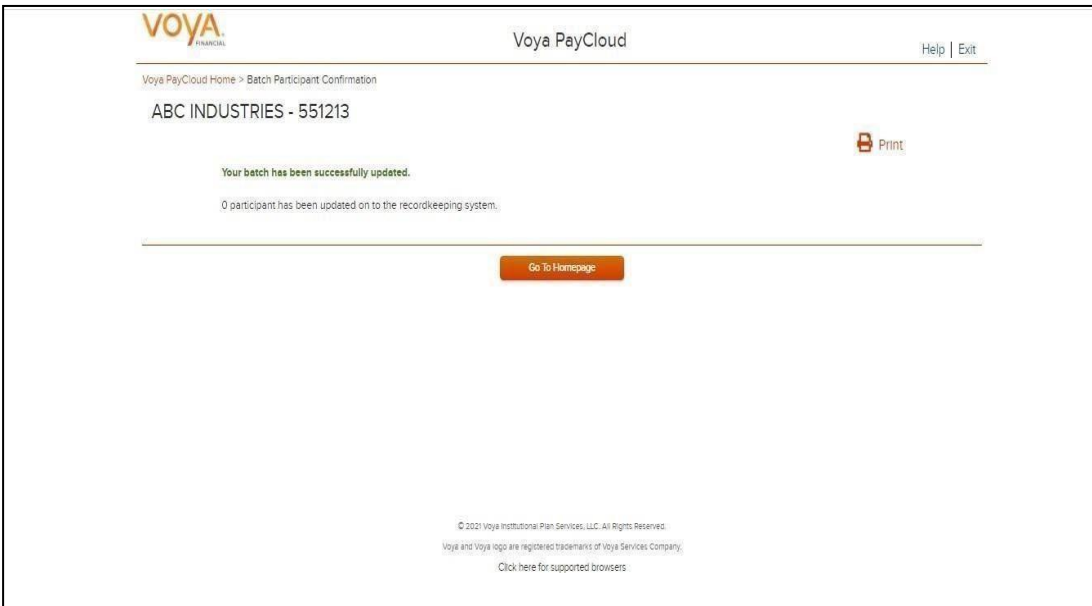


Note: Please make sure that all dates entered conform to the format MMDDYYYY with no slashes. If dates are entered incorrectly, an error message will appear after you click the **Submit** button and all dates must be corrected

Screen Options

- Click **Back** to go to the Field Selection screen
- Click **Cancel** to go to the Home screen
- Click **Submit** to save the changes and go to the Batch Participant Confirmation Screen with the ability to print the screen

Confirmation screen



Screen Options

- Click **Print** to print a copy of the Confirmation screen
- Click **Go to Homepage** to go to the Home screen

Contributions


Overview

The Contribution section allows you to enter payroll contributions. This section includes the functions:

- Importing a contribution file (if allowed for your plan type)
- Contribution set-up screen
- Entering payroll data

If the plan has Contributions File Import activated, the Contributions Set Up screen will provide an option to import a file. After successfully importing a file, it will be added to the Pending/Submitted Batches list, where you can make final edits before manual submission. Click Contribution tile on the Home screen to go to the Contributions pages.











Home screen


Voya PayCloud
Help | Exit

Voya PayCloud Home

551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

 Add/Enroll <small>Add/Enroll participant</small>	 Participant Update <small>View/Update participant information</small>	 Batch Participant Update <small>Update multiple participants</small>
 Contributions <small>Process contributions to accounts</small>	 Pending/Submitted Batches <small>Review batch information</small>	 Loan Repayment <small>Process loan repayments</small>
 Contributions/Loan Repayment <small>Process a file with contributions and/or loan repayment data</small>	 Bank Information <small>Add or update assigned bank</small>	 File Upload <small>Submit a file with contributions and/or loan repayment data</small>
 Transaction History <small>View all the files submitted</small>		

The Voya PayCloud will be available during these hours:
 Monday through Friday from 7:00 AM - 7:30 PM EST
 Saturday from 6:00 AM - 12:00 AM EST
 Sunday from 12:00 PM - 7:00 AM Monday EST

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Contributions Set Up Screen

The Contribution Set up screen allows you to enter the Contribution set up data – Batch Name, Payroll Date, Select Prefunded Account Contribution or Participant Account Contribution, Division fields, Copy Payroll Data from, Sources.

If you select the "Upload a File" radio button for Import a File, you will be presented with a File Browse section where you may select the appropriate file to be imported. If you want to make manual updates, select the "Process Contributions Manually" radio button and enter the Contribution set up data and click Continue to go to Contributions Payroll Input screen for batch processing.

 **Note:** File upload feature is not applicable for Prefunded Account Contribution

Contributions Set Up screen with 'Process Contributions Manually' Prefunded Account Contributions Selected


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contributions

ABC INDUSTRIES - 551213

To process contributions to accounts:

Please give this batch a name and enter a Payroll Date.

Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Prefunded Account Contribution [What's This?](#)
 Participant Account Contribution

The following sources are available to be included in your batch. Should you copy from an existing batch, the default sources will be populated based on the batch copied. If you need to add or delete sources from the batch, check or uncheck the sources as applicable.


Available Sources to Include in Batch

- EE PRE TAX
- ROTH ROLL
- ROLLOVER
- ROTH
- TAKEOVER
- SH MATCH

< Back
Continue

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Contributions Set Up screen with File Import activated & Participant Account Contributions Selected.


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contributions

ABC INDUSTRIES - 551213

To process contributions to accounts:

1 Please give this batch a name and enter a Payroll Date.

Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Prefunded Account Contribution [What's This?](#)
 Participant Account Contribution

Display Active Participants Only
 Display All

2 Would you like to upload a file containing participant data?

Upload a file
 I have a file with participant(s) data that I would like to import.

Process contributions manually
 I will manually enter the participant data.

Select a file:

< Back
Continue





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Contributions Set Up screen with 'Process contributions manually' option selected for Participant Account Contribution

**Field
s**

Field	Description
<p>Batch Name</p>	<p>Required field is used for memo purposes only. It allows you to enter a description for the payroll you are creating, so the description name is entirely your decision. For example, it may be helpful to differentiate between your hourly payroll and salary payroll.</p> <p>Click on “i” symbol next to the field. The following text will display: “The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas.”</p>

<p>Payroll Date</p>	<p>Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1.</p> <p>Note: Please use the correct plan year payroll date when remitting contributions. The payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.</p>
----------------------------	---

<p>Prefunded Account Contribution</p>	<p>Select this option to contribute to the Prefunded Account through the contribution batch</p> <p></p> <p>Note: This option will display depending on the plan settings</p> <p>Clicking on the 'What's this?' link will open the Prefunded Account Guide in a new window</p>
<p>Participant Account Contribution</p>	<p>Select this option to contribute to the Participant Account through the contribution batch</p>
<p>Display Active Participants Only</p>	<p>Select this option to include only active participants in the contribution batch. This is selected by default</p> <p></p> <p>Note: This option is available for selection only for Participant Account Contribution</p>
<p>Display Active and Ineligible Participants Only</p>	<p>Select this option to include participants which are either in an active status or ineligible status in the contribution batch</p> <p>Clicking on the help icon will display the below text in a pop-up: "Select this option if you wish to include participants which are either in an active status or an ineligible status."</p> <p> Note: This option is available for selection (depending on plan settings) only for Participant Account Contribution</p>
<p>Display All Participants</p>	<p>Select this option to include all participants in the contribution batch</p> <p></p> <p>Note: This option is available for selection only for Participant Account Contribution</p>
<p>Select All Division/Location</p>	<p>Check this box to select all the divisions/locations in the plan for the batch (may not appear, depending on plan settings).</p>


<p>Select Division/Location</p>	<p>Changes divisions to display participants. Only divisions that you have prior access to will be selectable. Select the appropriate division (if applicable). Multiple divisions can be selected by clicking on the division name. Selected divisions are displayed with “X” icon. Click the “X” to deselect a division. Selected Divisions are displayed in bold in the dropdown and the user can deselect the same by clicking on the division name. This field is only displayed for plans that maintain different divisions or locations for their participants.</p>
<p>Display Participants with Contributions</p>	<p>Filters for only the active plan participants that have made contributions (optional). This does not include active participants that have not contributed.</p> <p> Note: If you select the option to display participant with contribution, you must also select a batch to copy from. This option is applicable only for Participant Account Contribution</p>
<p>Copy Payroll Data From</p>	<p>This field contains a drop-down list of previously submitted payroll files (may not appear, depending on plan settings). You can choose to create a new payroll and copy the financial data from your last payroll. This may be helpful if your payroll does not contain many changes. This data can include hours, (which can be accumulated provided your plan is set up for this function).</p> <p> Note: Previously submitted payroll files are sorted by pay date, with the most recent batch displayed first. This option is applicable only for Participant Account Contribution</p>
<p>Source Selection</p>	<p>Checked sources will appear on the following batch screen. If you have chosen to copy payroll data from a previously submitted payroll file, the default sources will be prepopulated based on the file copied. You can add or delete sources (check or uncheck) as applicable.</p>




Screen Options

- Click **Back** to return to the Home screen
- Select Process contributions manually for Import a File and click **Continue** to go to the Contributions Payroll Input screen

Contributions Set Up screen with ‘Upload a File’ option selected for File Import

Fields

Field	Description
Batch Name	<p>Required field is used for memo purposes only. It allows you to enter a description for the payroll you are creating, so the description name is entirely your decision. For example, it may be helpful to differentiate between your hourly payroll and salary payroll.</p> <p>Click on question icon next to the field. The following text will display</p> <p>“The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas.”</p>
Payroll Date	<p>Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1.</p> <p> Note: Please use the correct plan year payroll date when remitting contributions. The payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.</p>

<p>Participant Account Contribution</p>	<p>Select this option to contribute to the Participant Account through the contribution batch</p>
<p>Display Active Participants Only</p>	<p>Select this option to include only active participants in the contribution batch. By default this will be selected</p> <p> Note: This option is available for selection only when Participant Account Contribution is chosen</p>
<p>Display Active and Ineligible Participants Only</p>	<p>Select this option to include participants which are either in an active status or ineligible status in the contribution batch</p> <p>Clicking on the help icon will display the below text in a pop-up: “Select this option if you wish to include participants which are either in an active status or an ineligible status.”</p> <p> Note: This option is available for selection (depending on plan settings) only when Participant Account Contribution is chosen</p>
<p>Display All Participants</p>	<p>Select this option to include all participants in the contribution batch</p> <p> Note: This option is available for selection only when Participant Account Contribution is chosen</p>

Screen Options

- Click **Browse** to select a Contributions file to import
- Click **View Sample File for formatting instructions** to open a PDF file showing formatting rules
- Click **Back** to return to the Home screen
- Click **Continue** to go to the Templates Screen

File Browse

1. For any file import, the file must follow the rules below. The file type must be one of the following formats:

- Excel spreadsheet (.xls, .xlsx and .xlsm)
- Comma delimited file (.csv)
- Plain text (.txt)
- .fix
- .dat
- .mdo

- .md5
 - .pay
 - .wk3
 - .wk4
 - .prn
2. The imported file size must be greater than zero and less than 5MB.
 3. All SSNs must have nine digits; leading zeroes must be included.
 4. Negative amounts can be accepted. Please contact your administrator for more information on adding this function.



Note: When you are in the process of creating a template, and attempt to change screens, you will be prompted to save the template.

Templates Screen

After you have selected **Continue** from the File Browse screen, you will see the Templates screen. From here you can:

- Select a template
- Add a new template
- Delete a template

A template holds the format you define for the import file, including column headings. After you select your file, you'll define which column contains SSN, Contribution Amount, Employer Match, etc. The template can be saved, so that you can reuse it or modify it to create another template next time.

Templates screen

Screen Options

- Select an existing template from the list of saved templates using the drop down.
 - o Click **Go** after selecting a template to go to the Existing Template screen
 - o Click **Delete** to delete the selected template
- Click **Create New Template** to go to the Create Template screen • Click **Back** to go to the Contributions Set Up screen

Create Template Screen

You'll see this screen if you selected **Create New Template**. It is used to create a new template for an imported file. When creating a new template. The following rules apply:

- New template name has a maximum of 15 characters for fixed width files and 20 characters for .csv and excel file formats.
- A maximum of 50 templates can be saved per plan.
- Optional data elements enabled for Contributions will also be displayed. The override name for the optional data element will be displayed.
- A value of "Not Applicable" will also be displayed to exclude any columns from the imported file.
- The new template may require a "Division/Location" column (If authorized for the plan).
- At any time while you are creating a template, you can click the **Save Template** button to save your changes.

Create a Template screen

The screenshot shows the 'Create a Template' screen in Voya PayCloud. The page title is 'Voya PayCloud' and the breadcrumb is 'Voya PayCloud Home > Contributions > Templates > Create Template'. The plan name is 'ABC INDUSTRIES - 551213'. The form includes:

- 1. 'New Template Name' input field.
- 2. 'From top to bottom, how many rows would you like to remove.' dropdown menu.
- 3. 'From bottom to top, how many rows would you like to remove.' dropdown menu.
- 'Headers' dropdown menu set to 'No Headers'.
- 'Trailers' dropdown menu set to 'No Trailers'.
- Check this box if dollar amounts in file do not have decimal points.
- 4. 'Now select each column title:' section with a table for column selection.

	A	B	C	D	E
	Column 1	Column 2	Column 3	Column 4	Column 5
1	SSN	ROLLOVER	EE PRETAX	ER PROFIT	DIV/LOC
2	013-45-9998	20.00	4.00	17.00	1006
3	313-43-7023	15.00	2.00	18.00	1006
4	321546123	12	22	0.00	1006

At the bottom of the form, there are buttons: '< Back', 'Cancel', 'Save And Continue', and 'Save Template'. A footer contains copyright information: '© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company. Click here for supported browsers.'

Fields

Field	Description
-------	-------------

New Template Name	Enter a name for the new template.
From top to bottom, how many rows would you like to remove?	<p>Select the number of header rows contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored to obtain the file data. They will still appear on this screen to help you select the column headings</p> <p>Upon clicking the question icon, the following text will display within a popup.</p> <p>“Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”</p>
From bottom to top, how many rows would you like to remove?	<p>Select the number of trailer rows contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.</p> <p>Upon clicking the question icon, the following text will display within a popup.</p> <p>“Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”</p>
Check Box if Dollar Amounts Have an Implied Decimal	Check this box if the imported file has implicit decimals. If your file has decimals, leave this box unchecked.
Column Headings	Select a heading name for each column from the drop-down list. The list consists of the basic information such as name and Social Security number, the optional fields set as 'Required or Updateable' for the respective modules of the plan and an entry for each available source in the plan. To bypass a column, including name, select Not Applicable .

Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors you will be taken to the Contributions Payroll Input screen
- Click **Save Template** to save the template

Map Column Header Screen

If you import a file other than an Excel or .csv, you will see a screen to select columns to appear in your new template.

Map Column Header Screen – New Template

Voya PayCloud Home > Contributors > Templates > New template Template

ABC INDUSTRIES - 551213

Create new template

1 Existing Template
New Template

2 From top to bottom, how many rows would you like to remove.
3 From bottom to top, how many rows would you like to remove.

Headers: No Headers
Trailers: No Trailers

Check this box if dollar amounts in file do not have decimal points

4 Now select each column title:

Add template fields:

Field Type: Select Starting Position: Field Length: ADD FIELD

Field Name	Starting Position	Field Length	
Social Security Number	5	9	Edit Delete
ROTH/ROLL	18	2	Edit Delete

Update Data

Uploaded Data

Social Security Number	EE PRE TAX	ROTH/ROLL
9184 100	2	5
92091 100	2	6
91684 100	2	7
91232 100	2	9

Back Cancel Save AND Continue Save Template

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You can add template fields by selecting Field Type, Starting Position and Field Length. Click **Add Field** to add the field. The added fields will appear in the section below. You can either **Edit** or **Delete** an added field. Click **Update Data** to upload the data from the import file.

Map column header screen - Existing Template

Voya PayCloud Home > Contributions > Templates > New template Template

ABC INDUSTRIES - 551213

Existing Template:

2 From top to bottom, how many rows would you like to remove. Headers: 3 From bottom to top, how many rows would you like to remove. Trailers:

Check this box if dollar amounts in file do not have decimal points

4 Now select each column title:

Add template fields:

Field Type: Starting Position: Field Length: Add Field

Update Date:

Uploaded Data:

Social Security Number	EE PRE TAX	ROTH ROLL
91594 100	2	5
92091 100	2	6
91804 100	2	7
91233 100	2	8

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Existing Template Screen

If you select an existing template you will see the screen below. Existing templates can be modified and saved. Simply make any changes you need to make to any editable field, just as in the new template screen.

Existing Template Screen

Voya PayCloud Home > Contributions > Templates > ConfTest Template

ABC INDUSTRIES - 551213

Existing Template:

2 From top to bottom, how many rows would you like to remove. Headers: 3 From bottom to top, how many rows would you like to remove. Trailers:

Check this box if dollar amounts in file do not have decimal points

4 Now select each column title:

This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E
	Social Security Number	ROLLOVER	EE PRE TAX	Not Applicable	Column 5
1	SSN	ROLLOVER	EE PRETAX	EE PROFIT	Div Loc
2	013-45-6998	20.00	4.00	17.00	1006
3	315-43-7023	15.00	2.00	19.00	1006
4	3215-60123	12	22	0.00	1006

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Fields

Field	Description
Existing Template	Template name.
From top to bottom, how many rows would you like to remove?	The number of headers can be selected. Upon clicking the question icon, the following text will display within a pop-up. "Select the number of headers contained in the import file. Options include "No Headers" (default), and the values 1-9. When the file is imported, these header fields will be ignored."
From bottom to top, how many rows would you like to remove?	The number of trailers can be selected. Upon clicking the question icon, the following text will display within a pop-up. "Select the number of trailers contained in the import file. Options include "No Trailers" (default), and the values 1-9. When the file is imported, these trailer fields will be ignored."

Screen Options

- Click **Back** to go to the Select a Template screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Contributions Payroll Input screen • Click **Save Template** to save the template

Error Corrections

In case of errors upon clicking **Save and Continue**, the screen appears as below. Click **View Error Messages** to get a detailed view on the errors. A pop-up will display showing the error. All fields can be edited on this screen by manually clicking in the cell and typing the correct data.

Error Messages screen

VOYA FINANCIAL

Voya PayCloud

Voya PayCloud Home > Contributions > Templates > ContTest Template

ABC INDUSTRIES - 551213

Template last saved on Wednesday, November 10th, 2021 09:11:58 AM

View Error Messages

Existing Template: ContTest

1 From top to bottom, how many rows would you like to remove: 1

2 From bottom to top, how many rows would you like to remove: No Trailers

Check this box if dollar amounts in file do not have decimal points

4 Now select each column title:

This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E
	Social Security Number	ROLLOVER	EE PRE TAX	Not Applicable	Not Applicable
1	SSN	ROLLOVER	EE PRE TAX	ER PROFIT	Div/Loc
2	013-45-9998	20.00	4.00	1700	1006
3	313-43-7023	15.00	2.00	19.00	1006
4	321546123	12	22	0.00	1006

Back Cancel Save And Continue Save Template

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Screen Options

- Click **Back** to go to the Select a Template screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** after correcting errors to re-validate. Based on successful validation, you will be taken to the Contributions Payroll Input screen
- Click **Save Template** to save template

Error Message Details

Errors Print

SSN	Error
321546123	ROLLOVER is limited to two decimal places
321546123	EE PRE TAX is limited to two decimal places

Done

Screen Options

- Click **Print** to print the errors
- Click **Done** to close the pop-up and return to the Create Template screen for correcting the errors

Contributions Payroll Input Screen

The Contribution Payroll Input screen allows you to enter or update contributions for the prefunded account or the participants in the plan based on your selection to perform a contribution towards the prefunded account or participant account on the Contribution Set Up screen.

