

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 o Provide payroll funding via the Automated Clearing House (ACH). Refer to the Banking Information o 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 G 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.

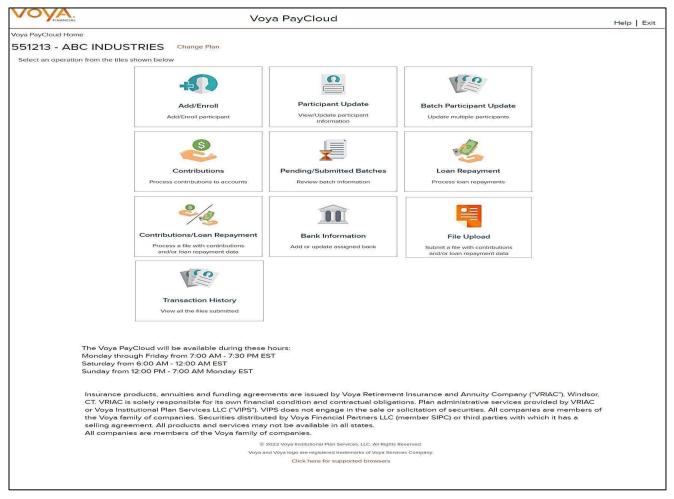
For more information, see System Security Overview

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



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

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- 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.

VOYA.	Voya PayCloud	
	Voya PayCloud Log Out Successful	
	© 2022 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company. Click here for supported browsers	

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 Search Q	
Plan Number 🔻 Plan Name 👻	
852501 Test plan 857805 SOLUTION PORTFOLIO	
555985 401K PLAN X 55X100 Corp Bonus Plan w AT 81A098 GERDES WHOLESALE & 1 to 100 of 7,904 (K < Page 1 of 80 2)	
List of Hub Plans	
Search by: Hub ID Search Q	
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	
I to 100 of 251 R Page 1 of 3 D I 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 Annu for its own financial condition and contractual obligations. Plan administrative services provided by VRIAC engage in the sale or solicitation of securities. All companies are members of the Voya family of companies SIPC) or third parties with which it has a selling agreement. All products and services may not be available All companies are members of the Voya family of companies.	or Voya Institutional Plan Services LLC ("VIPS"). VIPS does not s. Securities distributed by Voya Financial Partners LLC (member
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Click here for supported browsers	



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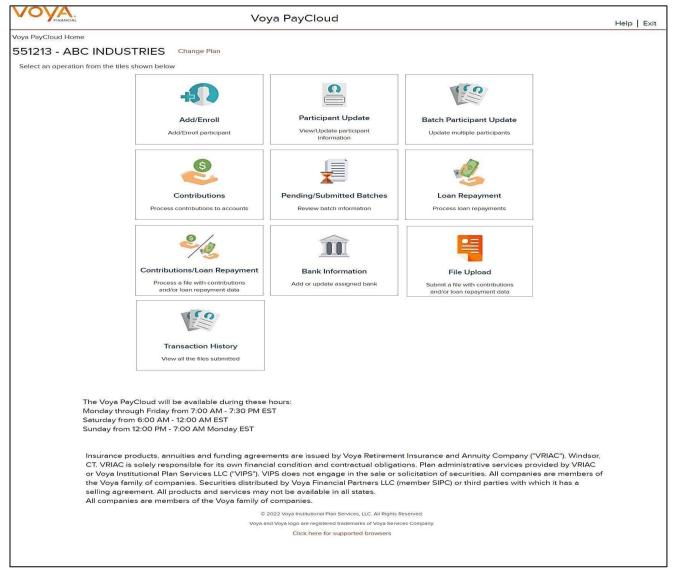
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Add/Enroll

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



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 o	r Enroll participant	t manually' selected
----------------------	-----------------	----------------------	----------------------

VOYA	Voya PayCloud	Help Exi
/oya PayCloud Home > Add/Enroll		
ABC INDUSTRIES - 551213		
To Add or Enroll a participant, would you like to u	pload a file [WITH THE PARTICIPANT DATA]?	
Upload a file I have a file with participant(s) data that I would	ike to import.	
Add or Enroll participant manually I will manually enter the participant data.		
r win manaday enter the paracipant data.		
	74	
< Back	Continue	
< Back	Continue	
< Back	Continue © 2021 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company.	

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

VOYA.	Voya PayCloud	Help] Es
Voya PayCloud Home > Add/Enroll		
ABC INDUSTRIES - 551213		
To Add or Enroll a participant, would you like to upload	a file [WITH THE PARTICIPANT DATA]?	
Upload a file I have a file with participant(s) data that I would like to	Import	
Add or Enroll participant manually I will manually enter the participant data.		
Select a File		
	Browse.	
	Drowse	
View Sample File for formatting instructions		
View Sample File for formatting instructions		



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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

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.

example: 45000.00).

Annual Salary Do not include dollar signs or commas (for

Submit in whole percentages only.

Special set-up required for fractional amounts.

Deferral	Must include decimal point, limit to two digits after the decimal.
Amount	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 Exclu	usion One character
•	Y - Exclude participant from 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
•	QDI/ (Y) - Enroll participant into the plan's G (N) or blank – Enroll participant using i	•
	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.