For prefunded account contribution, only the prefunded account will be displayed and you may enter or update the contributions accordingly. For participant account contribution, you may select and copy data from a previously submitted payroll and make changes based on current information, or you may generate a payroll using new information. The participants are sorted in alphabetical order by default. You can sort the participants by clicking on any of the column headers. An upward orange arrow indicates sorting of the column in ascending order and a downward orange arrow indicates sorting of the column in descending order. A **Catch-Up** option, if available, will display and allow the user to designate catch-up contributions. A batch can include both catch-up and non-catchup contributions.

If you have contributions for a newly eligible participant, you will need to create a new enrollment by selecting **New Enrollment** at the bottom of the screen. Once the enrollment is completed, you may continue entering payroll data on the Contribution screen.



Note: Only plans offering New Enrollment functionality will see the **New Enrollment** button at the bottom of the screen.

Contributions Payroll Input screen – Prefunded Account Contribution

Contributions Payroll Input screen – Participant Account Contribution

Voya PayCloud Home > Contributions > Payroll

ABC INDUSTRIES - 551213

Your batch is ready for processing. Please be advised, the order of the source columns may have changed. Enter data into the appropriate columns.

Batch Name: Payroll Date:

Search by:

Name	SSN	Status	At Vest Date	Payroll Frequency	EE PRE TAX	ROTH ROLL	ROLLOVER	RO
BACKER-DP, FRANKLYN	879787628	01-Active; Awaiting Suspension		1	0.00	0.00	0.00	
BADIGERI, RAGHAV	123123124	30-Term & Awaiting Payment	05/17/2019	1	0.00	0.00	0.00	
BANDA-DP, EFRENE	485462760	10-Susp From Ee Cntrbs Only		1	0.00	0.00	0.00	
BANUELOS-DP, DAMIAN	635423801	01-Active; Awaiting Suspension		1	0.00	0.00	0.00	
BARNETT-DPIWE, HAMILTON ...	014480274	00-Active And Eligible		1	0.00	0.00	0.00	
BARON-DP, ORLANDO	410502238	01-Active; Awaiting Suspension		1	0.00	0.00	0.00	
BAUMANN-DP, AVER	935663591	00-Active And Eligible			0.00	0.00	0.00	
BELAIR-DP, EVERETT	421613352	00-Active And Eligible			0.00	0.00	0.00	
BENCE-DP, BRANDON	828196250	00-Active And Eligible		1	0.00	0.00	0.00	
BLACKER-DP, SHAUN	126893350	00-Active And Eligible			0.00	0.00	0.00	
BONELLI-DP, BUCK	028837868	00-Active And Eligible			0.00	0.00	0.00	
Total					0.00	0.00	0.00	0.00

By clicking on a participant's name, you can link to the Participant Update section to view or update participant information.

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Fields

Prefunded Account Contribution

Based on your plan settings, Division/Location values are selectable and you can select a different Division/Location for funding purposes. Only positive amount contributions are accepted for the prefunded account.

Participant Account Contribution

Some columns will have drop-down selection lists (these will differ based on your plan settings and permissions). Many of these values can be changed on this screen. If Division/Location values are selectable, each participant must have a value and used for contribution funding.

By clicking on a participant's name, you can link to the Participant Update section to view or update participant information. After finishing the updates to the participants, you will be returned to the Contributions Payroll Input screen. See *Participant Update* section for more details.

The Termination Date and Termination Reason Code may be updated as part of the batch file. The updates will be sent to the recordkeeping system at the time the batch is submitted and the confirmation is received

Multiple Division Plans

Sometimes multiple division plans that have restricted user access may have the need to remit a contribution for an employee that they are not the primary employer of within a plan. If a plan is authorized for multiple divisions, a separate column will be displayed in the table. By selecting a division/location, you are temporarily changing the bank account from which the funding for this Contribution will be deducted. The division/location will not be updated on the participant record through the Contribution batch. To permanently change a participant's division/location, use the *Participant Update* screen.

Contributions Payroll Input Screen with Multiple Division Plan

Voya PayCloud

Voya PayCloud Home > Contributions > Payroll

ABC INDUSTRIES - 551213

Your batch is ready for processing. Please be advised, the order of the source columns may have changed. Enter data into the appropriate columns.

Batch Name: B5 Payroll Date: 10/01/2021

By selecting a division/location, you are temporarily changing the bank account from which the funding for this Contribution is coming from. This division/location will not be updated on the participant record through the Contribution batch. To permanently change a participant's division/location, use Participant Update.

Please note: If you are required to update participant Current Period Hours with your contributions, the Hours will only update on Voya's recordkeeping system after the batch has been fully submitted and finished.

Search by: Select Search

Name	SSN	Period Comp	Division/Location	Mos Svc	Number Of Hours	Number Of Hours	Elig Hrs Annu	Total
4	xxxxx9807	0.00	1001	1	0.00	0.00	0.00	1,629.00
AKEY-DP, TEST 2	xxxxx9843	0.00	1001	14	0.00	0.00	0.00	1,539.00
ANGUANO-DP, TRINA	xxxxx5379	0.00	1005	4	0.00	0.00	0.00	1,629.00
ANGUS-DP, KATIA	xxxxx7780	0.00	1005	2	0.00	0.00	0.00	1,629.00
ANSELMO-DP, AMBROSE	xxxxx9476	0.00	1005	4	0.00	0.00	0.00	1,629.00
ARCHAMBAULT-DP, CLEMENT...	xxxxx7859	0.00	1005	1	0.00	0.00	0.00	1,629.00
ARDON-DP, CHI	xxxxx5799	0.00	1005	1	0.00	0.00	0.00	1,131.00
BARCO-DP, HOPE	xxxxx5926	0.00	1005	5	0.00	0.00	0.00	1,578.00
BARKSDALE-DP, KYONG	xxxxx2315	0.00	1005	8	0.00	0.00	0.00	1,629.00
BEETS-DP, PAULINE	xxxxx5582	0.00	1005	1	0.00	0.00	0.00	1,629.00
BESLEY-DP, GINO	xxxxx2896							
Total								

By clicking on a participant's name, you can link to the Participant Update section to view or update participant information.

Add Participants from Alternate Location New Enrollment

Back Cancel Save And Continue

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Screen Options

- Click **Add Participants from Alternate Location** opens a new screen to Add Participant from another Division/Location to a contribution file, or delete participants from the batch
- Click **New Enrollment** to go to the Add/Enroll Participant screen
- Click **Cancel** to go to the Home Screen
- Click **Back** to go to the Contributions Set Up screen
- Click **Save and Continue** to go to the Pending Batches screen. The Pending Batches screen will display a success message

Add Participants from Alternate Location screen

The Add Participants from Alternate Location screen allows you to add participants from another division or location to a contribution file, or delete participants from the batch. This is only available for some plans that

use multiple locations. Participants from different divisions can be added to a pending batch. You can view the participants that have previously been added.

Add Participants from Alternate Location

Voya PayCloud Home > Contributions > Payroll > Add Participant to Batch

ABC INDUSTRIES - 551213

Only participants within your authorized division/location will display in the batch. If you need to submit contributions for a participant that has transferred to another unauthorized division/location, transferred to your authorized division/location, or is actively employed in multiple divisions/locations, you may add them here by using the search feature below.

If you had previously added a participant to your batch, they will be displayed below and you may delete them at any time.

To add a participant, locate them via the search tool below and click 'Add'.

- Select the Div Sub to apply funding to.

Select Division/Location to Apply Funding to SSN

0001 HARDWOODS SPECIALTY PRODUCTS

If the participant has transferred to your division/location and the division/location has not yet been updated, please contact the current division/location:

Division/Location : 9999

If the participant is actively employed in multiple divisions/locations and the primary division/location should be changed to your authorized division/location, please contact your relationship manager.
- Search By

Search By SSN
- Search Participant by SSN

Search

Social Security Number	Participant Name	
123-45-6799	TEST, TEST ASD T	Add
999-99-0002	TAKEOVER 2	Add
999-99-0003	TAKEOVER 3	Add
999-99-0004	TAKEOVER 4, FN 4	Add

Added Participants			
TEST, TEST ASD	123456799	0001	Remove
TAKEOVER, 3	999990003	0001	Remove

DONE

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Select a Div/Sub to apply the funding to.

To add a participant to the selected batch:

- Select a 'Search By' criteria
- Enter the corresponding value in the field and click Search
- From the Search results, select Add to add the participant(s)

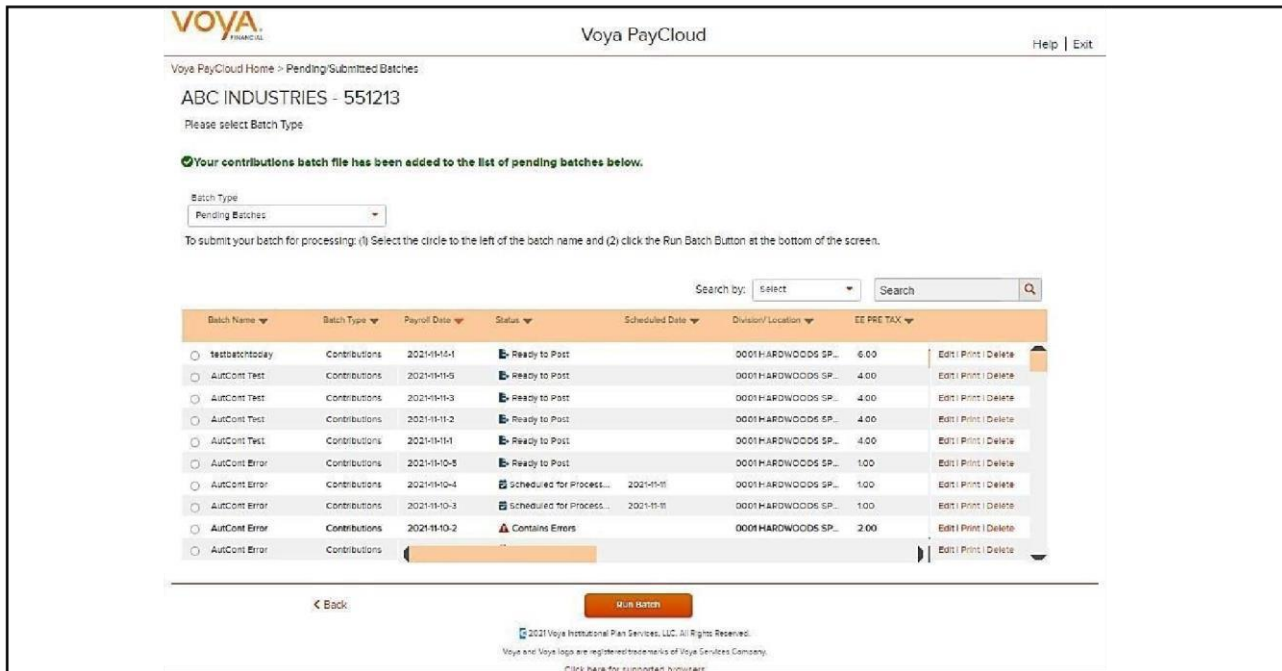
To delete a previously added participant:

- From the Added Participants, select Remove to delete the participant(s)

Screen Options

- Click **Done** to add the selected participants to the batch and go to the Contributions Payroll Input screen

Pending or Submitted Batches screen – Success message



When importing a Contribution File:

- The Contribution Input screen will also display the message “Your file has been successfully imported.”
- If the “Display Active Participants Only” box is unchecked, all participants not included in the imported file but found in the recordkeeping system will be displayed.
- Select **Continue** to advance to the Pending/Submitted Batches screen.
- By selecting a division/location, you are temporarily changing the bank account from which the funding for this Contribution will be deducted. The division/location will not be updated on the participant record through the Contribution batch. To permanently change a participant’s division/location, use the Participant Update screen.

Pending/Submitted Batches

Overview

All batch files for Contribution and Loan activity can be viewed with this feature. Pending batch files may be edited from this screen if they are not submitted. These batches include:

- Saved batches
- Batches scheduled for submission at a later date


- Batches with errors

Submitted batch files cannot be edited. Voya PayCloud allows you to enter payroll data and, if desired, pend the submission of the data for a later date.

Click **Pending/Submitted Batches** to display the Pending/Submitted Batches screen. The default display is of Pending Batches (a list of all files created but not submitted), of payroll types (Contributions, Loans and Combined).

Use the Batch Type pull-down to select **Submitted Batches** which will display submitted and deleted batches. Displayed batches are sorted in descending order of payroll date, then by payroll type.











Home screen


Voya PayCloud
Help | Exit

Voya PayCloud Home

551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

 Add/Enroll Add/Enroll participant	 Participant Update View/Update participant information	 Batch Participant Update Update multiple participants
 Contributions Process contributions to accounts	 Pending/Submitted Batches Review batch information	 Loan Repayment Process loan repayments
 Contributions/Loan Repayment Process a file with contributions and/or loan repayment data	 Bank Information Add or update assigned bank	 File Upload Submit a file with contributions and/or loan repayment data
 Transaction History View all the files submitted		

The Voya PayCloud will be available during these hours:
 Monday through Friday from 7:00 AM - 7:30 PM EST
 Saturday from 6:00 AM - 12:00 AM EST
 Sunday from 12:00 PM - 7:00 AM Monday EST

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Pending / Submitted Batches Screen

Pending Batches is the default option for this screen and displays the following batch detail information. This information may vary depending upon the selected plan.

Pending Batches or Submitted Batches screen

Voya PayCloud Home - Pending/Submitted Batches

ABC INDUSTRIES - 551213

Please select Batch Type

Batch Type
Pending Batches

To submit your batch for processing: (1) Select the circle to the left of the batch name and (2) click the Run Batch Button at the bottom of the screen.

Search by: Select Search

Batch Name	Batch Type	Payroll Date	Status	Scheduled Date	Division/Location	EE PRE TAX
<input type="checkbox"/> testbatchtoday	Contributions	2021-11-14-1	Ready to Post		0001 HARDWOODS SP...	8.00
<input type="checkbox"/> AutCont Test	Contributions	2021-11-15	Ready to Post		0001 HARDWOODS SP...	4.00
<input type="checkbox"/> AutCont Test	Contributions	2021-11-13	Ready to Post		0001 HARDWOODS SP...	4.00
<input type="checkbox"/> AutCont Test	Contributions	2021-11-14-2	Ready to Post		0001 HARDWOODS SP...	4.00
<input type="checkbox"/> AutCont Test	Contributions	2021-11-14-1	Ready to Post		0001 HARDWOODS SP...	4.00
<input type="checkbox"/> AutCont Error	Contributions	2021-11-10-5	Ready to Post		0001 HARDWOODS SP...	1.00
<input type="checkbox"/> AutCont Error	Contributions	2021-11-10-4	Scheduled for Process...	2021-11-11	0001 HARDWOODS SP...	1.00
<input type="checkbox"/> AutCont Error	Contributions	2021-11-10-3	Scheduled for Process...	2021-11-11	0001 HARDWOODS SP...	1.00
<input type="checkbox"/> AutCont Error	Contributions	2021-11-10-2	Contains Errors		0001 HARDWOODS SP...	2.00
<input type="checkbox"/> AutCont Error	Contributions					

Back Run Batch

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Future postings can still be edited. Uploaded batch contributions and loans have an “Open” status until submitted on this screen. If there were errors during your batch submission, then the Batch Status displays as ‘Contains Errors’. An error message appears stating “Your payroll batch was not submitted successfully. Please contact Voya immediately prior to re-submitting the batch.” Attempts to resubmit the batch without contacting Voya may result in duplicate transactions

Below actions can be performed on a Pending batch. Select the batch and click:

- **Edit** to go to Contributions or Loan Repayment or Combined File Processing depending on the data type being processed.
- **Print** to print a copy of your batch file. This will open a window containing report sort options. See *Pending/Submitted Batches Print Screen* for more details
- **Delete** to delete a pending batch
- **Run Batch** to go to the Funding Details screen

Fields

Field	Description
Search By	Search Options: <ul style="list-style-type: none"> • Batch Name • Batch Type • Payroll Date • Status • Schedule Date • Division/Location • Contribution Total • Loan Total
Search	Ability to enter the search value for the selected Search Option
Batch name	Your name for the batch. Non-editable
Batch type	<ul style="list-style-type: none"> • Contributions • Loans • Combined
Payroll date	Date you entered for the batch. This format is YYYYMM-DD <Sequence Number>. The sequence number is assigned automatically by the system.
Status	Pending batches: <ul style="list-style-type: none"> • Open • Contains errors • Ready to Post • Scheduled Submitted batches all have status: "Submitted."
Scheduled Date	Will display only for batches scheduled
Division/Location	Will display only for multiple division plans. Display values : Multiple divisions or Specific division code
Contribution Total	Total batch contribution
Loan Total	Total loan

Screen Options

- Click **Back** to go to Home Screen
- Click **Run Batch** to go to Funding Details Screen

Pending Batches Funding Details Screen (Remittance Screen)

This screen allows you to review batch information and select remittance method (if allowed for your plan).

Pending Batches Funding Details screen

Voya PayCloud Home > Pending/Submitted Batches > Funding

ABC INDUSTRIES - 551213

Please be advised that sufficient funds must be in your bank account before you submit funding. Please ensure all information is correct and select FINISH to process. (You may need to scroll down to view the entire page.)

Batch Name testbatchtoday	Plan Number 551213	Plan Name ABC INDUSTRIES
Payroll Date 11/14/2021	Payroll Sequence Number 1	User ID kran11993d46b0
Total Contribution 41.00	Total Loan Repayments 0.00	Total Funding Required for ACH EFT 41.00

Method Of Remitting Fund

ACH Debit

Bank Name
JPMC

Account Number
789789789M

ABA Number
123456789

Plan Will Initiate Funding

Submit Date

Submit Now

Schedule Date

Please note that the Available Forfeiture and Prefunded Account Balances that are shown by money source are as of the prior close of the NYSE.

Account Name	Money Source Type	Available Account Balance	Enter Offset Amount
Forfeiture	ROTH ROLL	\$9,947.69	\$0.00
Forfeiture	ROLLOVER	\$9,773.29	\$0.00
Forfeiture	EE PRE TAX	\$4,769.95	\$0.00
Forfeiture	ROTH	\$9,876.79	\$0.00

Batches submitted successfully on weekends and market holidays, or after 4:00pm ET (or earlier, should the market close for trading prior to 4:00pm ET) on any business day, will not be processed until the following business day.

To avoid duplicate transactions please do not click Finish more than one time. You may use the Pending/Submitted Batches option to review your submissions.

[Back](#) [Finish](#)

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Forfeitures

If forfeiture funds are set up for your plan, you will see your forfeiture balance by fund source on this screen. Forfeitures represent any nonvested amount that a participant forfeits due to a termination. The forfeiture amount will be deducted from a predetermined fund. You may edit individual participant amounts to offset forfeitures by clicking in an individual cell for that fund. Total amounts will display at the top of the fund column.

If prefunded account offsetting is set up for your plan, you will see the prefunded account balance by fund source on this screen. Prefunded account holds the prefunded employer match or profit sharing assets that will be allocated to the participants at a future date. The prefunded amount will be deducted from a predetermined fund. Prefunded account can be used to offset the given payroll and Loan Repayments.

Fields

Field	Description
ACH Debit	This will be the default if allowed by the plan. Banking information is displayed below for reference.
Plan will initiate Funding	Select this for all other methods for this batch
Submit Now	Batches submitted before 4:00 pm EST will post for the current trade date. Batches after 4:00 pm EST will post on the next business date
Schedule Date	Select the ACH Debit method to be able to schedule a date in the future (no more than 15 calendar days in advance, and on a business day). The month, day and year are entered in MM-DD-YYYY format
Forfeiture and Prefunded Account Balance	The Forfeiture and Prefunded Account Balance section will display depending on the plan settings
Payroll Calendar	The Payroll Calendar section will display depending on the plan settings. Select the Payroll Calendar for receiving email notifications on payroll file due dates pertaining to the Contribution batch or Contributions/Loan Repayments Batch from the list based on the plan settings. One or many or no calendars can be selected for a batch. Note : This is not applicable for Loan Repayment batch files

Forfeiture and Prefunded Account Balance Fund Table

If forfeiture offsetting is set up for your plan, you will see your forfeiture balance by fund source on this screen. Forfeitures represent any non-vested amount that a participant forfeits due to a termination. The forfeiture amount will be deducted from a predetermined fund. Forfeitures are used to offset the given payroll.

If prefunded account offsetting is set up for your plan, you will see the prefunded account balance by fund source on this screen. Prefunded account holds the prefunded employer match or profit sharing assets that will be allocated to the participants at a future date. The prefunded amount will be deducted from a predetermined fund. Prefunded account can be used to offset the given payroll and Loan Repayments.

There will be an area where you may specify and enter the amount of the offset you wish to use from each of the sources

If the plan does not have multiple Divisions/Locations:

- A single table will be displayed with one row per fund and money source
- Each table row will display the available balance for the fund and money source and a column for each account source which is available to enter be used as an offset amount

If the plan has multiple Divisions/Locations:

- There will be two tables, one with balance information and another for data entry.
- The first table will show the available balance by fund and money source.
- The second table will display rows with show the batch totals by Division/Location and a column to enter the offset amounts from for each available money source.

Entering the Offset Amount:

- You may input a positive offset amount up to the available balance being displayed for each fund and money source
- The total of all offset amounts cannot exceed the total available amount for the money source in the fund nor the batch total.
- The offset amount will be deducted from the ACH/EFT amount due for the batch

Screen Options

- Click **Back** to go to the Pending Batches or Submitted Batches screen
- Click **Finish** to submit the batch for processing

Pending Batches Submission pop-ups

When the batch is submitted you will see a pop – up regarding the submission. The following will be displayed for a batch which was submitted as ACH Debit / Submit Now.

Batch Funding

Batches submitted successfully on weekends and market holidays, or after 4:00pm ET (or earlier, should the market close for trading prior to 4:00pm ET) on any business day, will not be processed until the following business day.

Do you wish to continue ?

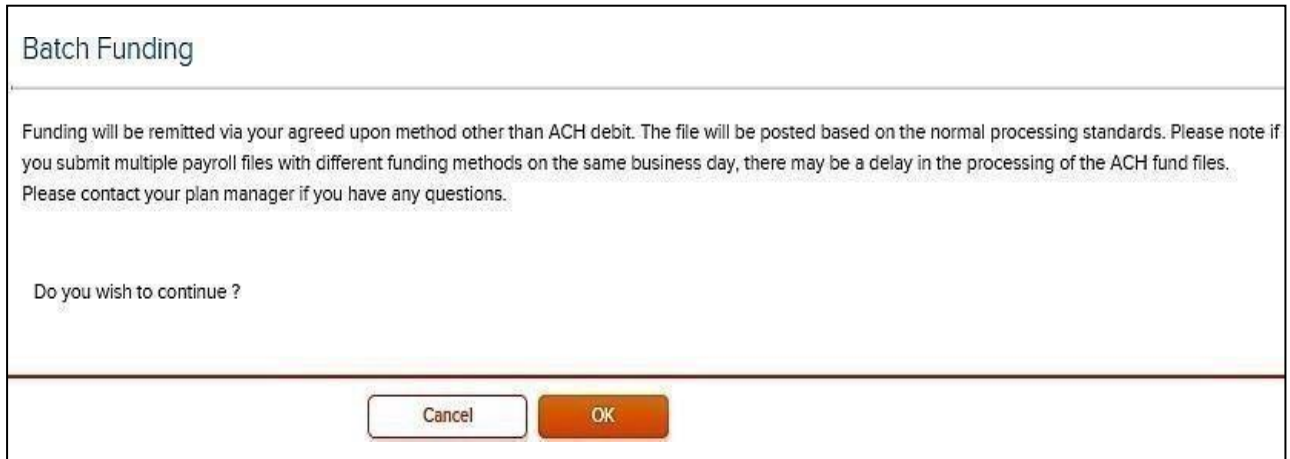
The following will be displayed for a batch which was submitted as ACH Debit / Scheduled Date (when the batch was scheduled to be processed on a future date).

Batch Funding

You have scheduled a file to post on a future date. When batches are scheduled for a future processing date, the authorized debit amount will be requested to be withdrawn from your account on the date entered. Investments will take place at the close of the stock market on that same date, provided that the Ready to Post status of the individual employees accounts remain in good order. Changes to the batch may be completed on-line until 7:00pm ET the day PRIOR to the scheduled transaction date. Any changes made to this batch will disable the scheduled date and require a new date to be entered.

Do you wish to continue ?

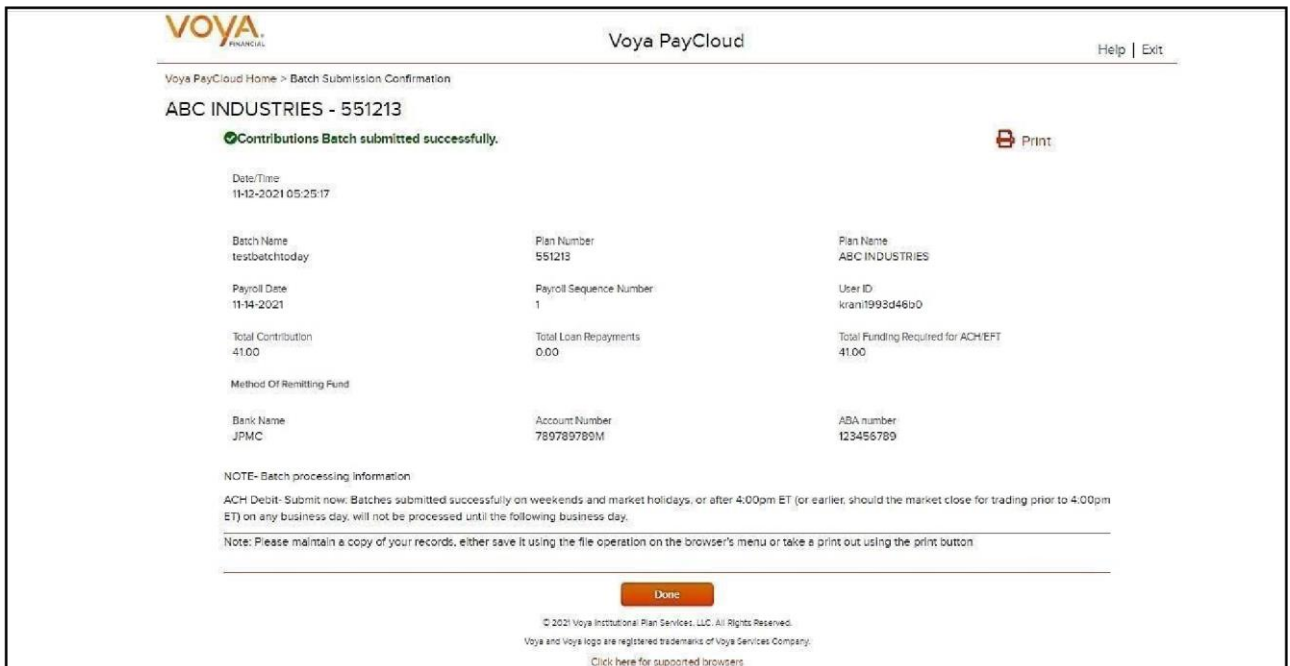
The following will be displayed for a batch which was submitted as "Plan will initiate funding"



Pop-up Screen Options

- Click **Cancel** to stay on the Funding Details screen
- Click **OK** to submit the batch and go to the Funding Details Confirmation screen with the ability to print the screen.

Funding Details Confirmation screen



Screen Options

- Click **Go to Homepage** to go to Home Screen
- Click **Print** to print a copy of the Confirmation screen


Pending Batches Edits

Pending batches can be edited. If the payroll has errors, the status will read: "Contains Errors." All errors must be corrected before the file can be submitted for funding.

Batch Name ▼	Batch Type ▼	Payroll Date ▼	Status ▼	Scheduled Date ▼	Division/ Location ▼	EE PRE TAX ▼	
<input type="radio"/> AutCont Error	Contributions	2021-11-10-2	⚠ Contains Errors		0001 HARDWOODS SP...	2.00	Edit Print Delete ▲
<input type="radio"/> AutCont Error	Contributions	2021-11-10-1	📄 Ready to Post		0001 HARDWOODS SP...	1.00	Edit Print Delete

To view and correct the errors, select the batch and click **Edit**. The respective screen displays based on the Batch Type.

Contribution Screen


Voya PayCloud
Help | Exit

Voya PayCloud Home > Pending/Submitted Batches > Payroll

ABC INDUSTRIES - 551213

Your batch is ready for processing. Please be advised, the order of the source columns may have changed. Enter data into the appropriate columns.

Batch Name

Payroll Date

View Error Messages

Search by:

Name ▼	SSN ▼	Status ▼	Alt Vest Date ▼	Payroll Frequency ▼	EE PRE TAX ▼	ROTH ROLL ▼	ROLLOVER ▼	ROT
., PARTICIPANT	39082xxxx	30-Term & Awaiting Payment		5	1.00	0.00	0.00	
12LN, FN	12512xxxx	04-Eligible, Not Participate		1	0.00	0.00	0.00	
54, FM	85648xxxx	01-Active; Awaits Suspension	03/31/2019	1	0.00	0.00	0.00	
ARRELLANO-DP, GAYLORD	43013xxxx	30-Term & Awaiting Payment		1	0.00	0.00	0.00	
ASDDSA, SADASD	31212xxxx	04-Eligible, Not Participate		1	0.00	0.00	0.00	
ASF, ASFA	73837xxxx	00-Active And Eligible			1.00	0.00	0.00	
AVENDANO-DP, JAMEY M	34653xxxx	30-Term & Awaiting Payment	04/09/2019	1	0.00	0.00	0.00	
AYCOCK-DP, THERON-SANDY...	70468xxxx	01-Active; Awaits Suspension		1	0.00	0.00	0.00	
BACKER-DP, FRANKLYN	87978xxxx	01-Active; Awaits Suspension		1	0.00	0.00	0.00	
BADIGERI, RAGHAV	12312xxxx	30-Term & Awaiting Payment	05/17/2019	1	0.00	0.00	0.00	
BANDA-DP, EFRENe	48546xxxx							
Total					2.00	0.00	0.00	0.0

By clicking on a participant's name, you can link to the Participant Update section to view or update participant information.

← Back

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Screen Options

- Click **View Error Messages** to see the associated errors. See Error Messages screen below.
- Click Add **Participants from Alternate Location** to go to a new screen to Add Participant from another Division/Location to a batch file, or delete participants from the batch.
- Click **New Enrollment** to go to the Add/Enroll Participant screen.
- Click **Back** to go to the Pending Batches or Submitted Batches screen
- Click **Save and Continue** after making the corrections to go to the Pending or Submitted Batches screen.
- Click Cancel to go to the Home Screen.

Scheduled Pending Batch Edits


If you edit a scheduled pending batch, Voya PayCloud removes the Schedule Date for submission that was previously entered. Complete the following to ensure that the edited batch has a scheduled date for submission:

- At the prompt, click **OK** to continue with the batch edit or click Cancel to keep the batch as originally scheduled.
- If you click **OK** to edit the batch, check the Batch Status description in the Pending Batch List after you complete the edit. If the batch does not have a status Scheduled, click **Run Batch** and re-enter the Schedule Date on the Funding Details screen to receive another confirmation
- Verify the Batch status again to confirm that the batch status is Scheduled

For Pending Loan Batches Only

Select a value in the drop-down marked “Multiply EXPECTED AMOUNT and populate PAYMENT AMOUNT by” to multiply the payment values by that factor. For example, if “2” is selected, then all payment amounts are multiplied by two.

Error messages screen

Errors  Print

Batch: Loan Payroll Date: 2018-01-01

Batch Name: Test Batch1 Payroll Seq: 2

Error messages are displayed in red while warning messages are displayed in blue.

SSN	Name	Error
04416xxxx	TERRAZAS-DP, STEVEN	LN00004E - Loan number specified on transaction not found or inactive
11560xxxx	BERGERSON-DP, ERICKA	LN00084E - Sum of LF int paid > LH tot int paid

Done

Screen Options

- Click **Print** to print a copy of the errors
- Click **Done** to return to the Loan Repayments screen to correct the errors

Error Correction

All errors must be corrected before a batch can be submitted. Click **View Error Messages** button at the top of the screen. Find the problems and correct them manually by clicking in the cell and typing correct data.

If the batch does not have any errors, you will see a “Ready to Post” message. Select the Batch and click **Run Batch** to proceed to the Funding Details screen.

Data will be electronically scanned as it’s imported. For example, these error messages could appear and require correction:

- Participant Ineligible for Contribution
- Allocations not equal to 100%

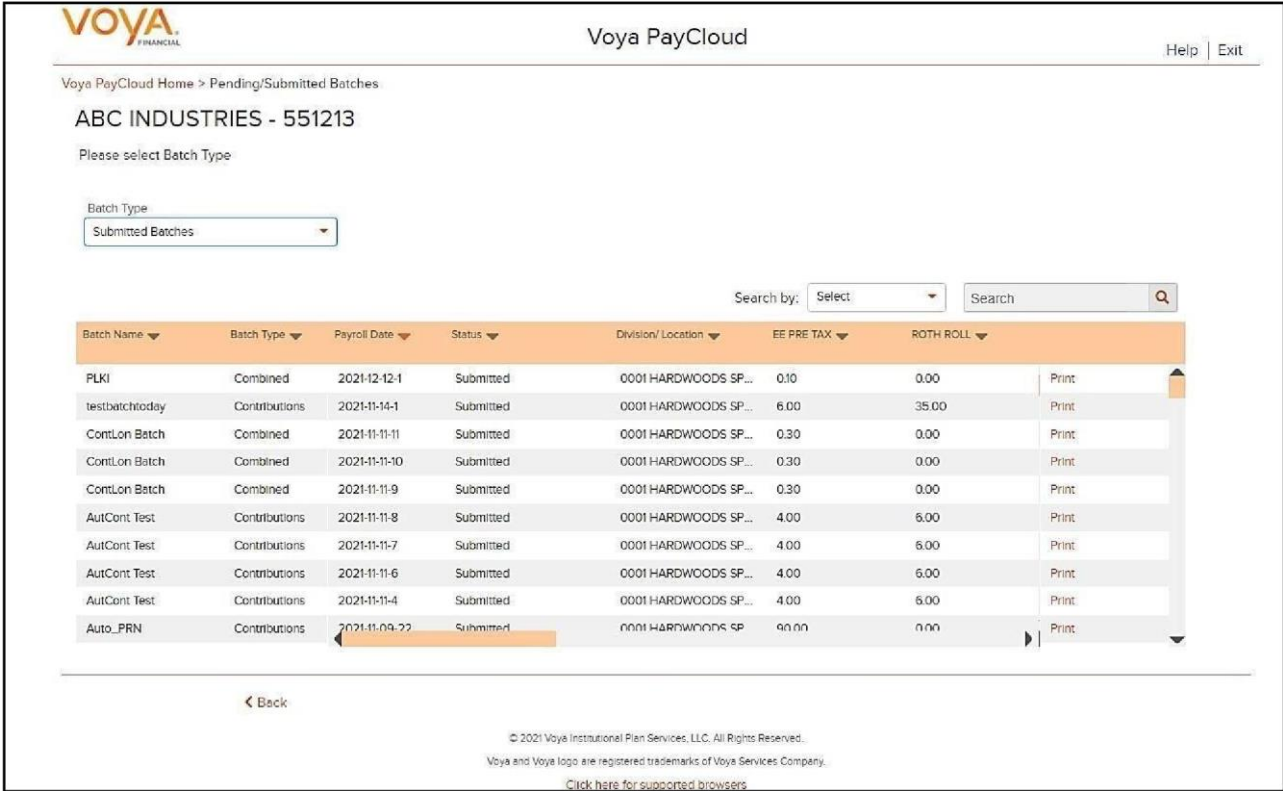


Note: Before the data is accepted, all reject messages must be resolved and warning messages acknowledged by selecting **Edit** in the Pending Batches screen.

Submitted Batches

From the Batch Type drop-down, select Submitted Batches to display your previously submitted batches. Note that the submitted batches have no options to edit, delete, or Run Batch. These options are only available for pending batches.

Submitted Batches screen



You can select the batch and click **Print** to print a copy of your batch file. This will open a window containing report sort options. See *Pending/Submitted Batches Print Screen* for more details

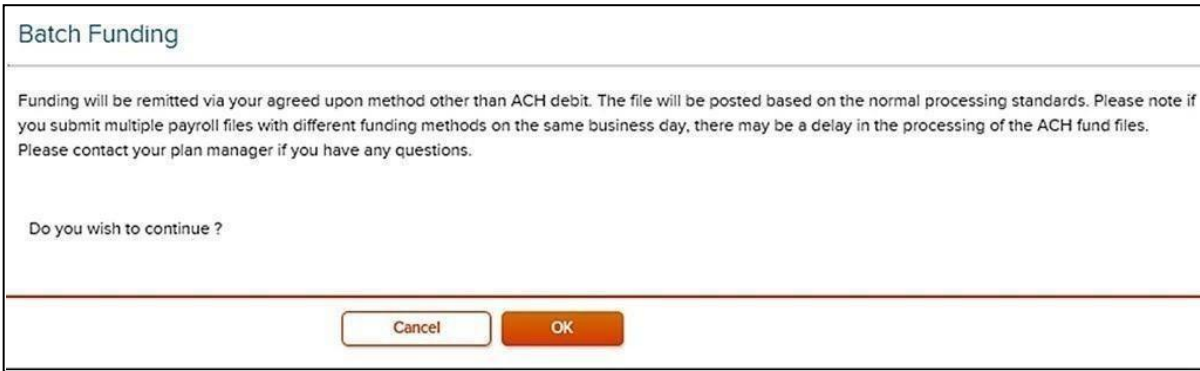
Screen Options

- Click **Back** to go to the Home screen

Pending / Submitted Batches Print Screen


This feature will print out a detailed, participant-level version of the batch. The program will ask you to select a sort type for this report:

Sort Options screen



Click the **OK** button to proceed to the batch participant report. Submitted batches are saved for 18 months.

Batch Report screen


Voya PayCloud
Help | Exit

Voya PayCloud Home > Pending/Submitted Batches > Pending/Submitted Batches Print

Batch: Combined
Batch Name: PLKI
Submit Date/Time: 09-20-2021 12:00:00
Plan Number: 551213
Division/Location: SINGLE

Payroll Date: 12-12-2021
Payroll Seq: 1
Status: Submitted
Submitting User ID:


SSN	Name	Contribution Type	Loan no	Amount
73837xxxx	ASF, ASFA	EE PRE TAX		\$0.10
		ROTH		\$0.10
				EE PRE TAX Total: \$0.10
				ROTH Total: \$0.10
				Contributions Total: \$0.20
				Loan Repayment Total: \$0.00
				Batch Total: \$0.20
				PreFunded Account Offset: \$0.20
				Funding Method: ACH/Debit

Account Name	Money Source Type	Offset Amount (Contribution Total)	Offset Amount (Loan Total)
Prefunded	EE PRE TAX	\$0.10	\$0.00
Prefunded	ROTH	\$0.10	\$0.00

NOTE: Batch processing information

Batches submitted successfully on weekends and market holidays, or after 4:00pm ET (or earlier, should the market close for trading prior to 4:00pm ET) on any business day, will not be processed until the following business day.