2 123455678 SAMPLE JOE R 1 MAIN ST APT #2 WINDSOR CT 060950001 1011980 01012000 0001 % 0123.3 3 010-23-6547 DOE JANE R 1 MAIN ST WINDSOR CT 060950001 01012001 01012001 0001 % 1/234 Enrollment Import File Sample in MS Excel Format Import.csv - Notepad Import.csv - Notepad	-	A	В	C	D	E	F	G	Н	1	J	K	L	M	N	0
3 010-23-6547 DOE JANE R 1 MAIN ST WINDSOR CT 06095 01011982 01012001 01012001 0001 6 1234 Enrollment Import File Sample in MS Excel Format Timport.csv - Notepad File Edit Format View Help SSN. LastName, First Name, MI, Addr1, Addr2, City, State, Zip , DOB, DOH, Plan Entry Date, Division/Location, PAYFREO, Emp number		hypen to maintain lead		First Name	м	Addr1	Addr2	City	State	(maintain	DOB-required	DOH-required	Date-if		4=Month 5=SemiMonth 6=BIVVeek	Emp.#
Enrollment Import File Sample in MS Excel Format The 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.PAYFREO.Emp number	_	a service of the serv			R	and the second se		and the set of the set							6	01234
Enrollment Import File Sample in MS Excel Format Timport.csv - Notepad Ele Edit Format View Help SSN.LastName.First Name.MI.Addr1.Addr2.City.State.Zip .DOB.DOH.Plan Entry Date.Division/Location.PAYFREO.Emp numbe																
File Edit Format View Help SSN.LastName.First Name.MI.Addr1.Addr2.City.State.Zip .DOB.DOH.Plan Entry Date.Division/Location.PAYFREO.Emp	-			JANE	R	1 MAIN ST		WINDSOR	CT	06095	01011982	01012001	01012001	0001	6	
55. LastName.First Name.MI.Addr1.Addr2.City.State.Zip .DOB.DOH.Plan Entry Date.Division/Location.PAYFREO.Emp numb	3	010-23-6547	DOE	2.25			cel Forn		CT	06095	01011982	01012001	01012001	0001	6	123
SSN.LastName.First Name.MI.Addr1.Addr2.City.State.Zip .DOB.DOH.Plan Entry Date.Division/Location.PAYFREO.Emp numbe	3 In	010-23-6547 rollment Imp	DOE DORT Fil	2.25			cel Forn		CT	06095	01011982	01012001	01012001	0001	ð	1234
	3 In	010-23-6547 rollment imp Import.csv - Note	DOE DORT Fil	2.25			cel Forn		СТ	06095	01011982	01012001	01012001	0001	6	1234
010-23-6547, DOE, JANE, R, 1 MAIN ST, WINDSOR, CT, 06095, 01011982, 01012001, 01012001, 0001, 6, 123456	3 En Ele SS	010-23-6547 rollment Imp Import.csv - Noter Edit Format Vie N, LastName, Fi 0123456, SAMPL	DOE port Fil pad ew Help rst Nam .E, JOE, R	e Samp	dr1,	n MS Exe Addr2,cit APT #2,WI	y, state, NDSOR, CT	nat Zip , DOB	, DOH, P	lan Entry 11980,010	Date, Di 12000, 01	vision/L 012000,0	.ocation	PAYER		umbe

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.

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

Full Name

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.
is USA or Canada.	State Code 2 characters are required if the count
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.
MM/DD/YYYY or MMDDYYYY.	Birth Date Acceptable formats: MM-DD-YYYY,
Eight digits are required. Leading zeros in months must be included. For examp 2.	ple, 02 for February, not
Employee must be between 15 and 75 years of age fo	or 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 Er	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 Voluntarv
- 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 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 Accumulate option (special set-up is required). The (plan year or amount submitted is added to the existing total. anniversary hours) 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 Salarv	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

hypen to maintain lead 1 zeros) Plan YTD Hours Term Date Term Reason LastName First Name MI Addr1 Addr2 City State lead ze		A	В	C	D	E	F	G	Н	J	K	L
	1 2 3	hypen to maintain lead zeros) 123455678	480			SAMPLE	JOE		1 MAIN ST	WINDSOR	СТ	Zip Code (maintair lead zer 1060950 1060950
	2	123455678	480			SAMPLE	JOE		1 MAIN ST	WINDSOR	СТ	06
		jle <u>E</u> dit F <u>o</u> rmat	<u>View</u> <u>H</u> elp									

010-23-6547,496,,,DOE,JANE,R,1 MAIN ST,,WINDSOR,CT,06095

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	Must be nine digits.
	Number	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.
	Participant Nam	e Not required
	Contribution Source	If the file does not contain decimals (values are implicit—see below), check the box labeled
	Columns	"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)
our-digit divi		not in authorized division/location," please validate the division/location you sion/location, please contact your plan manager.
	Actual hours, plan year- todate • (for vesting	Overlay method – values should be accumulated year-to-date. Hours should be submitted in whole numbers, not exceeding four
	purposes) •	digits. If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.
Annive		les should be accumulated year-to-date. eligibility rules) • Hours should be 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 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	Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY
Date	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

1.1	A	В	С	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	
7	111222333	60.00	60.00	
8	123456788	70.00	70.00	600
9				
L.	CSV.csv - I	Notepad		
Eile	e <u>E</u> dit F <u>o</u> rm	nat <u>V</u> iew <u>H</u>	elp	
00 10	N,EE Cont 0-00-000 0-00-000 1-05-777	4,-110.00 5,220.00, 7,1430.00),-10.00, 20.00,67	660 78 600

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	Must be nine digits.
	Number	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.
	Participa	nt 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)
divis		cipant not in authorized division/location," please validate the division/location you ect division/location, please contact your plan manager.
	Loan	Three digits required and must include leading zeros. For example: 001, 002, 006.

Number

our-digit

	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			
آ ،	Shee	t1 / Sheet2 / <	
			NUM

<u>File</u>	Edit Format View Help	
123 111	,Loan #,Payment -45-6789,001,47.58 -22-3333,002,55.68 -22-3333,003,75.01	

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.

y 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.

VOYA	Voya PayCloud	Help Ex
Voya PayCloud Home > Add/Enroli >	Templates	
ABC INDUSTRIES - 5	51213	
	e or create a new one by selecting from the options below. If you use an existing template, please verify that an ste to ensure detail will import correctly.	y new columns added to your file have also
Please be advised that Division/Loc	ation column is required.	
Existing Template Select	Co Create New Template	
Delete		
< Back	6	
< Beck	0 2021 Voya Institutional Plan Senices, LLC, All Rights Reserved. Voya and Voya logo are regiziered trademarks of Voya Services Company.	

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

Create		JSTRIES - 5		es > Create Tei B	ipiare								
	a new t	emplate											
1	N	ew Template Name											
2	you l	n top to bottom, how like to remove.	v many ro	ows would	3	you like to remov	op, how many rows w re:	bluc					
	Head	lers Headers			- 0	Trailers No Trailers		÷	0				
4		select each column t an appropriate he		m the dropdow	1 list for eac	h column. To bypass	a column, select Not	Applicable.					
4				m the dropdow		h column. To bypass C	a column, select Not	Applicable. D		E			
4		t an appropriate he					a column, select Not		•	E Column 5			
4		t an appropriate he	ading fro	E	i -	с				Contraction of the second	•		
4	Selec	t an appropriate he A Column 1	ading fro	E Column 2	i -	C Column 3	▼ Column 4			Column 5	*		
4	Selec	t an appropriate he A Column 1 SSN	ading fro	Column 2 ROLLOVER 20.00 15.00	i -	C Column 3 EE PRETAX 400 2.00	Column 4			Column 5 Div/Loc			
0	Selec	t an appropriate he Column 1 SSN 013-45-9998	ading fro	Column 2 ROLLOVER 20.00	i -	C Column 3 EE PRETAX 400	Column 4 ER PROFIT 17.00			Column 5 Div/Loc 1006	×		
4	Selec 1 2 3	t an appropriate he Column 1 SSN 013-45-9998 313-43-7023	ading fro	Column 2 ROLLOVER 20.00 15.00	i -	C Column 3 EE PRETAX 400 2.00	Column 4 ER PROFIT 1700 18.00			Column 5 Div/Loc 1006 1006	*		