You have chosen to offset your ACH debit with employer funds. Please be advised that the available balance of employer accounts are subject to change and market fluctuation. The available balance could also be reduced by multiple batches submitted on the same day. This may require Voya to request additional funds from you to complete the transaction.

< Back
 Print

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Screen Options

- Click **Print** to print the screen
- Click **Back** to go to the Pending Batches or Submitted Batches screen

Loan Repayments

Overview

This feature allows the user to enter loan repayments at a participant level. After successfully importing a file, it will be added to the Pending/Submitted Batches list, where you can make final edits before manual submission. Click Loan Repayment tile on the Home screen to go to the Loan Repayment pages.

Note: Plans not offering participant loans will not have this section.

Home screen

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Voya PayCloud

Voya PayCloud Home

551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

 Add/Enroll Add/Enroll participant	 Participant Update View/Update participant information	 Batch Participant Update Update multiple participants
 Contributions Process contributions to accounts	 Pending/Submitted Batches Review batch information	 Loan Repayment Process loan repayments
 Contributions/Loan Repayment Process a file with contributions and/or loan repayment data	 Bank Information Add or update assigned bank	 File Upload Submit a file with contributions and/or loan repayment data
 Transaction History View all the files submitted		

The Voya PayCloud will be available during these hours:
Monday through Friday from 7:00 AM - 7:30 PM EST
Saturday from 6:00 AM - 12:00 AM EST
Sunday from 12:00 PM - 7:00 AM Monday EST

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If the plan has Loan Repayments File Import activated, the Loan Repayments screen will provide an option to import a file. If you select the 'Yes' radio button for Import a File, you will be presented with a File Browse section where you may select the appropriate file to be imported.

Loan Repayments screen with File Import activated and Option 'Process loan repayment manually' option selected

File Import

Screen Options

- Click **Back** to go to the Home screen
- Click **Continue** to go to the Loan Input screen or Participants Screen depending on the plan settings

Loan Repayments screen with 'Upload a File' option selected for File Import

Voya PayCloud Home > Loan Repayment

ABC INDUSTRIES - 551213

To process a loan repayment:

1 Please give this batch a name and enter a Payroll Date.
Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Batch Name: Payroll Date:

Display Active Loans Only

2 Would you like to upload a file containing participant data?

Upload a file
 I have a file with participant(s) data that I would like to import.

Process loan repayment manually
 I will manually enter the participant data.

Select a File:

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Screen Options

- Click **Browse** to select a Loan Repayment file to import
- Click **View Sample File for formatting instructions** to open a PDF file showing formatting rules
- Click **Back** to return to the Home screen
- Click **Continue** to go to the Templates Screen

File Browse

For any file import, the file must follow the rules below. The file type must be one of the following formats:

- Excel spreadsheet (.xls, .xlsx and .xlsm)
- Comma delimited file (.csv)
- Plain text (.txt)
- .fix
- .dat
- .mdo
- .md5
- .pay
- .wk3
- .wk4
- .prn


General rules

- The imported file size must be greater than zero and less than 5MB.
- All SSNs must have nine digits; leading zeroes must be included.



Note: When you are in the process of creating a template, and attempt to change screens, you will be prompted to save the template.

Fields

Field	Description
Batch Name	<p>Required field is used for memo purposes only. It allows you to enter a description for the payroll you are creating, so the description name is entirely your decision. For example, it may be helpful to differentiate between your hourly payroll and salary payroll.</p> <p>Click on question icon next to the field. The following text will display</p> <p>“The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas.”</p>
Payroll Date	<p>Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1.</p> <p> Note: Please use the correct plan year payroll date when remitting contributions. The payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.</p>
Select All Division/Location	<p>Click this box to select all the locations for the batch (if applicable).</p>
Select Division/Location	<p>Multiple divisions can be selected by clicking on the division name. Only divisions that you have prior access to will be selectable. Select the appropriate division (if applicable). Multiple divisions can be selected by clicking on the division name. Selected divisions are displayed with “X” icon.</p> <p>Click the “X” to deselect a division. Selected Divisions are displayed in bold in the dropdown and the user can deselect the same by clicking on the division name. This field is only displayed for plans that maintain different divisions or locations for their participants.</p>
Display Active Loans Only	<p>Click this box to display only active loans in the plan. The system displays this field only if there is more than one loan type. If you uncheck this box and the plan has accounts with a loan status other than active, the batch contains the Loan Status for the applicable accounts.</p>

Templates Screen

After you have selected **Continue** from the File Browse screen, you’ll see the Templates screen. From here you can:

- Select a template
- Add a new template

- Delete a template

A template holds the format you define for the import file, including column headings. After you select your file, you'll define which column has SSN, loan amount, loan payment amount, etc. The template can be saved, so that you can reuse it or modify it to create another template next time.

Templates screen

Screen Options

- Select an existing template from the list of saved templates using the drop down.
- Click **Go** after selecting a template to go to the Existing Template screen
- Click **Delete** to delete the selected template
- Click **Create New Template** to go to the Create Template screen • Click **Back** to go to the Loan Repayments screen

Create Template Screen

You'll see this screen if you selected **Create New Template**. It is used to create a new template for an imported file. When creating a new template the following rules apply:

- New template name has a maximum of 15 characters for fixed width files and 20 characters for .csv and excel file formats.
- A maximum of 50 templates can be saved per plan.

- A value of “Not Applicable” will also be displayed to exclude any columns from the imported file.
- The new template may require a “Division/Location” column (If authorized for the plan).
- At any time while you are creating a template, you can click the **Save Template** button to save your changes.

Create Template screen

Fields

Field	Description
New Template Name	Enter a name for the new template.
From top to bottom, how many rows would you like to remove?	<p>Select the number of header rows contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored to obtain the file data. They will still appear on this screen to help you select the column headings</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of headers contained in the import file. Options include “No</p>

	<p>Headers" (default), and the values 1-9. When the file is imported, these header fields will be ignored."</p>
<p>From bottom to top, how many rows would you like to remove?</p>	<p>Select the number of trailer rows contained in the import file. Options include "No Trailers" (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.</p>

Voya PayCloud User Guide

Field	Description
	<p>g the question on, c the following</p> <p>text will display within op</p> <p>- up.</p> <p>p</p> <p>umber of trailers</p> <p>ude</p> <p>“N default), and</p> <p>When the</p> <p>Trailers the values 1 -9 file is rted, these trailer s</p> <p>be ignored.”field</p>
<p>Check Box if Have Dollar Implied Amounts</p>	<p>Check this box if the file has implicit decimals, importednchecked. . If your file leave this box un</p>
<p>Column Headings</p>	<p>Select a heading name for each column from the drop-down list. The list consists of the basic information such as name and Social Security number, the optional fields set as 'Required or Updateable' for the respective modules of the plan and an entry for each available source in the plan. To bypass a column, including nam select Not Applicable .</p>


Screen Options

- Click **Back** to go to the Select a Template screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors you will be taken to the Loan Input screen • Click **Save Template** to save the template

Map Column Header Screen

If you import a file other than an Excel or .csv, you will see a screen to select columns to appear in your new template. **Map column header screen - New Template**




Voya PayCloud
Help | Exit

Voya PayCloud Home > Loan Repayment > Templates > New Template Template

ABC INDUSTRIES - 551213

Create new template

- 1 Existing Template
New Template
- 2 From top to bottom, how many rows would you like to remove.
 Headers: No Headers
 Trainers: No Trainers
- 3 From bottom to top, how many rows would you like to remove.
- 4 Now select each column title:

Add template fields

Field Type
Select

Starting Position

Field Length

Add Field

Field Name	Starting Position	Field Length	
Social Security Number	5	9	Edit Delete
Loan Number	15	5	Edit Delete
Loan Amount	21	5	Edit Delete

Update Data

Uploaded Data


Social Security Number	Loan Number	Loan Amount
65555 000	3.65	7.55
52275 000	7.54	3.43
54354 000	3.23	4.54
73590 000	2.34	2.65
33864 000	5.43	4.56
96288 000	6.54	9.09

< Back
Cancel
Save And Continue
Save Template

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You can add template fields by selecting Field Type, Starting Position and Field Length. Click **Add Field** to add the field. The added fields will appear in the section below. You can either **Edit** or **Delete** an added field. Click **Update Data** to upload the data from the import file.

Map column header screen - Existing Template


Voya PayCloud
Help | Exit

Voya PayCloud Home > Loan Repayment > Templates > T11 Template

ABC INDUSTRIES - 551213

Existing Template

1

2 From top to bottom, how many rows would you like to remove.

Headers

Check this box if dollar amounts in file do not have decimal points.

3 From bottom to top, how many rows would you like to remove.

Trailers

4 Now select each column title:

Field Name	Starting Position	Field Length	
Social Security Number	1	10	Edit Delete
Loan Number	11	3	Edit Delete
Loan Amount	15	6	Edit Delete

Uploaded Data

Social Security Number	Loan Number	Loan Amount
696665555	000	3.65
507152275	000	7.54
254354354	000	3.23
684773590	000	2.34
382833854	000	5.43
657696288	000	6.54

< Back

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Existing Template Screen

If you select an existing template you will see the screen below. Existing templates can be modified and saved. Simply make any changes you need to make to any editable field, just as in the new template screen.

Existing Template screen

Fields

Field	Description
Existing Template	Template name.
From top to bottom, how many rows would you like to remove?	The number of headers can be selected. Upon clicking the question icon, the following text will display within a pop-up. “Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”

<p>From bottom to top, how many rows would you like to remove?</p>	<p>The number of trailers can be selected. Upon clicking the question icon, the following text will display within a pop-up. “Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”</p>
---	---

Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save template and perform validations. See the Error Corrections section for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Loan Input screen
- Click **Save Template** to save the template

Error Corrections

In case of errors upon clicking **Save and Continue**, the screen appears as below. Click **View Error Messages** to get a detailed view on the errors. A pop-up will display showing the error. All fields can be edited on this screen by manually clicking in the cell and typing the correct data.

Error Messages screen

Voya PayCloud

Voya PayCloud Home > Loan Repayment > Templates > TestLoan Template

ABC INDUSTRIES - 551213

✓ Template last saved on Tuesday, November 23rd, 2021 09:18:39 AM

View Error Messages

Existing Template
1 TestLoan

2 From top to bottom, how many rows would you like to remove. 3 From bottom to top, how many rows would you like to remove.

Headers: 1 Trailers: No Trailers

Check this box if dollar amounts in file do not have decimal points

4 Now select each column title:
This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

	A	B	C	D	E
	Social Security Number	Loan Number	Not Applicable	Loan Amount	Not Applicable
1	SSN		PRETAX	PAYMENT	
2	589554558	6001	50.00	119.9	001
3					

Back Cancel Save And Continue Save Template

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Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** after correcting errors to re-validate. Based on successful validation you will be taken to the Loan Input screen
- Click **Save Template** to save template

Error Message Details


SSN	Erreur
20689XXXX	SSN and Loan Number 001 not found.
35685XXXX	SSN and Loan Number 001 not found.
35685XXXX	SSN and Loan Number 002 not found.

Done

Screen Options

- Click **Print** to print the errors
- Click **Done** to close the pop-up and return to the Create Template screen for correcting the errors

Loan Repayments screen with process loan repayment manually selected


Voya PayCloud
Help | Exit

Voya PayCloud Home > Loan Repayment

ABC INDUSTRIES - 551213

To process a loan repayment:

- Please give this batch a name and enter a Payroll Date.

Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Display Active Loans Only
- Would you like to upload a file containing participant data?

Upload a file
I have a file with participant(s) data that I would like to import.

Process loan repayment manually
I will manually enter the participant data.

< Back
Continue

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Fields

Field	Description
Batch Name	Enter the batch name. Batch names cannot contain commas. Click the question icon next to the Batch Name for help information. The help information will display in a pop-up and will read “The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas.”
Payroll Date	Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1.
Select All Division/Location	Check this box to select all the divisions/locations in the plan for the batch (may not appear, depending on plan settings).
Select Division/Location	Changes divisions to display participants. Only divisions that you have prior access to will be selectable. Select the appropriate division (if applicable). Multiple divisions can be selected by clicking on the division name. Selected divisions are displayed with “X” icon. Click the “X” to deselect a division. Selected Divisions are displayed in bold in the dropdown and the user can deselect the same by clicking on the division name. This field is only displayed for plans that maintain different divisions or locations for their participants.

Display Active Loans Only	Click this box to display only active loans in the plan. The system displays this field only if there is more than one loan type. If you uncheck this box and the plan has accounts with a loan status other than active, the batch contains the Loan Status for the applicable accounts.
----------------------------------	---

Screen Options

- Click **Back** to go to the Home screen
- Click **Continue** to go to the Loan Input screen


Loan Input Screen

The loan input screen retrieves and displays all the active loans in the plan.

Loan Input screen

The participants will be sorted in alphabetical order by last name. You can sort the participant information by clicking on the column headers. An upward orange arrow indicates sorting of the column in ascending order and a downward orange arrow indicates sorting of the column in descending order. Some columns will have drop-down selection lists (these will differ based on your plan settings and permissions). Many of these values can be changed on this screen.

Fields

Field	Description
Payment Amount	<p>The Payoff Amount (if applicable) and Expected Amount are represented in a different color. You can manually enter the payment amounts, or you can select the payment amounts automatically by clicking either the Payoff Amount or the Expected Amount.</p>  <p>NOTE: While Loan Payoff is available to all users, it may not be activated. Contact Voya for assistance</p>
Multiply Payment Amounts by	<p>This button provides a drop-down list with values from 1-9. For example, if “2” is selected, the payment amount for all participants will be multiplied by two. Select the multiplier value to use for the payment amount. Then click the Multiply button.</p>

If you select **Payoff Amount** for a participant loan or enter the payoff amount in the payment field, a PAYOFF image is displayed. You can change your selection, however the last selected amount is the one displayed in the input box.

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Voya PayCloud

Voya PayCloud Home > Loan Repayment > Loan Payment Details

ABC INDUSTRIES - 551213

Payment amount: Changing the funding source (temporarily)

To populate payment amount you may do ANY of the following:

- Enter the amount
- Select Principal Balance
- Select Payoff Amount
- Select Expected Amount
- Multiply the Expected Amount at the bottom of the table

Select a different division/location to temporarily change the bank account for this loan Repayment.
This division/location will not be updated on the participant through the Loan Repayment batch. To permanently change a participant's division/location, use Participant Update.

Batch Name: Payroll Date:

Search by:

Name	SSN	Loan #	Principal Balance	Expected Amount	Payment Amount
DEJONG-DR DONALD	927005951	001	1,044.67	20.00	0.00
DOCKING-DR RUDOLF	706678188	001	527.99	30.06	0.00
GRAINGER-DR JEAN	235730073	001	50.66	65.91	-45.00
HUARD-DR GABRIEL	265675174	001	2,375.96	63.14	0.00
KONOPKA-DR TONIE	594613023	001	10,156.93	164.00	-43.00
MARLEY-DR BOYD	163465946	001	1,595.78	59.75	0.00
MART-DR GROVER	041896437	001	0,769.25	151.02	0.00
PLATT-DR FREEMAN	919701503	001	34,692.19	504.81	0.00
SEIGLER-DR ROBBY	574793411	001	45,917.90	507.49	-20.00
SIMIEN-DR AL	531659970	001	12,686.74	321.79	0.00
Total					108.00

Multiply **EXPECTED AMOUNT** and populate **PAYMENT AMOUNT** by

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Screen Options

- Click **Add Participants from Alternate Location** will open a new screen to Add Participant from another Division/Location to a batch file, or delete participants from the batch. You can click on the question symbol for help text. The following text displays “Only participants within your authorized division/location will display in the batch. If you need to submit loan repayments for a participant that has transferred to another unauthorized division/location, transferred to your authorized division/location, or is actively employed in multiple divisions/locations, you may add their SSN here.”
- Click **Back** to go to the Loan Repayments screen
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to go to the Pending or Submitted Batches screen A message in green font regarding successful batch file submission will display in the top left of the screen

Add Participants from Alternate Location screen

The Add Participants from Alternate Location screen allows you to add participants from another division or location to a contribution file, or delete participants from the batch. This is only available for some plans that use multiple locations. Participants from different divisions can be added to a pending batch. You can view the participants that have previously been added.

Add Participants from Alternate Location

Voya PayCloud Home > Contributions > Payroll > Add Participant to Batch

ABC INDUSTRIES - 551213

Only participants within your authorized division/location will display in the batch. If you need to submit contributions for a participant that has transferred to another unauthorized division/location, transferred to your authorized division/location, or is actively employed in multiple divisions/locations, you may add them here by using the search feature below. If you had previously added a participant to your batch, they will be displayed below and you may delete them at any time.

To add a participant, locate them via the search tool below and click 'Add'.

1 Select the Div Sub to apply funding to.

Select Division/Location to Apply Funding to SSN
 0001 HARDWOODS SPECIALTY PRODUCTS

*If the participant has transferred to your division/location and the division/location has not yet been updated, please contact the current division/location:
 Division/Location : 9999*

If the participant is actively employed in multiple divisions/locations and the primary division/location should be changed to your authorized division/location, please contact your relationship manager.

Search By
2 Search By SSN

3 Search Participant by SSN

Social Security Number	Participant Name	
123-45-6799	TEST, TEST ASD T	Add
999-99-0002	TAKEOVER 2	Add
999-99-0003	TAKEOVER 3	Add
999-99-0004	TAKEOVER 4, FN 4	Add

Added Participants		
TEST, TEST ASD	123456799 0001	Remove
TAKEOVER, 3	999990003 0001	Remove

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Select a Div/Sub to apply funding to.

To add a participant to the selected batch:

- Select a 'Search By' criteria
- Enter the corresponding value in the field and click **Search**
- From the Search results, select **Add** to add the participant(s)

To delete a previously added participant:

- From the Added Participants, select **Remove** to delete the participant(s)

Screen Options

Click **Done** to add the selected participants to the batch and go to the Loan Input screen

Pending or Submitted Batches screen – Success message

Pending or Submitted Batches screen – Success message

Voya PayCloud Home > Pending/Submitted Batches

ABC INDUSTRIES - 551213

Please select Batch Type

Batch Type: Pending Batches

To submit your batch for processing: (1) Select the circle to the left of the batch name and (2) click the Run Batch Button at the bottom of the screen.

Search by: Select Search

Batch Name	Batch Type	Payroll Date	Status	Scheduled Date	Division/ Location	EE PRE TAX	
<input type="radio"/> AutCont Error	Contributions	2021-11-23-5	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit Print Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-23-3	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit Print Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-23-2	Ready to Post		0001 HARDWOODS SP...	4.00	Edit Print Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-23-1	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit Print Delete
<input type="radio"/> ContLon Batch	Combined	2021-11-19-4	Ready to Post		0001 HARDWOODS SP...	0.30	Edit Print Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-19-3	Ready to Post		0001 HARDWOODS SP...	4.00	Edit Print Delete
<input type="radio"/> Test52	Loans	2021-11-15-10	Ready to Post		0001 HARDWOODS SP...	0.00	Edit Print Delete
<input type="radio"/> tst	Combined	2021-11-15-9	Ready to Post		0001 HARDWOODS SP...	10.20	Edit Print Delete
<input type="radio"/> Loan1152021	Loans	2021-11-15-8	Ready to Post		0001 HARDWOODS SP...	0.00	Edit Print Delete
<input type="radio"/> Template 1	Loans	2021-11-15-7	Ready to Post		0001 HARDWOODS SP...	0.00	Edit Print Delete

Back Run Batch

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If you're using an Imported Loan File:

- The Loan Input screen will also display the message “Your file has been successfully imported.”
- Continue** will execute validations and take you to the Pending/Submitted Batches screen
- If payoff amount = payment amount, the payoff image will be displayed on the Loan Input screen
- A button to populate payment amount for all participants will be available. The button will provide a drop-down with values from 1-9. For example, if “2” is selected, the payment amount for all participants will be multiplied by 2.

Contributions/Loan Repayment File Processing

Overview

This option allows you to process a file with contributions and/or loan repayment data. Includes the functions:

- Importing Contributions and/or Loan Repayment data on a single file
- Contribution and Loan Repayments set-up data
- Entering payroll and Loan Repayments data

If the plan has Contributions and/or Loan Repayments File Import activated, the Set Up screen will provide an option to import a file. After successfully importing a file, it will be added to the Pending/Submitted Batches list, where you can make final edits before manual submission. Click Contributions/Loan Repayment File

Processing tile on the Home screen to go to the Contributions and/or Loan Repayment processing pages.

Home Screen

The screenshot shows the Voya PayCloud Home Screen for plan 551213 - ABC INDUSTRIES. The interface includes a header with the Voya Financial logo, the plan name, and a 'Change Plan' link. Below the header, there is a grid of nine tiles representing different operations: 'Add/Enroll', 'Participant Update', 'Batch Participant Update', 'Contributions', 'Pending/Submitted Batches', 'Loan Repayment', 'Contributions/Loan Repayment', 'Bank Information', and 'File Upload'. A 'Transaction History' tile is located below the grid. At the bottom of the screen, there is a section for service hours and a disclaimer regarding insurance products and funding agreements.

Voya PayCloud Home
 551213 - ABC INDUSTRIES [Change Plan](#)
 Help | Exit

Select an operation from the tiles shown below

- Add/Enroll**
Add/Enroll participant
- Participant Update**
View/Update participant information
- Batch Participant Update**
Update multiple participants
- Contributions**
Process contributions to accounts
- Pending/Submitted Batches**
Review batch information
- Loan Repayment**
Process loan repayments
- Contributions/Loan Repayment**
Process a file with contributions and/or loan repayment data
- Bank Information**
Add or update assigned bank
- File Upload**
Submit a file with contributions and/or loan repayment data
- Transaction History**
View all the files submitted

The Voya PayCloud will be available during these hours:
 Monday through Friday from 7:00 AM - 7:30 PM EST
 Saturday from 6:00 AM - 12:00 AM EST
 Sunday from 12:00 PM - 7:00 AM Monday EST

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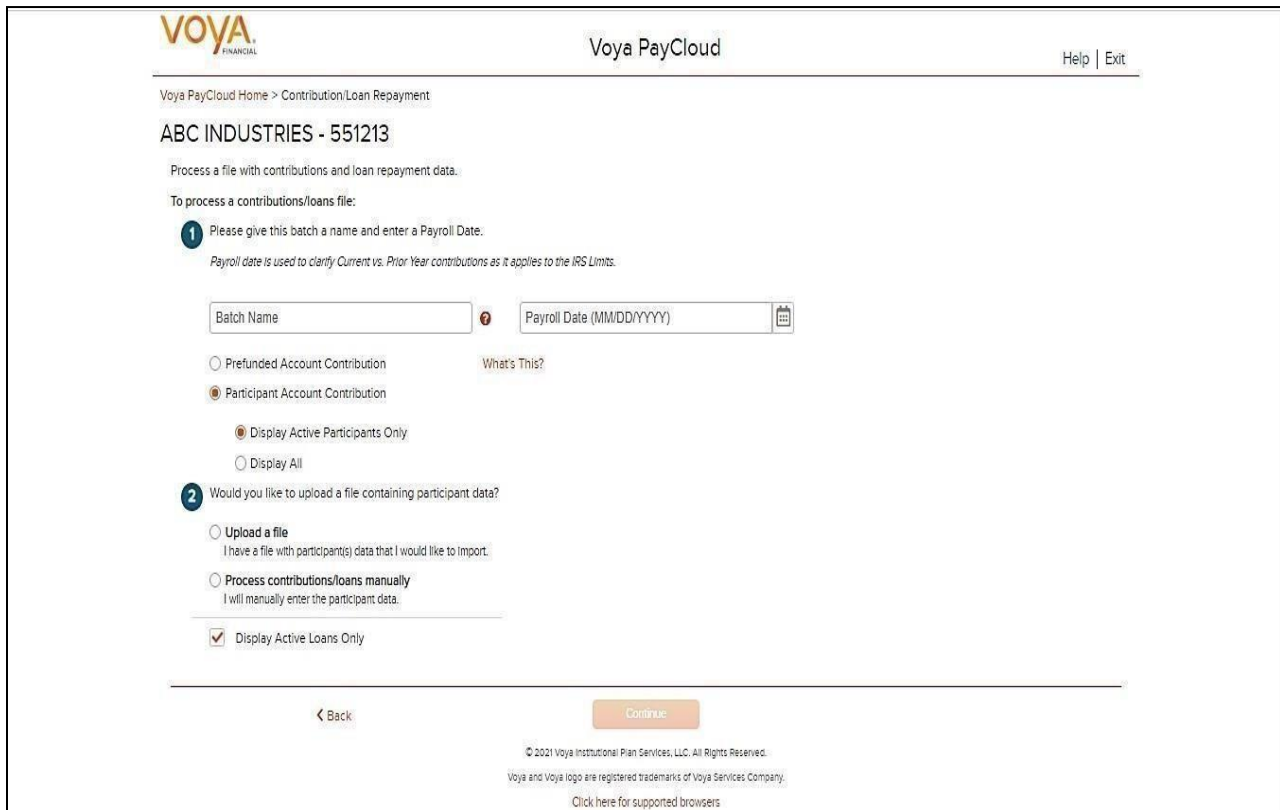
Contributions/Loan Repayments Set Up Screen

The Contributions/Loan Repayments set up screen allows you to enter Contributions/Loan Repayments set up data – Payroll Date, Select Prefunded Account Contribution or Participant Account Contribution, Division fields, Copy Payroll Data from, Sources.

If you select the 'Upload a File' radio button for Import a File, you will be presented with a File Browse section where you may select the appropriate file to be imported. See the Batch Files and Templates section for more details. If you want to make manual updates, select the 'Process Contributions Manually' radio button and enter the Contribution set up data and click Continue to go to Contributions Payroll Input screen for batch processing.

 **Note:** File upload feature is not applicable for Prefunded Account Contribution

Contribution/Loan Repayment Set Up Screen when Participant Account Contribution is selected, File Import activated, File Import – Upload File selected



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Voya PayCloud Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment

ABC INDUSTRIES - 551213

Process a file with contributions and loan repayment data.

To process a contributions/loans file:

1 Please give this batch a name and enter a Payroll Date.
Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Batch Name Payroll Date (MM/DD/YYYY)

Prefunded Account Contribution What's This?

Participant Account Contribution

Display Active Participants Only

Display All

2 Would you like to upload a file containing participant data?

Upload a file
I have a file with participant(s) data that I would like to import.

Process contributions/loans manually
I will manually enter the participant data.





Display Active Loans Only

[← Back](#) Continue

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Fields

Field	Description
-------	-------------

<p>Batch Name</p>	<p>Required field is used for memo purposes only. It allows you to enter a description for the payroll you are creating, so the description name is entirely your decision.</p> <p>Click on question symbol next to the field. The following text will display “The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas.”</p>
<p>Payroll Date</p>	<p>Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1.</p> <p> Note: Please use the correct plan year payroll date when remitting contributions. The payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.</p>
<p>Participant Account Contribution</p>	<p>Select this option to contribute to the Participant Account through the contribution batch</p>
<p>Display Active Participants Only</p>	<p>Select this option to include only active participants in the contribution batch. By default, this will be selected.</p> <p> Note: This option is available for selection only for Participant Account Contribution</p>
<p>Display Active and Ineligible Participants Only</p>	<p>Select this option to include participants which are either in an active status or ineligible status in the contribution batch</p> <p>Clicking on the help icon will display the below text in a pop-up: “Select this option if you wish to include participants which are either in an active status or an ineligible status.”</p> <p> Note: This option is available for selection (depending on plan settings) only for Participant Account Contribution</p>
<p>Display All Participants</p>	<p>Select this option to include all participants in the contribution batch</p> <p> Note: This option is available for selection only for Participant Account Contribution</p>

Screen Options

- Click **Browse** to select a Contributions/Loan Repayments file to import
- Click **View Sample File for formatting instructions** to open a PDF file showing formatting rules
- Click **Back** to return to the Home screen • Click **Continue** to go to the Templates Screen or Participants screen

File Browse

For any file import, the file must follow the rules below. The file type must be one of the following formats:

- Excel spreadsheet (.xls, .xlsx and .xlsm)
- Comma delimited file (.csv)
- Plain text (.txt)
- .fix
- .dat
- .mdo
- .md5
- .pay
- .wk3
- .wk4
- .prn

The imported file size must be greater than zero and less than 5MB.

All SSNs must have nine digits; leading zeroes must be included.

Negative amounts can be accepted. Please contact your administrator for more information on adding this function.



Note: When you are in the process of creating a template, and attempt to change screens, you will be prompted to save the template.

Contributions/Loan Repayments Import Formatting Rules

- All fields/cells should be formatted as TEXT.
- In MS-Excel; a green triangle indicator in the cell signifies that you have stored values as text.
- Comma Separated File (*.CSV) – Files must be comma delimited. Quotation marks must be removed from any values containing either single (' ') or double quotation (" ") prior to being imported.
- Fixed Width Files are acceptable. The same formatting rules apply to each field as Excel or (*.CSV).
- Some data categories will only be accepted by the system if they are allowed by the plan rules. For special circumstances, additional categories may be available or required but not listed in this document.
- Verify participant account balance prior to submitting adjustments with negative values. Accounts are subject to change and market value fluctuation.
- Confirm that all employees on the spreadsheet are entered into the system and that the enrollment process is complete.
- Multiple Loans per participant may be submitted on a single file
- Contributions and Loan Repayments can be included on the same spreadsheet.
- Import multiple payroll dates separately.
- If there are header/trailer lines, they must be identified when creating the template. Rows must be consecutive. Remove any blank rows.

Data Fields and Formatting

Social Security Number:

- Must contain 9 digits.
- Leading zeros must be included.
- Acceptable formats: 999-99-9999, or 999999999.
- If the Social Security number format does not contain hyphens, then ensure that the field is formatted as text

Participant name is not required.

Contribution source and Loan Repayment Amount columns:

- If the file does not contain decimals, please check the box titled, "Check this box if dollar amount in the file do not have decimal points." when mapping template.
- Do not include dollar signs or commas.
- Acceptable formats can either be: 999.99 (explicit decimal) or 99999 (implied decimal, assumes the two digits in the rightmost positions in the cell are cents; use the check box for this format).
- Division codes (if applicable):
 - Maximum 4 digits (valid values based on plan requirements): If you receive the following error message:

"Participant not in Authorized Division/Location. Please validate the Division/Location you entered. If you have entered the correct Division/Location, please contact your Plan Manager."

Indicate negatives with minus sign to the immediate left of the amount, no parenthesis. For example, 9999.99.

Negatives contributions are not permitted for loan repayments

Loan Number

- Three digits required and must include leading zeros (for example, 001,002,006)
- Refer to the loan amortization schedule for payment amount and loan number
- Loan Repayments: Payments must be the exact payment amount or an exact multiple of the scheduled repayment

Actual hours-Plan Year to Date (for vesting purposes):

- Overlay method replaces previous hours

Values should be accumulated by Sponsor and submitted to overlay the previous grand total

Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Anniversary hours (for plan eligibility rules):

- Overlay method-Values should be accumulated.
- Hours should be submitted in whole numbers, not exceeding four digits.
- If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Current Hours (Plan year or Anniversary hours): ○ Accumulate option – special set up required. The amount submitted will add to the total that exists on the system. ○ Hours should be submitted in whole numbers, not exceeding four digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Termination Date:

- Acceptable formats : MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY
- Must contain 8 digits
- Leading zeros in months must be maintained

Termination Reason:

- Valid values:
 - V - Voluntary
 - 1 – With Cause
 - 2 – Laid Off

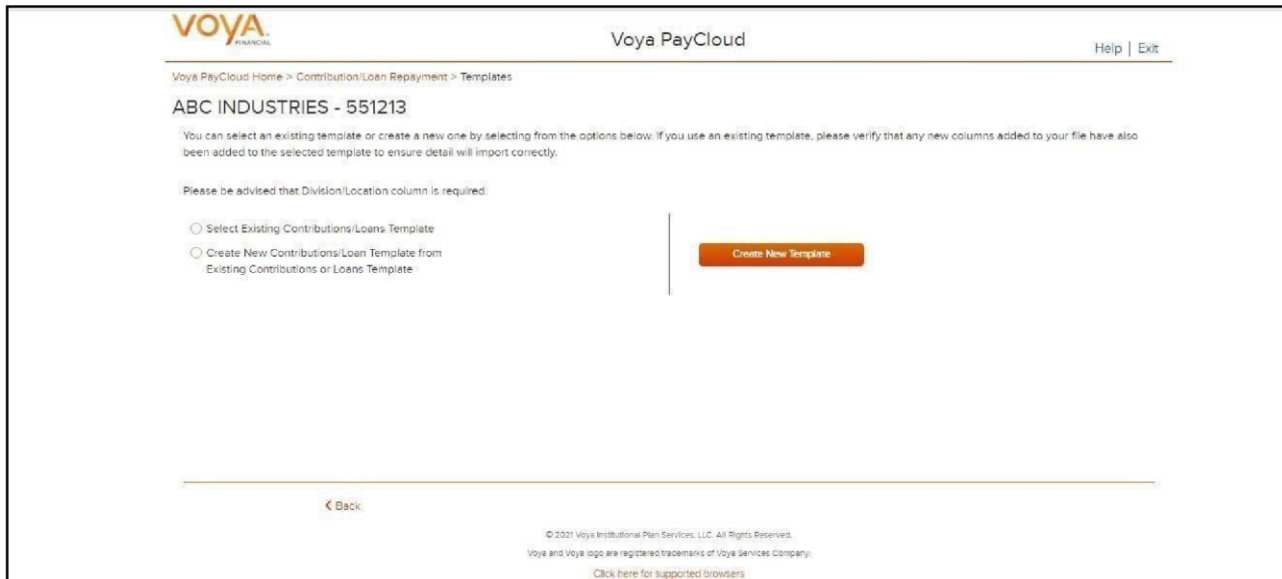
- 3 – Special
- 4 – Retirement
- 5 – Permanent Disability
- 6 - Death

Templates Screen

After you have selected **Continue** from the File Browse screen, you will see the Templates screen. From here you can:

- Select Existing Contribution/Loan Template
- Create New Contributions/Loan Template from Existing Contributions or Loans Template
- Create New Template

Templates screen



A template holds the format you define for the import file, including column headings. After you select your file, you'll define which column contains SSN, Contribution Amount, Employer Match, etc. The template can be saved, so that you can reuse it or modify it to create another template next time.

Screen Options

- On choosing the 'Select Existing Contribution/Loan Template' you will be provided with a drop down list of saved combined file templates o Click **Go** after selecting an existing template to go to the Existing Template screen o Click **Delete** to delete the selected template
- On choosing the 'Create New Contribution/Loan Template from Existing Contributions or Loans Template' you will be provided with the below two options to select from existing Contributions only template or Loans only template o Contributions o Loans
- Select Contributions and click **Go** after selecting an existing Contributions template to go to the Existing Template screen.
- Select Loans and click **Go** after selecting an existing Loan template to go to the Existing Template screen
- Click **Create New Template** to go to the Create Template screen

- Click **Back** to go to the Contributions/Loan Repayments Set Up screen

Create Template Screen

You'll see this screen if you selected **Create New Template**. It is used to create a new template for an imported file. When creating a new template, the following rules apply:

- New template name has a maximum of 15 characters for fixed width files and 20 characters for .csv and excel file formats.
- A maximum of 50 templates can be saved per plan.
- Optional data elements enabled for Contributions will also be displayed. The override name for the optional data element will be displayed.
- A value of "Not Applicable" will also be displayed to exclude any columns from the imported file.
- The new template may require a "Division/Location" column (if authorized for the plan).
- At any time while you are creating a template, you can click the **Save Template** button to save your changes.

Create a Template screen

The screenshot shows the 'Create a Template' interface. At the top, it says 'Voya PayCloud' and 'Help | Exit'. Below that, the breadcrumb is 'Voya PayCloud Home > Contribution/Loan Repayment > Templates > Create Template'. The plan name is 'ABC INDUSTRIES - 551213'. The main heading is 'Create a new template'. There are four numbered steps: 1. 'New Template Name' (input field). 2. 'From top to bottom, how many rows would you like to remove.' (dropdown, 'No Headers'). 3. 'From bottom to top, how many rows would you like to remove.' (dropdown, 'No Trailers'). 4. 'Now select each column title:'. Below step 4 is a table with columns A-F and rows 1-3. Row 1: 55N, ROLLOVER, EE PRETAX, ER PROFIT, Number of Hours, Anniversary Mts. Row 2: 4170198. Row 3: 7850493, 15.00, 2.00, 10.00, 250, 50. At the bottom are buttons: '< Back', 'CANCEL', 'Save And Continue', and 'Save Template'. Copyright text at the bottom: '© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company. Click here for supported browsers.'

Fields

Field	Description
New Template Name	Enter a name for the new template.

<p>From top to bottom, how many rows would you like to remove?</p>	<p>Select the number of header rows contained in the import file. Options include "No Headers" (default), and the values 1-9. When the file is imported, these header fields will be ignored to obtain the file data. They will still appear on this screen to help you select the column headings</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>"Select the number of headers contained in the import file. Options include "No Headers" (default), and the values 1-9. When the file is imported, these header fields will be ignored."</p>
<p>From bottom to top, how many rows would you like to remove?</p>	<p>Select the number of trailer rows contained in the import file. Options include "No Trailers" (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>"Select the number of trailers contained in the import file. Options include "No Trailers" (default), and the values 1-9. When the file is imported, these trailer fields will be ignored."</p>
<p>Check Box if Dollar Amounts Have an Implied Decimal</p>	<p>Check this box if the imported file has implicit decimals. If your file has decimals, leave this box unchecked.</p>
<p>Column Headings</p>	<p>heading name for each column from the drop-down list. The list consists of the following information including a Termination Date and Termination reason, Loan ID, Loan Number, the optional fields set as 'Required or Updateable' for each respective module of the plan and an entry for each available source in the plan. As a column, including name, select Not Applicable. If Loans are not allowed for a plan, the Loan information is not shown</p>

Screen Options

- Click **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home Screen.
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section below for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors you will be taken to the Contributions Payroll Input screen
- Click Save Template to save the template

Map Column Header Screen

If you import a file other than an Excel or .csv, you will see a screen to select columns to appear in your new template.