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

a new template	3								
New Template Name									
you like to remove.	ws would	8	you like to remove.	ow many rows would					
No Headers	-				- 0				
Now select each column title: Select an appropriate heading from		for each c	column. To bypass a col	lumn, select Not Applica	able.				
		for each c	column. To bypass a col C	lumn, select Not Applica	sble.	E			
Select an appropriate heading fror	m the dropdown list	for each c			sble.	E Column 5			
Select an appropriate heading from	m the dropdown list		с	D			•		
Select an appropriate heading from	m the dropdown list B Column 2		C Column 3	D ← Column 4		Column 5			
Select an appropriate heading from Column 1 Column 1	m the dropdown list i B Column 2 ROLLOVER		C Column 3 EE PRETAX	Column 4		Column 5 Div/Loc	•		
	From top to bottom, how many ro you like to remove. Headers	From top to bottom, how many rows would you like to remove.	From top to bottom, how many rows would you like to remove.	From top to bottom, how many rows would you like to remove. Headers Trailers	From top to bottom, how many rows would you like to remove. Headers Trailers.	From top to bottom, how many rows would you like to remove. Headers Trailers	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. 4 Trailers. 4 Trailers.	From top to bottom, how many rows would 3 From bottom to top, how many rows would you like to remove.	From top to bottom, how many rows would you like to remove. Headers Traffers Traffers

Fields

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

h e d e r f i e I		ds 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."
From botton to top, how many rows would you lik to remov	e e	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. 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."
Check Box if Dollar Amou have a Implie Decim	nts an d	
Colum Headi		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 Appliacable.

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

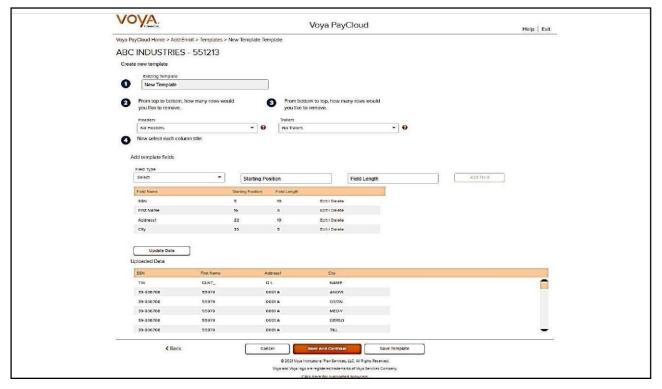
Map Column Header Screen

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.

	TIAL		Voya	PayCloud			Help E
1	lome > Add/Enroll > Templ JSTRIES - 55121	l <mark>ates</mark> > Test Template 1 Temp 13	olate				
EX	disting Template						
Те	est Template 1						
	n top to bottom, how many like to remove.	y rows would	From bottom to top, you like to remove.	how many rows would			
1		- 0	No Trailers	•	0		
This t	template can be modified l	by selecting a new heading	from the drop down list. T	o bypass a column, select No	t Applicable.		
	A	в	c	D	E		
		1 (C First Name	► Lost Name	E → Address1	- City	•
1			No.		The second second	1.1	
1 2	55N -	Not Applicable	▼ First Name	- Last Name	- Address1	- City	
	SSN -	Not Applicable DIVSUB	First Name FNAME	Lost Name LNAME	Address1 ADDRESS	- City CITY	
2	55N 55N 999984310	Not Applicable DIVSUB 1	First Name FNAME TESTFIRST	Lost Nome LNAME TESTLAST1	Address1 ADDRESS 123 MAIN	City CITY ANY	

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



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?	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."
	For an existing template, headers associated with the field will be prepopulated and are updateable
From bottom to top, how many rows would you like to remove?	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."
	For an existing template, trailers associated with the field will be prepopulated and are updateable
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

ABC	123									
1	Con	isting Template em_Enroll_15Jan								
2		n top to bottom, how m like to remove. ders	nany rows would	• 0	From bottom to top you like to remove. Trailers No Trailers), how many rows would	- 0			
4	Now	select each column title	e:							
4				new heading f	rom the drop down list.	To bypass a column, seler D	ct Not Appl	icable. E		
4		template can be modifi		В			ct Not Appl		*	
4		template can be modifi A	ied by selecting a r	в ,	c	D		E		
4	This t	template can be modifi A SSN	ied by selecting a r	в ,	C First Name	D Address1		E	Ŧ	
0	This t	template can be modifi A SSN SSN	Last Name ROLLOVER	в ,	C First Name EE PRETAX	Address1 ER PROFIT		E City DIv/Loc	*	
4	This t 1 2	template can be modified SSN SSN 013-45-9998	Last Name ROLLOVER	в ,	 First Name EE PRETAX 4.00 	Address1 ER PROFIT 17.00		E City DIv/Loc 1006	Ŧ	

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.

	ANCIAL				Voya	PayCloud					Hel
Cloud	d Home > Add/Enroll >	• Template	es > Test Template	1 Templa	ate						
INC	USTRIES - 5	51213	3								
Temp	plate last saved on	Tuesday	November 23rd	1, 2021	02:14:16 PM						
	View Error Messages										
	Existing Template										
65	Test Template 1										
1	The second second										
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			selecting a new hea	ading fro	om the drop down list. To C	bypass a column, select N D	lot Appl	licable. E			F
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	is template can be mo	dified by :	В		c	D		E	_		
Thi	is template can be mo A SSN	dified by :	B Not Applicable		C First Name	D Last Name		E Address1		City	
Thi	is template can be mo A SSN SSN	dified by :	B Not Applicable DIVSUB		C First Name FNAME	Last Name LNAME		E Address1 ADDRESS	A	City CITY	
Thi 1 2	is template can be mo A SSN SSN 999984310	dified by :	B Not Applicable DIVSUB		C First Name FNAME TESTFIRST	Last Name UNAME TESTLAST1		Address1 ADDRESS 123 MAIN	A A		
Thi 1 2 3	s template can be mo A SSN 999984310 999984311	dified by :	B Not Applicable DIVSUB 1 1		C First Name FNAME TESTFIRST TESTFIRST	Last Name LNAME TESTLAST1 TESTLAST2		E Address1 ADDRESS 123 MAIN 123 MAIN	A A A	City CITY NY NY	
Thi 1 2 3 4	s template can be more SSN 999984310 999984311 999984312	dified by :	B Not Applicable DIVSUB 1 1 1		C First Name FNAME TESTFIRST TESTFIRST TESTFIRST	Last Name LINAME TESTLAST1 TESTLAST2 TESTLAST3		E Address1 ADDRESS 123 MAIN 123 MAIN 123 MAIN	A A A	CITY CITY NY NY	
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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

		🖨 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.	