Map column header screen - New Template

Voya PayCloud

Voya PayCloud Home > Contribution/Loan Repayment > Templates > New template Template

ABC INDUSTRIES - 551213

Create new template

Existing Template
 1 New template

2 From top to bottom, how many rows would you like to remove.
 Headers: No Headers

3 From bottom to top, how many rows would you like to remove.
 Trailers: No Trailers

Check this box if dollar amounts in file do not have decimal points

4 Now select each column title:

Add template fields:

Field Type: Select
 Starting Position:
 Field Length:
 Add Field

Field Name	Starting Position	Field Length	
Social Security Number	5	9	Edit Delete
EE PRE TAX	15	2	Edit Delete
ROTH ROLL	19	2	Edit Delete
ROTH	21	2	Edit Delete

Update Data

Uploaded Data

Social Security Number	EE PRE TAX	ROTH ROLL	ROTH
85585 000	5	65	7
82275 000	7	54	5
54354 000	3	23	4
73580 000	2	34	2
33064 000	5	43	4
96288 000	5	54	9

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You can add template fields by selecting Field Type, Starting Position and Field Length. Click **Add Field** to add the field. The added fields will appear in the section below. You can either **Edit** or **Delete** an added field. Click **Update Data** to upload the data from the import file.

Map column header screen - Existing Template

Voya PayCloud

Voya PayCloud Home > Contribution/Loan Repayment > Templates > New template Template

ABC INDUSTRIES - 551213

Existing Template:

2 From top to bottom, how many rows would you like to remove. 3 From bottom to top, how many rows would you like to remove.

Headers: Trailers:

Check this box if dollar amounts in file do not have decimal points

4 Now select each column title:

Add template fields

Field Type: Starting Position: Field Length:

Field Name	Starting Position	Field Length	
Social Security Number	5	9	Edit Delete
EE PRE TAX	15	2	Edit Delete
ROTH ROLL	19	2	Edit Delete
ROTH	21	2	Edit Delete

Uploaded Data

Social Security Number	EE PRE TAX	ROTH ROLL	ROTH
65553 000	3	65	7
52275 000	7	54	3
54354 000	3	23	4
73590 000	2	34	2
33864 000	5	43	4
98288 000	6	54	9

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Existing Template Screen

If you select an existing template you will see the screen below. Existing templates can be modified and saved. Simply make any changes you need to make to any editable field, just as in the new template screen.

Existing Template screen

Fields

Field	Description
Existing Template	Template name.
From top to bottom, how many rows would you like to remove?	<p>The number of headers can be selected. Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”</p>

<p>From bottom to top, how many rows would you like to remove?</p>	<p>The number of trailers can be selected. Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”</p>
---	---

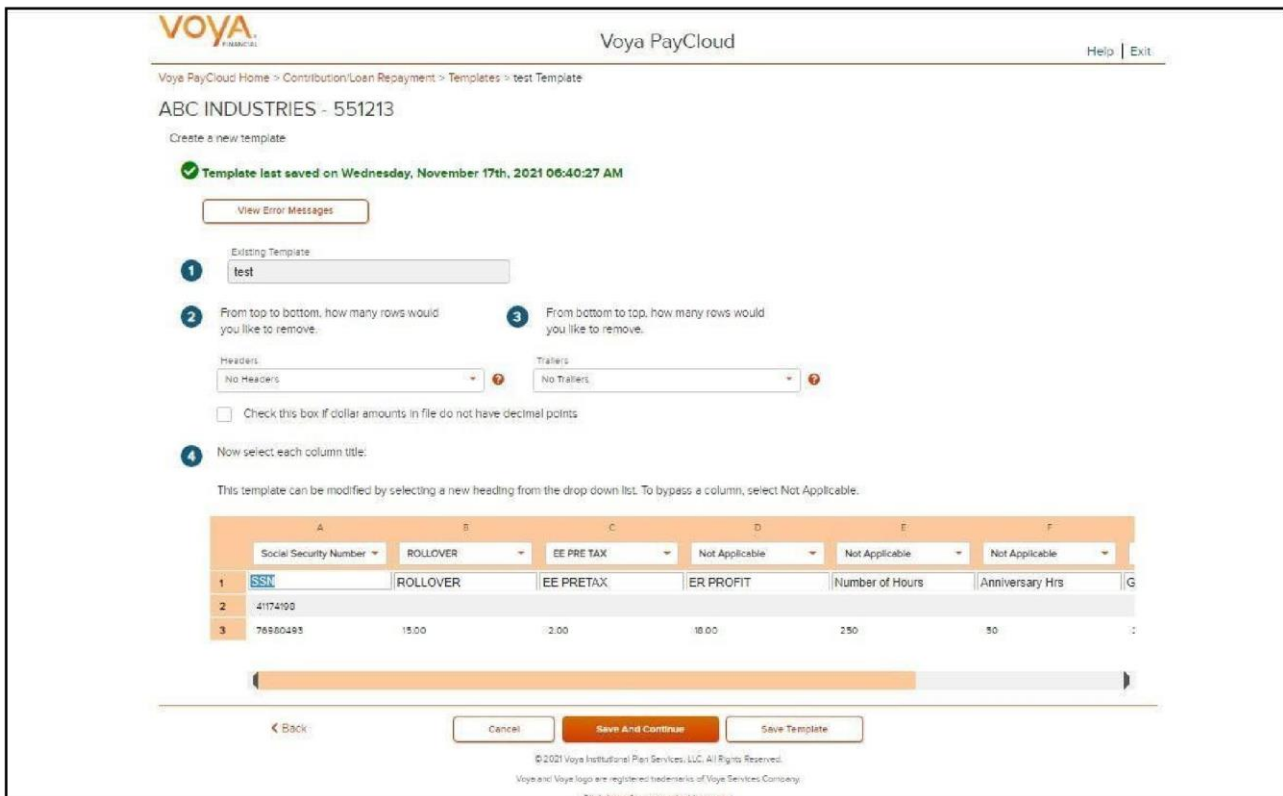
Screen Options

- Click **Back** to go to the Templates screen
- Click **Cancel** to go to the Home screen
- Click **Save and Continue** to save the template and perform validations. See the Error Corrections section for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Contributions Payroll Input screen
- Click **Save Template** to save template

Error Corrections

In case of errors upon clicking **Save and Continue**, the screen appears as below. Click **View Error Messages** to get a detailed view on the errors. A pop-up will display showing the error. All fields can be edited on this screen by manually clicking in the cell and typing the correct data.

Error Messages Screen



Screen Options

- Click **Back** to go to the Select a Template screen

- Click **Cancel** to go to the Home screen
- Click **Save and Continue** after correcting errors to re-validate. Based on successful validation, you will be taken to the Contributions Payroll Input screen
- Click **Save Template** to save template


Error Message Details

SSN	Error
XXXXX6188	Payment amount must match Expected Amount or the Payoff Amount.

Screen Options

- Click **Print** to print the errors
- Click **Done** to close the pop-up and return to the Create Template screen for correcting the errors

Contributions/Loan Repayments Set Up screen with process contributions manually selected


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment

ABC INDUSTRIES - 551213

Process a file with contributions and loan repayment data.

To process a contributions/loans file:

- 1 Please give this batch a name and enter a Payroll Date.**

Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Batch Name

Payroll Date

Prefunded Account Contribution [What's This?](#)
 Participant Account Contribution

Display Active Participants Only
 Display All
- 2 Would you like to upload a file containing participant data?**

Upload a file
I have a file with participant(s) data that I would like to import.

Process contributions/loans manually
I will manually enter the participant data.

Display Participants With Contributions

Copy Payroll Data From

The following sources are available to be included in your batch. Should you copy from an existing batch, the default sources will be populated based on the batch copied. If you need to add or delete sources from the batch, check or uncheck the sources as applicable.

Available Sources to Include in Batch


- EE PRE TAX
- ROTH ROLL
- ROLLOVER
- ROTH
- TAKEOVER
- SH MATCH

Display Active Loans Only

< Back
Continue

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Contribution/Loan Repayment Set Up screen with ‘Process Contribution/Loan Repayment Manually’ option selected for Prefunded Account


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment

ABC INDUSTRIES - 551213

Process a file with contributions and loan repayment data.

To process a contributions/loans file:
Please give this batch a name and enter a Payroll Date.

Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Batch Name

Payroll Date

Prefunded Account Contribution

Participant Account Contribution

What's This?

The following sources are available to be included in your batch. Should you copy from an existing batch, the default sources will be populated based on the batch copied. If you need to add or delete sources from the batch, check or uncheck the sources as applicable.


Available Sources to Include in Batch

- EE PRE TAX
- ROTH ROLL
- ROLLOVER
- ROTH
- TAKEOVER
- SH MATCH

< Back
Continue

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Contributions/Loan Repayments Set Up screen with 'Process contributions manually' option selected for Participant Account Contribution


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment

ABC INDUSTRIES - 551213

Process a file with contributions and loan repayment data.

To process a contributions/loans file:
Please give this batch a name and enter a Payroll Date.

1 Payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.

Batch Name

Payroll Date

Prefunded Account Contribution

Participant Account Contribution

Display Active Participants Only

Display All

What's This?

2 Would you like to upload a file containing participant data?

Upload a file

I have a file with participant(s) data that I would like to import.

Process contributions/loans manually

I will manually enter the participant data.

Display Participants With Contributions

Copy Payroll Data From:

The following sources are available to be included in your batch. Should you copy from an existing batch, the default sources will be populated based on the batch copied. If you need to add or delete sources from the batch, check or uncheck the sources as applicable.





Available Sources to Include in Batch





- EE PRE TAX
- ROTH ROLL
- ROLLOVER
- ROTH
- TAKEOVER
- SH MATCH
- Display Active Loans Only

< Back
Continue

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Fields

Field	Description
<p>Batch Name</p>	<p>Required field is used for memo purposes only. It allows you to enter a description for the payroll you are creating, so the description name is entirely your decision.</p> <p>Click on question symbol next to the field. The following text will display</p> <p>“The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas.”</p>
<p>Payroll Date</p>	<p>Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1.</p> <p> Note: Please use the correct plan year payroll date when remitting contributions. The payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.</p>
<p>Prefunded Account Contribution</p>	<p>Select this option to contribute to the Prefunded Account through the contribution batch</p> <p> Note: This option will display depending on the plan settings</p> <p>Clicking on the ‘What’s this?’ link will open the Prefunded Account Guide in a new window</p>
<p>Participant Account Contribution</p>	<p>Select this option to contribute to the Participant Account through the contribution batch</p>
<p>Display Active Participants Only</p>	<p>Select this option to include only active participants in the contribution batch. By default, this will be selected.</p> <p> Note: This option is available for selection only for Participant Account Contribution</p>
<p>Display Active and Ineligible Participants Only</p>	<p>Select this option to include participants which are either in an active status or ineligible status in the contribution batch</p> <p>Clicking on the help icon will display the below text in a pop-up: “Select this option if you wish to include participants which are either in an active status or an ineligible status.”</p> <p> Note: This option is available for selection (depending on plan settings) only for Participant Account Contribution</p>

<p>Select All Division/Location</p>	<p>Check this box to select all the divisions/locations in the plan for the contribution batch (may not appear, depending on plan settings).</p>
<p>Display Participants with Contributions</p>	<p>Filters for only the active plan participants that have made contributions (optional). This does not include active participants that have not contributed.</p> <p> Note: If you select the option to display participant with contribution, you must also select a batch to copy from. This option is applicable only for Participant Account Contribution</p>
<p>Copy Payroll Data From</p>	<p>This field contains a drop-down list of previously submitted payroll files (may not appear, depending on plan settings). You can choose to create a new payroll and copy the financial data from your last payroll. This may be helpful if your payroll does not contain many changes. This data can include hours, (which can be accumulated provided your plan is set up for this function).</p> <p> Note: Previously submitted payroll files are sorted by pay date, with the most recent batch displayed first. This option is applicable only for Participant Account Contribution</p>
<p>Source Selection</p>	<p>Checked sources will appear on the following batch screen. If you have chosen to copy payroll data from a previously submitted payroll file, the default sources will be prepopulated based on the file copied. You can add or delete sources (check or uncheck) as applicable.</p>
<p>Display Active Loans</p>	<p>Click this box to display only active loans in the plan. The system displays this field only if there is more than one loan type. If you uncheck this box and the plan has accounts with a loan status other than active, the batch contains the Loan Status for the applicable accounts.</p> <p> Note: This option is displayed only for plans offering Participant loans.</p>
<p>Display All Participants</p>	<p>Select this option to include all participants in the contribution batch</p> <p> Note: This option is available for selection only for Participant Account Contribution</p>

Screen Options

- Click **Back** to go to the Home screen
- Click **Continue** to go to the Contributions/Loan Repayments Payroll Input screen

Participants Screen

The Participants screen will display based on the plan settings. All the participants associated with the plan will display. A pagination option is provided to navigate through the list of participants. You can select all or specific participants for whom contributions are to be defined.

Participants screen

Voya PayCloud Home > Contribution/Loan Repayment > Payroll > Add Participant to Batch

ABC INDUSTRIES - 551213

Only participants within your authorized division/location will display in the batch. If you need to submit contributions for a participant that has transferred to another unauthorized division/location, transferred to your authorized division/location, or is actively employed in multiple divisions/locations, you may add them here by using the search feature below. If you had previously added a participant to your batch, they will be displayed below and you may delete them at any time.

To add a participant, locate them via the search tool below and click 'Add'.

1 Select the Div Sub to apply funding to.

Select Division/Location to Apply Funding to SSN

If the participant has transferred to your division/location and the division/location has not yet been updated, please contact the current division/location:
 Division/Location : 9999

If the participant is actively employed in multiple divisions/locations and the primary division/location should be changed to your authorized division/location, please contact your relationship manager.

2 Search By

3

Social Security Number	Participant Name	
123-45-6799	TEST, TEST ASD T	Add
999-99-0002	TAKEOVER 2	Add
999-99-0003	TAKEOVER 3	Add
999-99-0004	TAKEOVER 4, FN 4	Add

Added Participants				
TEST, TEST ASD	123456799	0001		Remove
TAKEOVER, 3	999990003	0001		Remove

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To search and add a participant:

- Select a 'Search By' criteria and enter the corresponding value in the field and click **Search**
- From the Search results, select **Add** to add the participant(s)

To add a participant or all participants:

- Check the specific participant(s) and select **Add** to add the participant(s) OR

- Check the 'Select All' option and select **Add** to add all the participants

To remove previously added participants:

- Check the specific participant(s) from the Added Participants list and select **Remove** to delete the participant(s)
- Check the 'Select All' option from the Added Participants list and select **Remove** to delete all the participant(s)

Screen Options

- Click **Back** to go the Contributions/Loan Repayments Set Up screen
- Click **Cancel** to go to the Home screen
- Click **Continue** to go to the Contributions/Loan Repayments Payroll Input screen

Contributions/Loan Repayments Payroll Input Screen

The Contributions/Loan Repayments Input screen allows you to enter or update either

- Contributions for the prefunded account or
- Contributions and Loan Repayments data for the participants

Based on your selection of Prefunded Account Contribution or Participant Account Contribution on the Contributions/Loan Repayments Set Up Screen.

For prefunded account contribution, only the prefunded account will be displayed and you may enter or update the contributions accordingly.

For participant account contribution, you may select and copy data from a previously submitted file and make changes based on current information, or you may generate a payroll using new information. If the participants do not have Loan Repayment data, all the Loan Repayment fields will default to zero and you will not be able to enter a Payment amount.


The participants are sorted in alphabetical order by default. You can sort the participants by clicking on any of the column headers. An upward orange icon indicates sorting of the column in ascending order and a downward orange icon indicates sorting of the column in descending order. A **Catch-Up** option, if available, will display and allow the user to designate catch-up contributions. A batch can include both catch-up and non-catch-up contributions.

If you have contributions for a newly eligible participant, you will need to create a new enrollment by selecting **New Enrollment** at the bottom of the screen. Once the enrollment is completed, you may continue entering payroll data on the Payroll Screen.



Note: Only plans offering New Enrollment functionality will see the **New Enrollment** button at the bottom of the screen.

Contributions/Loan Repayments Input screen – Prefunded Account Contribution


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment > Payroll

ABC INDUSTRIES - 551213

Your batch is ready for processing. Please be advised, the order of the source columns may have changed. Enter data into the appropriate columns.

Batch Name

Payroll Date

If you need to submit contributions for a participant that is not included in the batch below you may do so by using the buttons at the bottom of this page.


You may contribute to your Plan's Prefunded Account using this contribution batch by indicating the amount by money source you wish to contribute. Only positive amounts will be accepted by source.

Name	SSN	Status	EE PRE TAX	ROTH ROLL	ROLLOVER	ROTH	TAKEOVER	SH
P	999991001	00-Active And Eligible	0.00	0.00	0.00	0.00	0.00	0.00
Total			0.00	0.00	0.00	0.00	0.00	0.00

< Back
Cancel
Save And Continue

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Contributions/Loan Repayments Input screen – Participant Account


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment > Payroll

MARS ADVERTISING, INC. - 551214

Your batch is ready for processing. Please be advised, the order of the source columns may have changed. Enter data into the appropriate columns.

Payment amount

To populate payment amount you may do **ANY** of the following:

- Enter the amount manually
- Select **Principal Balance**
- Select **Payoff Amount**
- Select **Excepted Amount**
- Multiply the **Expected Amount** at the bottom of the table

Changing the funding source (temporarily)

Select a different division/location to temporarily change the bank account for this loan Repayment.

By selecting a division/location you are temporarily changing the bank account from which the funding for this Contribution or Loan Repayment is coming from. This division/location will not be updated on the participant record through the Contribution/Loan Repayment batch. To permanently change a participant's division/location, use Participant Update.

Batch Name

Payroll Date

If you need to submit contributions for a participant that is not included in the batch below you may do so by using the buttons at the bottom of this page.

Search by:

Name	SSN	Division/ Location	Alt Vest Date	Periods of Svc	Number Of Hours	Elig Hrs Anniv	Salary	Eligible Date
AGEE-DP, JACKELYN	47144xxxx	0001	11/23/2021	3	10.00	10.00	0.00	
ASHWORTH-DP, RENATO	58346xxxx	1003		5	0.00	4,212.00	0.00	
BALCH-DP, CHUNG	18244xxxx	1003		26	0.00	4,212.00	0.00	
BERESFORD-DP, CARMINA	99065xxxx	1001		9	10.00	4,212.00	0.00	
BLOSSER-DP, GEORGIANA	48243xxxx	1001		15	0.00	4,212.00	0.00	
BLOSSER-DP, LUVENIA	07749xxxx	1001		14	0.00	4,212.00	0.00	
BOURGOIN-DP, HALLEY	91247xxxx	1001		23	0.00	4,220.00	0.00	
BREW-DP, VICTOR	47347xxxx	1001		19	0.00	4,212.00	0.00	
BUONO-DP, KIANA	05741xxxx	1001		1	0.00	2,924.00	0.00	10/30/2018
CALLAHAN-DP, ERNA	39643xxxx	1001		8	0.00	4,212.00	0.00	
CARLIN-DP, MAREN up	01742xxxx							
Total								

By clicking on a participant's name, you can link to the Participant Update section to view or update participant information.

Multiply **EXPECTED AMOUNT** and populate **PAYMENT AMOUNT** by

< Back
Cancel
Save And Continue

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May, 2023

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Fields

Prefunded Account Contribution

Based on your plan settings, Division/Location values are selectable and you can select a different Division/Location for funding purposes. Only positive amount contributions are accepted for the prefunded account.

Participant Account Contribution

Some columns will have drop-down selection lists (these will differ based on your plan settings and permissions). Many of these values can be changed on this screen. If Division/Location values are selectable, each participant must have a value and used for contribution funding.

The **Payoff Amount** (if applicable) and **Expected Amount** are represented in a different color. You can manually enter the payment amounts, or you can select the payment amounts automatically by clicking either the Payoff Amount or the Expected Amount.

The Multiply Payment Amounts By option provides a drop-down list with values from 1-9. For example, if “2” is selected, the payment amount for all participants will be multiplied by two. Select the multiplier value to use for the payment amount. Then click the **Multiply** button.

If you select **Payoff Amount** for a participant loan or enter the payoff amount in the payment field, a PAYOFF image is displayed. You can change your selection, however the last selected amount is the one displayed in the input box.


By clicking on a participant’s name, you can link to the Participant Update section to view or update participant information. After finishing the updates to the participants, you will be returned to the Contributions/Loan Repayments Input screen. See Participant Update section for more details.

The Termination Date and Termination Reason Code may be updated as part of the batch file. The updates will be sent to the recordkeeping system at the time the batch is submitted and the confirmation is received

Multiple Division Plans

Sometimes multiple division plans that have restricted user access may have the need to remit a contribution for an employee that they are not the primary employer of within a plan. If a plan is authorized for multiple divisions, a separate column will be displayed in the table. By selecting a division/location, you are temporarily changing the bank account from which the funding for this Contribution will be deducted. The division/location will not be updated on the participant record through the Contribution batch. To permanently change a participant's division/location, use the Participant Update screen.

Contributions/Loan Repayments set up screen – Multiple Division Plan


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment > Payroll

MARS ADVERTISING, INC. - 551214

Your batch is ready for processing. Please be advised, the order of the source columns may have changed. Enter data into the appropriate columns.

Payment amount

To populate payment amount you may do ANY of the following:

- Enter the amount manually
- Select **Principal Balance**
- Select **Payoff Amount**
- Select **Excepted Amount**
- Multiply the **Expected Amount** at the bottom of the table.

Changing the funding source (temporarily)

Select a different division/location to temporarily change the bank account for this loan Repayment.

By selecting a division/location you are temporarily changing the bank account from which the funding for this Contribution or Loan Repayment is coming from. This division/location will not be updated on the participant record through the Contribution/Loan Repayment batch. To permanently change a participant's division/location, use Participant Update.

Batch Name: Payroll Date:

If you need to submit contributions for a participant that is not included in the batch below you may do so by using the buttons at the bottom of this page.

Search by:

Name	SSN	Division/Location	Alt Vest Date	Periods of Svc	Number Of Hours	Elig Hrs Anniv	Salary	Eligible Date
AGEE-DP, JACKELYN	47144xxxx	0001	11/23/2021	3	10.00	10.00	0.00	
ASHWORTH-DP, RENATO	58346xxxx	1003		5	0.00	4,212.00	0.00	
BALCH-DP, CHUNG	18244xxxx	1003		26	0.00	4,212.00	0.00	
BERESFORD-DP, CARMINA	99065xxxx	1001		9	10.00	4,212.00	0.00	
BLOSSER-DP, GEORGIANA	48243xxxx	1001		15	0.00	4,212.00	0.00	
BLOSSER-DP, LUVENIA	07749xxxx	1001		14	0.00	4,212.00	0.00	
BOURGOIN-DP, HALLEY	91247xxxx	1001		23	0.00	4,220.00	0.00	
BREW-DP, VICTOR	47347xxxx	1001		19	0.00	4,212.00	0.00	
BUONO-DP, KIANA	05741xxxx	1001		1	0.00	2,924.00	0.00	10/30/2018
CALLAHAM-DP, ERNA	39643xxxx	1001		8	0.00	4,212.00	0.00	
CARLIN-DP, MAREN up	01742xxxx							
Total								

By clicking on a participant's name, you can link to the Participant Update section to view or update participant information.

Multiply **EXPECTED AMOUNT** and populate **PAYMENT AMOUNT** by

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Screen Options

- Click **Add Participants from Alternate Location** opens a new screen to Add Participant from another Division/Location to a contributions/loan repayments file, or delete participants from the batch
- Click **Add Additional Participants** opens a new screen to add additional participants (not already present on the data file) to a contributions/loan repayments file, or delete participants from the batch
- Click **New Enrollment** to go to the Add/Enroll Participant screen
- Click **Back** to go to the Contributions/Loan Repayments Set Up screen
- Click **Cancel** to go to the Home Screen.
- Click **Save and Continue** to go to the Confirmation screen with the ability to print the screen. A message in green font regarding successful Batch addition will display in the top left of the screen.

Add Participants from Alternate Location screen

The Add Participants from Alternate Location screen allows you to add participants from another division or location to a contribution file, or delete participants from the batch. This is only available for some plans that use multiple locations. Participants from different divisions can be added to a pending batch. You can view the participants that have previously been added.

Add Participants from Alternate Location screen

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Voya PayCloud Home > Contribution/Loan Repayment > Payroll > Add Participant to Batch

ABC INDUSTRIES - 551213

Only participants within your authorized division/location will display in the batch. If you need to submit contributions for a participant that has transferred to another unauthorized division/location, transferred to your authorized division/location, or is actively employed in multiple divisions/locations, you may add them here by using the search feature below.

If you had previously added a participant to your batch, they will be displayed below and you may delete them at any time.

To add a participant, locate them via the search tool below and click 'Add'.

- Select the Div Sub to apply funding to.
 Select Division/Location to Apply Funding to SSN
 0001 HARDWOODS SPECIALTY PRODUCTS
- Search By
 Social Security Number
- Search Participant by SSN

Social Security Number	Participant Name	
123-45-6799	TEST, TEST ASD T	Add
999-99-0002	TAKEOVER 2	Add
999-99-0003	TAKEOVER 3	Add
999-99-0004	TAKEOVER 4, FN 4	Add

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Select a Div/Sub to apply the funding to.

To add a participant to the selected batch:

- Select a 'Search By' criteria
- Enter the corresponding value in the field and click **Search** o From the Search results, select **Add** to add the participant(s)

To delete a previously added participant:

- From the Added Participants, select **Remove** to delete the participant(s)

Screen Options

Click **Done** to go to the Contributions/Loan Repayments Input screen

Add Additional Participants Screen

The Add Additional Participants screen allows you to add participants that are not on the file.

Add Additional Participants Screen

Voya PayCloud Home > Contribution/Loan Repayment > Payroll > Add Additional Participants

ABC INDUSTRIES - 551213

If you need to submit contribution/loan repayments for a participant that is not displaying in your data file, you may add them here by searching for them using their SSN or Last Name.

Search By

1 Social Security Number

2 Search Participant by SSN

Participant Name	Social Security Number	
SCHOOLEY-DP, BOB	506-67-0301	Add
SAASDADS, SADASD S	213-12-3123	Add
SPATARO-DP, LELAND	728-69-1784	Add
SCHWANDT-DP, LONNY	107-63-3926	Add
SUMMERVILLE-DP,ROYAL	329-42-5848	Add
SFDDSF 435435, SFDDSF	254-33-2432	Add
ST-DP, TE	659-48-4342	Add
SINDELAR-DP, SANTOS	527-67-7556	Add
STAATS-DP, LLOYD	226-82-8022	Add
SOLLY-DP,OICKY	623-09-3772	Add
SOLLY-DP,PICKY	623-09-3771	Add

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To add a participant to the selected batch:

- Select a 'Search By' criteria and enter the corresponding value in the field and click **Search**
- From the Search results, select **Add** to add the participant(s)

To delete a previously added participant:

- From the Added Participants, select **Remove** to delete the participant(s)

Screen Options

Click **Done** to go add the selected participants to the batch and go to the Contributions/Loan Repayments Input screen

Pending/Submitted Batches Screen

Pending/Submitted Batches screen

Voya PayCloud Home > Pending/Submitted Batches

ABC INDUSTRIES - 551213

Please select Batch Type

✔ Your combined batch file has been added to the list of pending batches below.

To submit your batch for processing: (1) Select the circle to the left of the batch name and (2) click the Run Batch Button at the bottom of the screen.

Search by:

Batch Name	Batch Type	Payroll Date	Status	Scheduled Date	Division/ Location	EE PRE TAX	
<input type="radio"/> AutCont Error	Contributions	2021-11-23-5	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit Print Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-23-3	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit Print Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-23-2	Ready to Post		0001 HARDWOODS SP...	4.00	Edit Print Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-23-1	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit Print Delete
<input type="radio"/> ContLon Batch	Combined	2021-11-19-4	Ready to Post		0001 HARDWOODS SP...	0.30	Edit Print Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-19-3	Ready to Post		0001 HARDWOODS SP...	4.00	Edit Print Delete
<input type="radio"/> tst	Combined	2021-11-15-9	Ready to Post		0001 HARDWOODS SP...	10.20	Edit Print Delete
<input type="radio"/> Loan11152021	Loans	2021-11-15-8	Ready to Post		0001 HARDWOODS SP...	0.00	Edit Print Delete
<input type="radio"/> Template 1	Loans	2021-11-15-7	Ready to Post		0001 HARDWOODS SP...	0.00	Edit Print Delete
<input type="radio"/> B521	Combined	2021-11-15-6	Ready to Post		0001 HARDWOODS SP...	74.00	Edit Print Delete

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When Importing a Contributions/Loan Repayments File:

- The Contribution Input screen will also display the message “Your file has been successfully imported.”
- If the “Display Active Participants Only” box is unchecked, all participants not included in the imported file but found in the recordkeeping system will be displayed.
- Select **Continue** to advance to the Pending/Submitted Batches screen.
- By selecting a division/location, you are temporarily changing the bank account from which the funding for this Contribution will be deducted. The division/location will not be updated on the participant record through the Contribution batch. To permanently change a participant’s division/location, use the Participant Update screen.

Bank Information

Overview

If your selected plan is set up for ACH transmission then you will see a **Bank Information** tile on the Home screen. If you do not see a link, check with your Voya plan manager to change your bank information.

Home screen

The screenshot shows the Voya PayCloud Home screen for plan 551213 - ABC INDUSTRIES. The interface includes a header with the Voya logo and 'Voya PayCloud', and a 'Help | Exit' link. Below the header, there's a 'Change Plan' link and a prompt to 'Select an operation from the tiles shown below'. The main area contains ten tiles for different operations: Add/Enroll, Participant Update, Batch Participant Update, Contributions, Pending/Submitted Batches, Loan Repayment, Contributions/Loan Repayment, Bank Information, File Upload, and Transaction History. Each tile has an icon and a brief description of the operation. At the bottom, there are service hours, a disclaimer, and copyright information.

VOYA FINANCIAL Voya PayCloud Help | Exit

Voya PayCloud Home
551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

<p>Add/Enroll Add/Enroll participant</p>	<p>Participant Update View/Update participant information</p>	<p>Batch Participant Update Update multiple participants</p>
<p>Contributions Process contributions to accounts</p>	<p>Pending/Submitted Batches Review batch information</p>	<p>Loan Repayment Process loan repayments</p>
<p>Contributions/Loan Repayment Process a file with contributions and/or loan repayment data</p>	<p>Bank Information Add or update assigned bank</p>	<p>File Upload Submit a file with contributions and/or loan repayment data</p>
<p>Transaction History View all the files submitted</p>		

The Voya PayCloud will be available during these hours:
Monday through Friday from 7:00 AM - 7:30 PM EST
Saturday from 6:00 AM - 12:00 AM EST
Sunday from 12:00 PM - 7:00 AM Monday EST

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Bank Information Screen

To add or modify bank information, click the Bank Information tile on the Home screen. Current bank information will be displayed. You will then have the ability to modify or add bank information as

needed. Please review the policies and restrictions noted on the bottom of the Bank Information screen.

Bank Information screen

Voya PayCloud Home > Edit Bank Information

ABC INDUSTRIES - 551213

Please update the existing bank information as needed.

Bank Name:

Bank Address (Optional):

Bank Address2 (Optional):

Bank City:

Bank State:

Bank Zipcode(Optional):

Routing Number:

Confirm Routing Number:

Account Number:

Confirm Account Number:

Account Type:
 Saving
 Checking

Please remember the following when adding or changing the bank account:

- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.
- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day; past payments for prior-invested transactions will not be affected.
- Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

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Fields

Field	Description
Division/Location	Display Division/Location for the selected plan (If applicable)
Apply Banking Info to All Divisions/Locations	If your company has multiple divisions or locations entered in Voya PayCloud, you can click this box to make the banking information the same for all of them, even though only one was selected on the previous screen.
Bank Name	Enter the bank's name
Bank Address 1	Enter the bank's street address.
Bank Address 2	Enter the bank's street address.

Bank City	Enter the bank's city.
Bank State	Select the bank state from the drop - down list.
Bank ZIP Code	Enter the ZIP or postal code for the bank address.
Routing Number	Enter the bank's 9 - digit routing number. You can click on the question symbol for help text. Routing and Account number help pop-up will display. See screen below.
Confirm Routing Number	Re - enter the bank's routing number.
Account Number	Enter the bank's account number. You can click on the question symbol for help text. Routing and Account number help pop-up will display. See screen below.
Confirm Account Number	Re - enter the bank's account number.
Account Type	Select Checking or Saving

Screen Options

- Click **Back** to return to the Home screen
- Click **Cancel** to go the Home screen
- Click Continue to go to the Bank Information Verification screen

Routing Number and Account Number

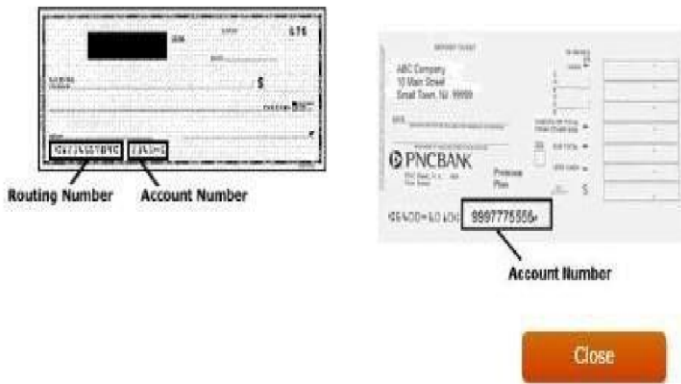
Help Locating the Routing Number and Account Number

The **Routing Number** is a 9 digit number that identifies your bank. It is usually located to the left of the account number at the bottom of a check. If you are using an account other than checking, contact your bank for the proper Bank Routing Number.

The **Account Number** is your checking or savings account number at your financial institution. It is usually located to the right of the Routing Number at the bottom of a check or savings deposit slip. Disregard any spaces or dashes in the middle.

Note: The check number is also printed at the bottom of the check but it should **not** be included as part of your account number.

Please refer to the check and savings deposit samples below to assist you in locating the Routing Number and Account Number.



Alert

Please remember the following when changing the bank account:

- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.
- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day; past payments for prior-invested transactions will not be affected.

Bank Information Screen – Multiple Division Plan

If ACH debit is active for your plan and/or division, the banking information will be displayed by division. Click **Edit** or **Add Bank** as needed to modify the information on file. Bank Information can be sorted by clicking on the column header. An upward orange arrow indicates sorting of the column in ascending order and a downward orange arrow indicates sorting of the column in descending order.

Bank Information screen – Multiple division plan with/without banking information

Voya PayCloud Home > Bank Information

MARS ADVERTISING, INC. - 551214

Bank Information is shown below for each division associated with your plan. You may add new bank information or edit existing bank information for any division/location shown.

Search by:

Division/Location Number	Division/Location Name	Bank Name	Account	Actions
0001	MARS ADVERTISING, INC.	TestBank12345	Savings	Edit
1001	MERCURY FULFILLMENT SYSTEMS, INC	TestBank12345	Savings	Edit
1002	EMARKETING, LLC	TestBank12345	Savings	Edit
1003	TPA, LLC	TestBank12345	Savings	Edit
1004	TWIN OAKS, LLC	TestBank12345	Savings	Edit
1005	MARS ADVERTISING, INC.	TestBank12345	Savings	Edit
1006	NOMADIC LLC	TestBank12345	Savings	Edit

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Screen Options

- Click **Back** to return to the Home screen

Add Bank pop-up

Add Bank

Please remember the following when adding or changing the bank account:

- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.
- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day; past payments for prior-invested transactions will not be affected.
- Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

Edit Bank Information Screen

Edit Bank Information screen

Voya PayCloud Home > Edit Bank Information

ABC INDUSTRIES - 551213

Please update the existing bank information as needed.

Bank Name: DCU_Test

Bank Address (Optional): Bank Address (Optional)

Bank Address2 (Optional):

Bank City: Marlborough

Bank State: MA

Bank Zipcode(Optional): 01752

Routing Number: 211391825

Confirm Routing Number: 211391825

Account Number: 44279999

Confirm Account Number: 44279999

Account Type: Saving Checking

Please remember the following when adding or changing the bank account:

- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.
- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day, past payments for prior-invested transactions will not be affected.
- Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

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- Click **Back** to go to Bank Information Screen
- Click **Cancel** to go to the Home Screen
- Click **Continue** to go to the Bank Information Verification Screen

Bank Information Verification Screen

Bank Information verification screen

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Voya PayCloud

Help | Exit

Voya PayCloud Home > Edit Bank Information > Verify Changes

ABC INDUSTRIES - 551213

Please verify the following bank information:

NOTE that the operation will not be complete until you click SUBMIT.

Bank Name	Routing Number
DCU_Test	211391825
Bank Address	Account Number
Marlborough, MA 01752	44279999
	Account Type
	Checking

By providing the bank account information above, the Plan Sponsor/Trustee acknowledges and affirms their agreement with terms and conditions previously agreed to regarding ACH Debit and authorizes Voya, on receipt of a payroll in an approved format, to debit from the account(s) listed the amount necessary to fund the contributions stated in the payroll submission. I agree to abide by those terms and conditions and by any instructions provided by Voya regarding the use of this service. Termination of this service will be effective upon Voya's receipt of a written termination request.

Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

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Screen Options

- Click **Back** to return to the Edit Bank Information Screen
- Click **Cancel** to go to the Home Screen
- Click **Submit** to save the Bank Information details. Bank Information confirmation pop-up is displayed

Bank Information Confirmation

Bank information confirmation pop-up

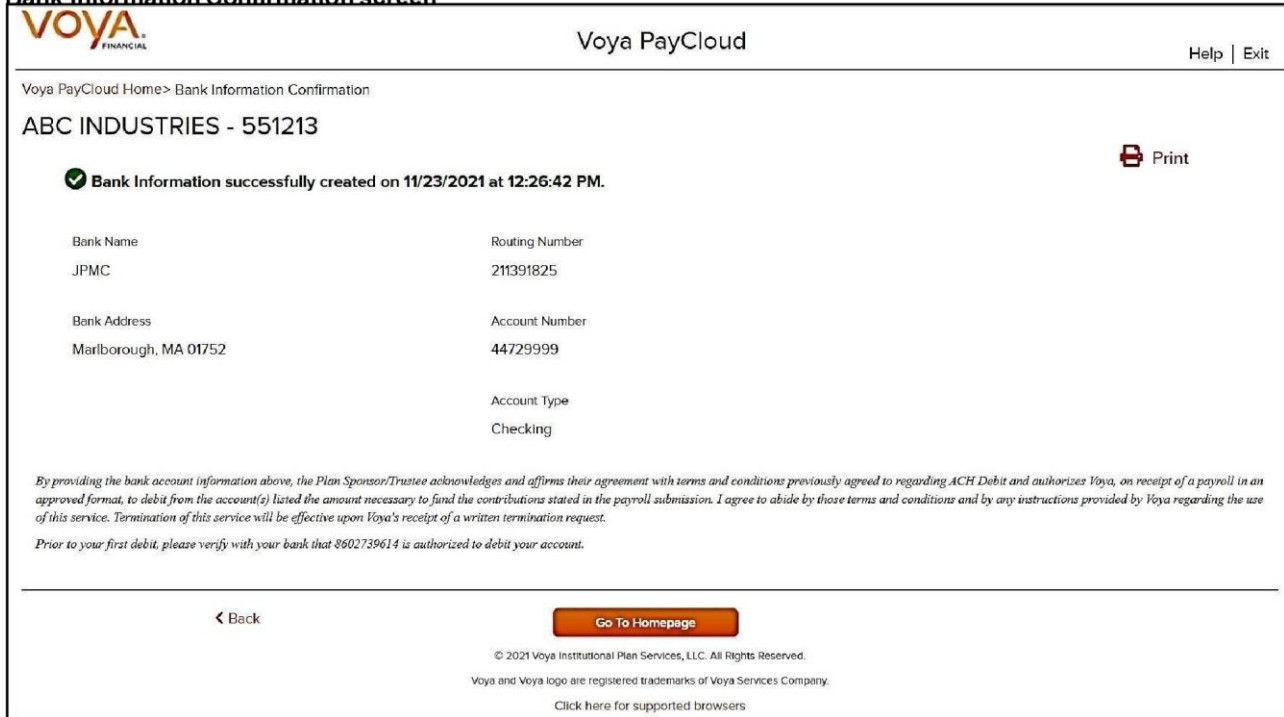
Bank Information Successfully Submitted

This is to confirm that ACH debit has been established for your plan. All electronic detail files remitted to Voya will result in a debit from the designated bank account. Submissions received by the close of the NYSE will be used for same day processing.