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.</number></field>	Add lead zeros if loan number is less than 3 digits.

"Loan payment amount should be equal to the expected amount or a multiple of the expected amount"	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.	The error message will display the column heading.
"Participant Division/Location Required"	Appears if the import file does not include Division/Location code values for each participant.	Appears if a participant is missing a Division/Location (which is required).
"Participant Not in Authorized Division/Location"	Verify that the participant's division code is correct.	You cannot import a participant for a division that you are not authorized for.
"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."	Verify that the date of birth is correct, in the correct format (MM- DDYYYY) and falls within the VLIP DOB range.	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).
"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."	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).	This appears if contribution election types (\$ or %) are inconsistent among the different sources, for a given participant.
"xx-xx-xxxx - Social Security number must be 9 digits."	Verify that the SSN has nine digits.	SSN is not nine digits.
"xxx-xx-xxx- Participant Social Security number not found."	Verify that the SSN exists in the plan.	Appears if the SSN not in the recordkeeping system.
Example " <field> cannot be negative"</field>	Verify the amounts do not have negatives or parenthesis.	The error message will display the column heading.

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

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)**

		ANCIAL				Voya Pay	Cloud			Help
Existing Template Test Template 1 Form top to bottom, how many rows would you like to remove. Headers Trailers No railers No velocit 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 SN A B C D E F Cty F SN A B C D E F Cty F SN A B C D E F Cty F SN A B C D E F Cty F SN A B C D E F Cty F Cty F S SN S C C C SN SN S SN S	yCloud	I Home > Add/Enroll >	Template	es > Test Template 1	1 Templa	ate > Verify Information				
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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	Voya PayCloud	Help Exit
Voya PayCloud Home > Add/Enroll Confirmation		
ABC INDUSTRIES - 551213		
		🔒 Print
Your file has been successfully imported.		
Your enrollment file has been successfully importe	d 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	
	© 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 **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

FINANCIAL	Voya PayCloud	Help E
/oya PayCloud Home > Add/Enroll > Add/Enroll Participant Info	rmation	
ABC INDUSTRIES - 551213		
Add/Enroll a participant in the plan		
Social Security Number (NNNNNNNN)		
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

FINANCIAL	Voya PayCloud	Help
PayCloud Home > Add/Enroll > Add/Enroll Partici	ant Information	
C INDUSTRIES - 551213		
id/Enroll a participant in the plan		
Social Security Number (NNNNNNNN)	Emall Address (Optional)	
Last Name	First Name MI	
Address Line 1	Address Line 2 (Optional)	
	State	
City	Select	
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 Has the participant elected the Morningstar Ma 	aged Account Program?	
Is this a QDIA default enrollment 🧧		
-		
K Dack	Cancel Communications	
	Voya and Voya logo are registered trademarks of Voya Services Company.	

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	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.
	(This option is only displayed if the option is available to your plan.)
Participant elected MorningStar Account Management Program	Displays only if the plan participates in MorningStar program
QDIA default enrollment	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.
	You can click on the question symbol 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.
	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.
	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." Note: This option is not available for all plans.

Is this a Default Enrollment?	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.
	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.
	Contact Voya for further information

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 PayCloud	Help E
a PayCloud Home > Add/Enroll > Add/Enroll	Participant Inform	ation	
BC INDUSTRIES - 551213			
dd/Enroll a participant in the plan			
Social Security Number (NNNNNNNN) 012-56-7878			
012-00-1010		Email Address (Optional)	
Last Name		First Name	
Test		Error MI	
Address Line 1			
319 Trailside Way		Address Line 2 (Optional)	
<u></u>			
City		State	
Ashland		Select	
Country		Zlp Code	
United States of America	+	01721000	
		Please enter a valid Zip Code	
Date of Birth (MM/DD/YYYY)	i	Date of Hire (MM/DD/YYYY)	
Status			
04-Eligible; Not Participate			
Enroll this participant			
< Back		Cancel	
		© 2021 Voya Institutional Plan Services, LLC, All Rights Reserved.	
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		Click here for supported browsers	

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

VOVA		Voya PayCloud		Help Exit
Voya PayCloud Home > Add/Enroll > Add/Enroll Participan	Informa	tion > Additional Information		
ABC INDUSTRIES - 551213				
to be serviced when allowed investory files. Also include writing				
Add/Enroll a participant in the plan				
(-	Payroll Frequency (Optional)		
Alt Vest Date (Optional) (MM/DD/YYYY)] 0	Select		
Sex				
Select	•	E Mail Address	1	
5		5		
< Back		Cancel Cominue		2
		© 2021 Vevo Instituteoral Dian Converse LLC, All Dishts Reconverse		
		© 2021 Voya Institutional Plan Services, LLC, All Rights Reserved Voya and Voya logo are registered trademarks of Voya Services Con		
		Click here for supported browsers		

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

VOY	NCIAL	Voya PayCloud	Help Exit
Voya PayCloud I	Home > Add/Enroll > Add/	Enroll Participant Information > Additional Information > Contribution Elections	
ABC IND	USTRIES - 5512	13	
Please indicat	te contribution elections be	low .	
Contribution I			
EE PRE TAX		ROTH	
Percent .	10.00	% Percent = 80.00 %	
Catch-Up Cor	tribution Elections		
ROTH			
Percent -	85.00	x	
Investment E	ections		
Please choos Select Source		tions" or choose the specific sources of money that you want to invest differently for future money.	
Across	ALL Sources Elections		
LRI ER	Elections		
ROTH	RLLOVER Elections		
MURRI	EY ER Elections		
PRIOR	MATCH Elections		
- ROLLO	VER Elections		
ER MA	TCH Elections		
LEMAY	PS Elections		
ROTH	Elections		
ONEC.	Elections		
TAKEO	VER Elections		
LEMAY	S'H Elections		
PRETX	MTCHD Elections		
	< Back	Cancel	
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		Voya and Voya logo are registered texternaris of Voya Services Company.	
		Click here for supported browsers	

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

Voya PayCloud	Help Exi
Participant Update Participant Information > Additional Information > Contribution Elections > Investment Elections	
he full Investment name, hover over the Fund Name.	
Search by: Select	Q
Across ALL Sources	
0%	-
0%	
0%	
0%	
0%	
0%	
0%	
0%	
0%	
100 %	
Cancel Continue	
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	Participant Update Participant Information > Additional Information > Contribution Elections > Investment Elections he full Investment name, hover over the Fund Name. Search by: Select Search Sear

Contributions can be allocated to individual funds on this screen.