Prior to your first debit, please verify with your bank that Voya is authorized to debit your account. Voya's company ID is 8602739614.


- Click **OK** to go to Bank Information Confirmation screen with the ability to print the screen. A message in green font regarding successful Bank Information update file submission will display in the top left of the screen,


Bank Information Confirmation screen



Voya PayCloud Home > Bank Information Confirmation

ABC INDUSTRIES - 551213

 Print

 Bank Information successfully created on 11/23/2021 at 12:26:42 PM.

Bank Name	Routing Number
JPMC	211391825
Bank Address	Account Number
Marlborough, MA 01752	44729999
	Account Type
	Checking

By providing the bank account information above, the Plan Sponsor/Trustee acknowledges and affirms their agreement with terms and conditions previously agreed to regarding ACH Debit and authorizes Voya, on receipt of a payroll in an approved format, to debit from the account(s) listed the amount necessary to fund the contributions stated in the payroll submission. I agree to abide by those terms and conditions and by any instructions provided by Voya regarding the use of this service. Termination of this service will be effective upon Voya's receipt of a written termination request.

Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

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Screen Options

- Click **Go To Homepage** to go to the Home screen

Reports

Overview


The Reports section of Voya PayCloud updates when a participant changes his or her contribution deferral percent. Once created, the files will be placed in a database/directory readable by the Voya PayCloud application. Voya PayCloud provides printable copies of these reports and maintains an archive of past reports. These reports can be used to update the payroll system. This feature may not be available for all plans. Please check with your Account Manager for more details. Click on the Reports tile on the Home screen to go to the Report Selection screen.


Home screen


VOYA FINANCIAL Voya PayCloud [Help](#) | [Exit](#)


Voya PayCloud Home
551213 - ABC INDUSTRIES [Change Plan](#)


Select an operation from the tiles shown below



Add/Enroll
Add/Enroll participant



Participant Update
View/Update participant information



Batch Participant Update
Update multiple participants



Contributions
Process contributions to accounts



Pending/Submitted Batches
Review batch information


Loan Repayment
Process loan repayments


Contributions/Loan Repayment
Process a file with contributions and/or loan repayment data


Bank Information
Add or update assigned bank


File Upload
Submit a file with contributions and/or loan repayment data


Transaction History
View all the files submitted

The Voya PayCloud will be available during these hours:
 Monday through Friday from 7:00 AM - 7:30 PM EST
 Saturday from 6:00 AM - 12:00 AM EST
 Sunday from 12:00 PM - 7:00 AM Monday EST

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Reports selection screen


VOYA FINANCIAL Payroll Administration [Help](#) | [Exit](#)

Payroll Administration Home > Reports

ABC INDUSTRIES - 551213



ABC INDUSTRIES Run Date
 Bi-Weekly Deferral Change Report 03/28/2013 Run Time
23:03:33

Search by: 

Name	Part Id	Eligibility Date	Before Tax %	After Tax %	Catchup %
ARA	116563159	20120501	06.00	00.00	
RIV	118660702	00000000	04.00	00.00	
LAY	122942870	20130701	02.00	00.00	

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Click on any report title to display the text of the report in the main window. To print the report, click the printer icon.

Each report contains the following information:

- Plan Name and Address
- Run Date
- Run Time
- Report Name

For each participant:

- Name
- Participant ID
- Before Tax Percent
- After Tax Percent

Screen Options

- Click Back to go to the Home screen

File Upload

Overview

The File Upload section of Voya PayCloud will allow you to submit files to Voya for processing. The File upload functionality is used to upload only *.csv, *.txt and *.xlsx file formats. This feature is not available for all plans. Please check with your Account Manager for more details. Click on the File Upload tile on the Home screen to go to the File Upload screen.

Home Page

The screenshot shows the Voya PayCloud Home page for plan 551213 - ABC INDUSTRIES. The page features a grid of operation tiles. The 'File Upload' tile is highlighted in orange. Below the tiles, there is a section for service hours and a disclaimer.

Voya PayCloud Home
 551213 - ABC INDUSTRIES [Change Plan](#)
 Select an operation from the tiles shown below


- Add/Enroll**: Add/Enroll participant
- Participant Update**: View/Update participant information
- Batch Participant Update**: Update multiple participants
- Contributions**: Process contributions to accounts
- Pending/Submitted Batches**: Review batch information
- Loan Repayment**: Process loan repayments
- Contributions/Loan Repayment**: Process a file with contributions and/or loan repayment data
- Bank Information**: Add or update assigned bank
- File Upload**: Submit a file with contributions and/or loan repayment data
- Transaction History**: View all the files submitted

The Voya PayCloud will be available during these hours:
 Monday through Friday from 7:00 AM - 7:30 PM EST
 Saturday from 6:00 AM - 12:00 AM EST
 Sunday from 12:00 PM - 7:00 AM Monday EST

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File Upload Screen


Voya PayCloud
| Help | Exit

Voya PayCloud Home > File Upload

551213 - ABC INDUSTRIES

File upload details for selected plan

Select Division/Location

0001 AON PEP ▾

Data map



Select ▾

Select a File

Browse...

Date of Payroll

10/14/2022

← Back

Continue

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Fields

Field	Description
Select Division/Location	Changes divisions to display participants. Only divisions that you have prior access to, will be selectable. Select the appropriate division (if applicable). Selected Divisions are displayed in bold in the dropdown and the user can deselect the same by clicking on the division name. This field is only displayed for plans that maintain different divisions or locations for their participants.
Data Map	Select the Data map to be used for the File Upload process.
Select a File	Select 'Browse' to select a file to import
Date of Payroll	Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1. Note: Please use the correct plan year payroll date when remitting contributions. The payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.



Note: Please make sure that all dates entered conform to the format MMDDYYYY with no slashes. If dates are entered incorrectly, an error message will appear after you click the **Submit** button and all dates must be corrected

Screen Options

- Click **Back** to go to the Home screen
- Click **Cancel** to go to the Home screen
- Click **Browse** to select a file to import
- Click **Continue** to save the changes and go to the Transaction History Screen with the ability to view the status of the File Upload.

File Browse

The file type must be one of the following formats:

- Excel spreadsheet (.xlsx)
- Comma delimited file (.csv)
- Plain text (.txt)

Rules

- The imported file size must be greater than zero and less than 5MB.
- All SSNs must have nine digits; leading zeroes must be included.

Submission in Progress Pop Up

Submission In Progress

Your file submission is now in progress. You will be redirected to the Transaction History page where you will be able to monitor the status of your request. Please continue to monitor the Transaction History Page to confirm your file submission is successful. Click OK to continue to the Transaction History Screen.

OK

Screen Options

Click **OK** to be brought to the Transaction History screen. Refer to Transaction History section below for details.

Transaction History

Overview

The Transaction History section of Voya PayCloud allows the user to view all File Uploads activity. Contribution files may be edited from this screen if they are not in a Submission in Progress or Submitted status.

These File Upload Status include:

- Contains Errors – User will need to review errors, correct, and submit
- File Processing Error – File error that would require correction of the file and resubmission of the corrected file
- Scheduled – uploaded the file but will be submitted at a future date

The user will click on the Transaction History tile from the Home Screen or will be directed to Transaction History after a File Upload is submitted.

Home Screen

The screenshot displays the Voya PayCloud Home Screen for plan 551213 - ABC INDUSTRIES. The interface includes a header with the Voya Financial logo, the plan name, and a 'Change Plan' link. Below the header, there is a grid of tiles for various operations: Add/Enroll, Participant Update, Batch Participant Update, Contributions, Pending/Submitted Batches, Loan Repayment, Contributions/Loan Repayment, Bank Information, File Upload, and Transaction History. Each tile contains an icon, a title, and a brief description of the function. At the bottom of the screen, there is a section for service hours, a disclaimer about insurance products, and copyright information.

Voya PayCloud Help | Exit

Voya PayCloud Home

551213 - ABC INDUSTRIES [Change Plan](#)

Select an operation from the tiles shown below

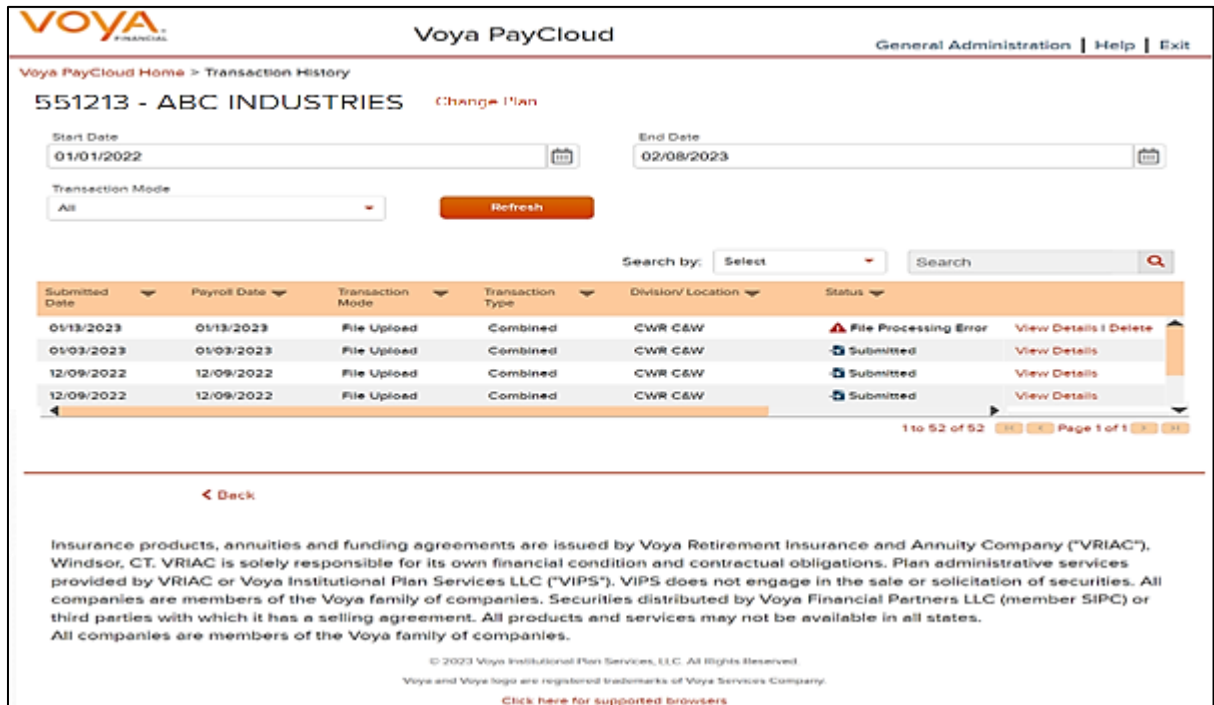
<p>Add/Enroll Add/Enroll participant</p>	<p>Participant Update View/Update participant information</p>	<p>Batch Participant Update Update multiple participants</p>
<p>Contributions Process contributions to accounts</p>	<p>Pending/Submitted Batches Review batch information</p>	<p>Loan Repayment Process loan repayments</p>
<p>Contributions/Loan Repayment Process a file with contributions and/or loan repayment data</p>	<p>Bank Information Add or update assigned bank</p>	<p>File Upload Submit a file with contributions and/or loan repayment data</p>
<p>Transaction History View all the files submitted</p>		

The Voya PayCloud will be available during these hours:
 Monday through Friday from 7:00 AM - 7:30 PM EST
 Saturday from 6:00 AM - 12:00 AM EST
 Sunday from 12:00 PM - 7:00 AM Monday EST

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Transaction History screen



Fields

Field	Description
Search By	Search Options: <ul style="list-style-type: none"> • Batch Name • Batch Type • Payroll Date • Status • Schedule Date • Division/Location • Contribution Total • Loan Total
Search	Ability to enter the search value for the selected Search Option
Start Date	Select the start date for the File Upload using the calendar icon.
End Date	Select the end date for the File Uploads using the calendar icon. Once both dates are entered the screen will refresh.
Transaction Mode	The user may select from the following options. <ul style="list-style-type: none"> • All • Batch • File Upload • Online

Note: The user may search on this screen as well by the column headers and entering a value in the search box. There is also the ability to sort by the column headers in ascending and descending order.

Screen Options

- Click **View Details** to view the error details
- Click **Delete** to delete the file that was uploaded but not submitted.
- Click **Cancel** to go to the Home screen

Error Details screen

Overview

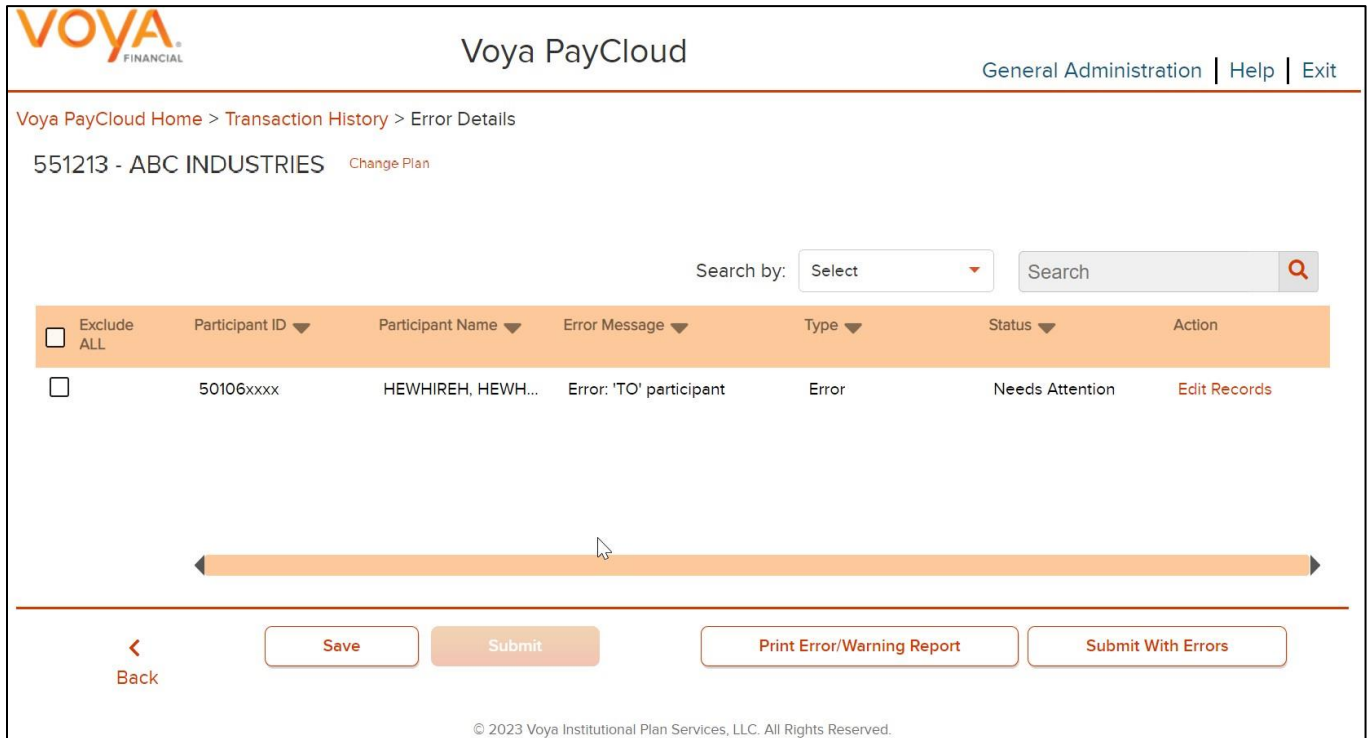
The Error Details feature in Voya PayCloud, allows the user to view errors and warnings on uploaded files. The user may print the list of errors and warnings, correct the fields in error or submit the file with errors. The Files with errors may be edited from this screen if they are not in a submitted status.

The below actions can be performed on a Pending batch. Select the batch and click:

- **Edit Records** to go to Error Correction screen to correct the fields in error.
- **Exclude All** checkbox to exclude all records that failed.
- **Exclude** to exclude the records from the file.

Click **Pending/Submitted Batches** to display the Pending/Submitted Batches screen. The default display is of Pending Batches (a list of all files created but not submitted), of payroll types (Contributions, Loans and Combined). Use the Batch Type pull-down to select **Submitted Batches** which will display submitted and deleted batches. Displayed batches are sorted in descending order of payroll date, then by payroll type.

Error Detail Screen



Voya PayCloud

General Administration | Help | Exit

Voya PayCloud Home > Transaction History > Error Details

551213 - ABC INDUSTRIES [Change Plan](#)

Search by: Search

<input type="checkbox"/> Exclude ALL	Participant ID ▼	Participant Name ▼	Error Message ▼	Type ▼	Status ▼	Action
<input type="checkbox"/>	50106xxxx	HEWHIREH, HEWH...	Error: 'TO' participant	Error	Needs Attention	Edit Records

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Fields

Field	Description
Search By	Search Options: <ul style="list-style-type: none"> • Batch Name • Batch Type • Payroll Date • Status • Schedule Date • Division/Location • Contribution Total • Loan Total
Search	Ability to enter the search value for the selected Search Option
Exclude All	Select Exclude All to excluded all of the records with errors from the file.
Edit Records	Allows the user to correct or update the information for the individual records.

Screen Options

- Click **Back** to go to the Transaction History screen

- Click **Save** to submit the batch for processing
- Click **Submit** if enabled, to submit the file once all errors are cleared.
- Click **Print Error/Warning Report** to print all of the errors for the file.
- Click **Submit with Errors** if enabled, to submit the file with errors that do not require attention.

Error Correction Screen

Voya PayCloud

General Administration | Help | Exit

Voya PayCloud Home > Transaction History > Error Details > Error Correction

551213 - ABC INDUSTRIES [Change Plan](#)

PARTICIPANT ID : 002669272

Field Name	Value
PhoneNum	7177206550
DefaultDeferralFlag	Y
BirthDate	19630215
DemographicEffectiveDate	20221019
EMailAddress	britness.fuat@test.com
AddrL3	SUNNYVIEW ESTATES

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[Back](#) [Reset Data](#) [Save](#)

Fields

Field	Description
Field Name	Contains the name of the field which contains an incorrect value.
Value	Modify the value to display the correct information for the corresponding field name.

Screen Options

- Click **Back** to go to the Transaction History screen
- Click **Reset Data** to reset the data if changes were made but not wanted.
- Click **Save** to save the changes made to the fields noted as having an error.

Need assistance?:

Please call 1-800-238-6212 to speak with a representative of Voya's Electronic Data Submission team. Representatives are available Monday through Friday from 8:30 AM – 6:00 PM EST.