Fields

Field	Description
Fund	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.
Amounts	The Total field should equal 100. These investments will be made across all sources of money.

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

NOVA	Voya PayCloud	Help Exit
Voya PayCloud Home > Add/Enroll > Add	/Enroll Participant Information > Additional Information > Contribution Elections > Investment Elections	
ABC INDUSTRIES - 55	1213	
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 to	his default enrollment investment selection, please contact your Plan Manager.	
< Back	Cancel Continue	
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	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 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.	Voya Pa	ayCloud		Help Exit
/oya PayCloud Home > Participant Update Search Par > Verify Information	rticipant > Participant Update Participant Infor	mation > Additional Information >	Contribution Elections > Investment Elections	
ABC INDUSTRIES - 551213				
Please verify the following information and press SU	BMIT to complete the operation (you may nee	ed to scroll down to view the enti	re page).	
Participant Name ST TE-DP	Participant Address PO BOX 363 0.00 LITCHFIELD PARK, AZ 853400 USA	1363	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	Туре	Amount		
EE PRE TAX ROTH	%	4.00 0.00		
Catch-Up Contribution Elections Source ROTH	Type %	Amount 0.00		
K Back	Cancel	Edit		
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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

OYA.	Voya PayO	Cloud		Help Exit
a PayCloud Home > Acc Enroll Confirmation				
SC INDUSTRIES - 551213				
Participant (Bern Brandon) successfully	enrolled on 10/16/2019 at 06:03:14.		-	Print
ere are the details of the enrollment submitted on N	0/16/2019 at 06:03.14			
Participant Name	Participant Address		Social Security Number	
Bern Brandon	63 Wall Street		xxxxx 5787	
	Buffalo, NY 14223			
	USA			
Date of Birth	Date of Hire		Status	
10/02/1983	07/02/2019		00-Active and Eligible	
Salary	Peyrol Frequency		Federal Marital Status	
45000.00	Monthly		Single	
Contribution Elections Source	Type	Amount		
EE PRE TAX	×	10.00		
ROTH	N N	80.00		
Cetch-Up Contribution Elections Source	Туре	Amount		
ROTH	×	85.00		
00IA Default Investment	Default Enrolment			
No	Yes			
This participant has been enrolled to the following f Fund Name Voya Solution 2050 Portfolio Srv	und based on the plan's default investment selection	24,		
If there are any questions regarding this default enr	oliment investment selection, please contact your P	Plan Manager.		
This is for default investment purposes only. This action will no	t invoke the auto-enroll process for the participant			
	Go Té) Homepage		
	© 2019 Voya Institutional Plan Services	U.C. ALEXAND Received.		

Add/Enroll Confirmation screen – Default Enrollment option not performed

VOYA.	Voya Payo	Cloud		Help Ex
/oya PayCloud Home > Add/Enroll Confirmation	n			
BC 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		Social Security Number XXXXI 5787	
	Buffalo, NY 14223 USA			
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	Туре	Amount		
EE PRE TAX	N	10.00		
ROTH	N	80.00		
Cetch-Up Contribution Elections Source	Type	Amount		
ROTH	×	85.00		
ODIA Default Investment	Default Enrollment			
No	No			
Fund Name		Across ALL Sources		
ABC_IC_31		50%		
LongName36		50%		
		komepage		
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	Click here for supported to			

Screen Options

Click Print to print a copy of the confirmation screen

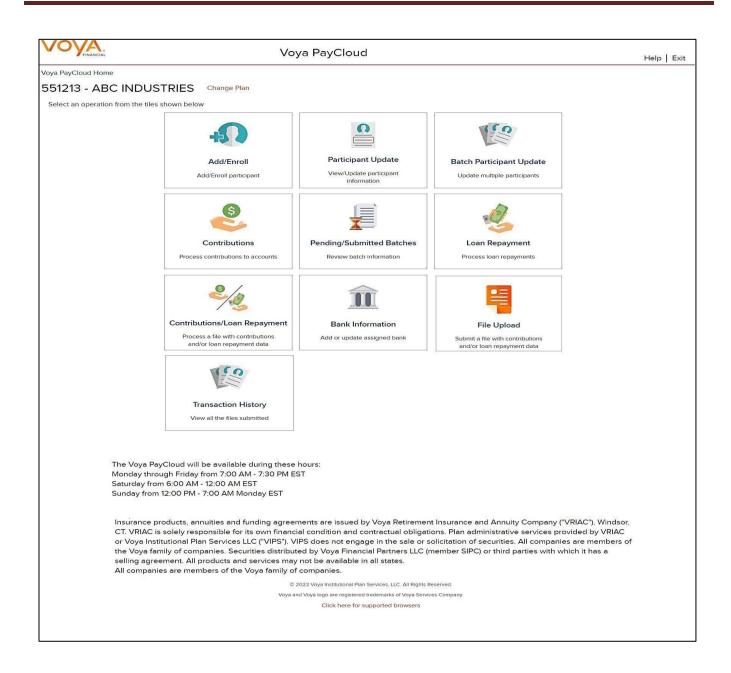
Click Go to Homepage to go to the Home screen

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



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

VOYA.		Voya PayCloud	Help Exi
Voya PayCloud Home > Particip	ant Update Searc	h Participant	
ABC INDUSTRIES	- 551213		
	001210		
Enter search criteria below			
Search By			
Search By SSN		Search Participant by SSN Search	
Search By SSN			
Search By Last Name			
¢.	Back		
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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

Voya PayCloud Home > Pa	articipant Update Sear	ch Participant		
ABC INDUSTRI	ES - 551213			
Select a participant	20 00.210			
serect a participant				
Search by:	Select 👻	Search	a	
Social Security Number 👻	Participant Name			
789-07-8900	т.1		-	
347-64-2404	TE-DP. ST			
123-43-2123	TEDST, TEST			
142-56-3452	TEST 3, FIRSTTES	т з		
123-78-9456	TEST BADI, TEST	RAGHAV		
485-94-5849	TEST PI, PI			
584-75-8475	TEST P2, P2			
849-85-9458	TEST PARTICIPAN	IT 2, TEST 2		
545-48-5787	TEST PARTICIPAN	IT 4. TEST 4		
963-96-3963	TEST RA, RA R			
998-87-7665	TEST TEST, DF			
4				
4			• • •	
	< Back			

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

OYA FINANCIAL		Voya P	ayCloud	Help E
a PayCloud Home > Participant Update Searc	h Participant > P	articipant Update Participant Infor	mation	
BC INDUSTRIES - 551213				
pdate participant information				
Social Security Number (NNNNNNNN)		Email Address (Optional)		
099492652		JEREMIAHDECKERT-DP@	XYZ.COM	
Last Name		First Name		
DECKERT-DP		JEREMIAH	MI	
Address Line 1		Address Line 2 (Optional)		
2608 CALIFORNIA RD		0.00		
City		State		
ELKHART		IN	-	
Country		Zip Code		
United States of America 🔹		465141222		
Date of Birth		Date of Hire		
06/01/1959	ė	02/23/2015	Ē	
		Termination Reason		
Termination Date (MM/DD/YYYY)		Select	-	
Status				
00-Active And Eligible				
< Back		Cancel	Continue	
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		Voya and Voya logo are registered trac		

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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.

Termination Reason	Reason for the termination:
	RetirementPermanent Disability
	Death
	Voluntary Termination
Do You Want to Make the Participant Active?	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.
Has the Participant Elected the Morningstar Managed Account Program?	Morningstar election checkbox (if applicable for your plan).
Is this a QDIA Default Enrollment?	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.
	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.
	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.
	•
	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."
	Note: This option is not available for all plans.

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.
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.
Contact Voya for further information

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

OYA.		Voya PayCloud	
loya PayCloud Home > Add Errol Confirm	ation		
BC INDUSTRIES - 551213			
Update participant information		a to	
		Email Address Stional	
Social Security Number (NNNINNNNN) X0000(4198		ANHRODRIGUZ-DP@XYZ.COM	
Last Name RODRIGUZ-DP		Piret Name ANH MI	
NUDRIGGE DF		(MARINE CONTRACTOR OF CONTRACT	
Address Line 1			
961 WELLINGTON ST		Address Line 2 (Optional)	
City		State	
MARIE, ONTARIO		NJ -	
Country		Zip Code	
United States of America		91758	
Date of Birth		Date of Hive	
11/17/1982		06/16/2014	
New York Control (1997)		Second Autors Internet	
Termination Date 05/28/2019		Termination Reeson Voluntary Termination	
00101010		Constrainty (Children and Children and Child	
ř.	1441	Leave of Absence Start Rescon	
Absence Start Date (MM/DD/YYYY)		Select *	
		Leeve of Absence End Resson	
Absence End Date (MM/DD/YYYY)		Select *	
Sterus 00-Active and Eligible			
< Back		Cancel Continue	
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		Voye and Voye logs are registered flademarks 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: 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: 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."

FINANCIAL	Voya PayCloud	
Voya PayCloud Home > Participant Update Search Part	ticipant > Participant Update Participant Information	
ABC INDUSTRIES - 551213		
Update participant information		
Social Security Number (NNNNNNNNN) 423093770		
425055770		
Last Name	First Name	
ALMAN-DP	YICKY MI	
Address Line 1		
2213 B	Address Line 2 (Optional)	
Construction of the second s		
City	State	
TULSA	OK 🝷	
Country	Zip Code	
United States of America	- 98899	
	ZIp code is not valid for the state	
Date of Birth	Date of Hire	
11/19/1987	10/09/2018	
10/15/150/	100032010	
Termination Date	Termination Reason	
12/12/2018	Voluntary Termination *	
Status 00-Active And Eligible		
< Back	Cancel	
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Additional Information Screen

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

VOYA.		Voya PayCloud	Help]
Voya PayCloud Home > Participant Update Search	Participant > Pa	rticipant Update Participant Information > Additional Information	
ABC INDUSTRIES - 551213			
Update participant information			
		Payroll Frequency (Optional)	
Alt Vest Date (Optional) (MM/DD/YYYY)	iii 0	Select 💌	
Termination Date (Optional) 12/12/2018	i	E Mail Address	
12/12/2010	1	E Mair Address	
-			
< Back		Cancel Continue	
Codek		Control Control	
		O 2021 Yove Instaurional Plan Services, LIC, All Richts Reserved	
		© 2021 Voys Instancional Film Services, LLC, All Rights Reserved. Voys and Voys logs are registered tracements of Voys Services Company.	

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
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.
------------------------	---

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	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.
	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 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.

FIDIANCIAL	Voya PayCloud	Help E
Voya PayCloud Home > Participant Update Search Parti	cipant > Participant Update Participant Information > Additional Information > Contribution Ele	ctions
ABC INDUSTRIES - 551213		
Update Participants Contribution Elections		
Contribution Elections		
EE PRE TAX	ROTH	
Percent • 50.00 %	Percent • 20.00 %	
Investment Elections Across ALL Sources Elections (Same as source	EE PRE TAX)	
< Back	Concel	
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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:

und Name	Percentage
/oya Fixed Account (4062)	100 %
otal	100%

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

FINANCIAL	Voya PayCloud Help
Voya PayCloud Home > Participant Update Search Participant > Part	icipant Update Participant Information > Additional Information > Contribution Elections > Investment Elections
ABC INDUSTRIES - 551213	
Please see below your current Investment Elections. To view the fu	III Investment name, hover over the Fund Name.
	Search by: Select Search C
Fund Name 🖤	Across ALL Sources
American Funds Nw 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%
Nouhara Borm Boal Ert End DC	A
Total	100 %

Fields

Field	Description
Fund amounts	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.
	Continue until the Total field equals 100. These investments will be made across all sources of money

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 Updat	e Investment Elections	s screen – Default	Enrollment
-------------------	------------------------	--------------------	------------

Voya PayCloud	Help Exit
pant Information > Additional Information > Contribution Elections > Investment Elections	
g fund based on the plan's default investment selection.	
voliment investment selection, please contact your Plan Manager.	
Cancel Continue	
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Click here for supported browsers	
2	
	ipant Information > Additional Information > Contribution Elections > Investment Elections ag fund based on the plan's default investment selection. replicent investment selection, please contact your Plan Manager. Cancel Centerol Cancel Centerol Control Centerol Control Control

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

FINANCIAL	Voya Payo	Joud	Help
Voya PayCloud Home > Participant Update Search > Verify Information	Participant > Participant Update Participant Informatio	n > Additional Information > Contribution Election	s > Investment Elections
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	Social Security Num 423093770	ber
	TULSA, OK 73001 USA		
Date of Birth 11/19/1987	Date of Hire 10/09/2018	Status 00-Active And Eligil	ble
Termination Date 12/12/2018	Termination Reason Voluntary Termination		
Termination Date 12/12/2018	E Mail Address test@gmail.com		
Contribution Elections Source	Туре	Amount	
EE PRE TAX ROTH	%	50.00 20.00	
Catch-Up Contribution Elections Source ROTH	Type %	Amount 0.00	
Back	Cancel	Edit	
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Participant Update Verify Information Screen – Default Enrollment

FINANCIAL	Voya P	ayCloud		Help E
Voya PayCloud Home > Participant Update Search F > Verify Information	Participant > Participant Update Participant Info	mation > Additional Information >	Contribution Elections > Investment Elect	lons
ABC INDUSTRIES - 551213				
Please verify the following information and press	SUBMIT to complete the operation (you may ne	ed to scroll down to view the enti	re page).	
Participant Name YICKY ALMAN-DP	Participant Address 2213 B		Social Security Number 423093770	
	TULSA, OK 73001 USA			
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 EE PRE TAX ROTH	Type %	Amount 50.00 20.00		
Catch-Up Contribution Elections Source ROTH	Type %	Amount 0.00		
< Back	Cancel	Edit		
	© 2021 Voya Institutional Plan Se Voya and Voya logo are registered tra			
	Click here for sup			

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.

		•	Print
03:58.			
Participant Address 2213 B		Social Security Number 423093770	
TULSA, OK 73001 USA			
Date of Hire 10/09/2018		Status 00-Active And Eligible	
Termination Reason Voluntary Termination			
E Mail Address test@gmail.com			
%	20.00		
Туре	Amount		
%	0.00		
Go То Но	тераде		
Voya and Voya logo are registered trademarks o	f Voya Services Company.		
	2213 B TULSA, OK 73001 USA Date of Hire 10/09/2018 Termination Reason Voluntary Termination E Mail Address test@gmail.com Type % % Type % %	Participant Address 2213 B TULSA, OK 73001 USA Date of Hire 10/09/2018 Termination Reason Voluntary Termination E Mail Address test@gmail.com Type Amount % 5000 % 20.00	Participant Address Social Security Number 423093770 TULSA, OK 73001 USA Status Date of Hire 10/09/2018 OO-Active And Eligible Termination Reason Voluntary Termination OO-Active And Eligible E Mail Address test@gmail.com Voluntary Termination Type Amount % % 20.00 % 0.00

Participant Update Confirmation screen – No Default Enrollment

Participant Update Confirmation screen – Default Enrollment

VO YANGAL	Voya PayCl	oud	Help E
Voya PayCloud Home > Participant Update Confirmation			
ABC INDUSTRIES - 551213			
Participant successfully updated.			😝 Print
This participant update was submitted on 11/10/2021 at 0	6:03:58.		
Participant Name YICKY ALMAN-DP	Participant Address 2213 B	Social Se 4230937	curity Number 70
	TULSA, OK 73001 USA		
Date of Birth 11/19/1987	Date of Hire 10/09/2018	Status 00-Active	e 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	Туре	Amount	
EE PRE TAX ROTH	% %	50.00 20.00	
Catch-Up Contribution Elections Source ROTH	Type %	Amount 0.00	
	Со То Но		
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	Click here for supported b		

Screen Options

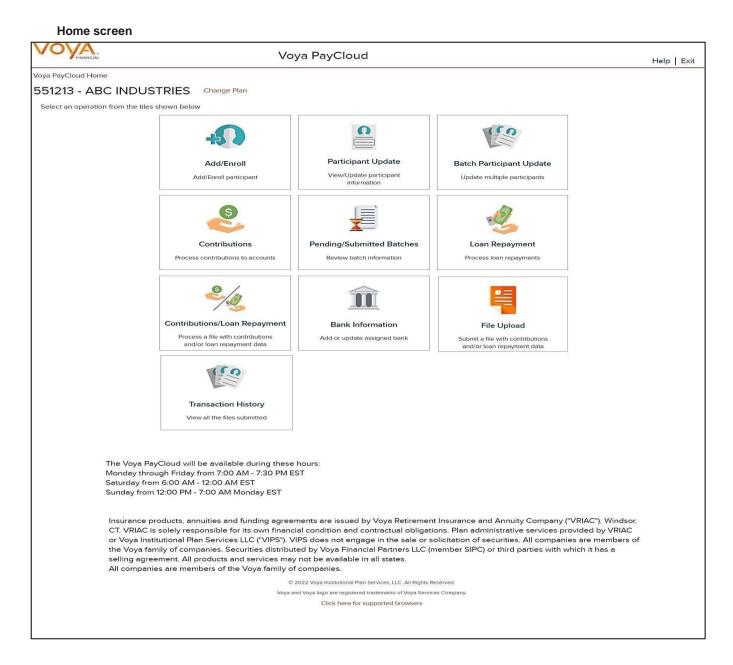
Click Print to print a copy of the confirmation screen • Click Go to Homepage to go to the Home screen

•

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.



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.

VOYA	Voya PayCloud	Help Exit
Voya PayCloud Home > Batch Participant Import		
ABC INDUSTRIES - 551213		
To do a Batch Participant Update, 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 Batch participant update manual I will manually enter the participant data.	y .	
i will manually enter the participant data.		
< Back	Continue	
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	Click here for supported browsers	

Batch Participant Update _ Import File screen

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

VOYA.	Voya PayCloud	Help
Voya PayCloud Home > Batch Participant Import		
ABC INDUSTRIES - 551213		
To do a Batch Participant Update, would you like to u	pload a file containing participant data?	
Upload a file I have a file with participant(s) data that I would like to Upload a file with participant(s) data that I would like to Upload a file	o import.	
Process Batch participant update manually I will manually enter the participant data.		
Select a File		
	Browse	
View Sample File for formatting instruction	5	
< Back		
< Back		
< Back	© 2021 Voya Institutional Plan Services, LLC, All Rights Reserved.	

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

VOYA.	Voya PayCloud	Help Exit
Voya PayCloud Home > Batch Participant Import > Templates		
ABC INDUSTRIES - 551213		
You can select an existing template or create a new one by sel been added to the selected template to ensure detail will impo	ecting from the options below. If you use an existing template, please verify that any new o nt correctly.	columns added to your file have also
Please be advised that Division/Location column is required. Existing Template	ſ	
Select	Go Create New Template	
Delete		
	1.	
<u>.</u>		
< Back		
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	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 > Bach Participant Import > Templates > Create Template ABC INDUSTRIES - 551213 Create a new template New Template Name Prom too to bottom, how many rows would you like to remove: Headers No reaters No valies to remove: Headers No valies to remove: No vali		YA.				Voy	a Pay	Cloud					Hel
Create a new template	Voya PayC	loud Home > Batch P	srticipant imp	oort > Templates >	Create Te	mplate							
 New Template Name Form top to bottom, how many rows would you like to remove. Headers vould vou like to remove. No Headers vould vou like to remove. No we select each column title Select an appropriate heading from the dropdown list for each column. To bypass a column, select Not Applicable. 	ABC IN	NDUSTRIES -	551213	3									
From top to bottom, how many rows would you like to remove. Headers Tailers No Headers I allers No Trailers I allers No Beaders I allers	Create a	new template											
you like to remove. Headers Tailers No Headers To Trailers No Headers No Trailers Now select each column title: Select an appropriate heading from the dropdown list for each column. To bypass a column, select Not Applicable. Image: Column 1 Column 2 Column 1 Column 2 Column 3 Column 4 Column 5 Column 6 1 SSN Last Name First Name A B First Name ADOR 1 ADOR 2 City 2 415-40.9607 Lisa Haydon 187:596-265 LN Fn 12 Last Name First Name ADOR 1 ADOR 2 City Vatican 3 187:596-265 LN Fn Eack Cancel Sinve Aud Combine Sinve Template Sinve Template	1	New Template Na	me										
No Headers No Trailers 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 L2 1212 OK	0		how many ro	ows would	3			any rows would					
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 Lise Haydon 1113 B Vatican 3 187-596-265 LN Fn 12 1212 OK		Headers				Tratlers							
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 ADOR 1 ADDR 2 City 2 415:40.9607 Lite Haydon 1113 B Vatican 3 187:596:265 LN Fn 12 1212 OK		No Headers		-	0	No Tratlers			- 0				
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	1				st for each		a column,		ble.	E		F	
2 415-40.9607 Lise Haydon 1113 B Valuen 3 187-596-265 LN Fn 12 1212 OK				Column 2		Column 3				-	-	Column 6	
3 187-596-265 LN Fn 12 1212 OK Image: Cancel Sinve And Combinue Sinve Template Sinve Template Sinve Template		Column 1				Constraints		Column 4		Column 5		CONTRACTOR OF THE OWNER	
Cancel Sinve And Combinue Sinve Template				N. Secondaria		- And Contraction		A street character		- Certanour		and the second	
		1 SSN		Last Name		First Name		ADDR 1	•	- Certanour		City	
		1 SSN 2 415-40-9607		Last Name Lisa		First Name Haydon		ADDR 1 1113 B		ADDR 2		City Vatican	
© 2021 Veys Institutional Plan Services, LLC, All Rights Reserved.		1 SSN 2 415-40-9607		Last Name Lisa		First Name Haydon		ADDR 1 1113 B		ADDR 2		City Vatican	
		1 SSN 2 415-40-9607 3 187-596-265		Last Name Lisa	Cancel	First Name Haydon Fn		ADDR 1 1113 B 12		ADDR 2 1212		City Vatican	
Veys and Veys lage are registered trademarks of Veys Services Company. Click here for supported browsers		1 SSN 2 415-40-9607 3 187-596-265		Last Name Lisa	10410	First Name Haydon Fn Sinve A	nd Continue	ADDR 1 1113 B 12	e Templats	ADDR 2 1212		City Vatican	

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

	FINANCIAL				123		Cloud					He
	Cloud Home > Batch Partic			Create Te	emplate							
ABCI	NDUSTRIES - 5	51213	3									
Create a	a new template											
1	New Template Name											
-	From too to bottom, how many rows would											
2	From top to bottom, how many rows would you like to remove.			3	From bottom to t you like to remov		any rows would					
	you like to remove. Headers				Trailers							
	No Headers			0	No Trailers			. 0				
	Select an appropriate hea	ading from	m the dropdown	list for eac	h column. To bypass	a column	select Not Applic	able.				
	Select an appropriate hea	ading froi	m the dropdown	list for eac	h column. To bypass C	a column	select Not Applic	able.	E		F	
	0.52	ading from		list for eac		a column		able. •	E Column 5		F Column 6	
	A Column 1 Column 1	13	В		с		D					
	A Column 1 1 Column 1 Last Name	13	B Column 2		C. Column 3		D Column 4		Column 5	3	Column 6	
	A Column 1 1 Column 1 Last Name First Name	13	B Column 2 Last Name		C Column 3 First Name		D Column 4 ADDR 1		Column 5		Column 6 City	
	A Column 1 1 Column 1 Last Name 3 First Name Middle Initial	*	B Column 2 Last Name Lisa		C Column 3 First Name Haydon		D Column 4 ADDR 1 1113 B		Column 5 ADDR 2	٠	Column 6 City Vatican	
	A Column 1 1 Column 1 Last Name First Name	*	B Column 2 Last Name Lisa		C Column 3 First Name Haydon		D Column 4 ADDR 1 1113 B		Column 5 ADDR 2	•	Column 6 City Vatican	
	A Column 1 Last Name First Name Middle Initial Social Security N	*	B Column 2 Last Name Lisa	-	C Column 3 First Name Haydon Fn	•	D Column 4 ADDR 1 1113 B 12	•	Column 5 ADDR 2 1212		Column 6 City Vatican	
	A Column 1 1 Column 1 Last Name 3 First Name Middle Initial	*	B Column 2 Last Name Lisa		C Column 3 First Name Haydon Fn		D Column 4 ADDR 1 1113 B 12		Column 5 ADDR 2 1212	•	Column 6 City Vatican	
	A Column 1 Last Name First Name Middle Initial Social Security N	*	B Column 2 Last Name Lisa	Cancel	C Column 3 First Name Haydon Fn	and Continue	D Column 4 ADDR 1 113 B 12 Set LLC. All Rights Reserve	• re Template d.	Column 5 ADDR 2 1212		Column 6 City Vatican	

Field

S

Field	Description
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 header fields 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."

these trailer fields will be ignored.
estion icon, the following text will display within
L

	"Select the number of trailers contained in the import file. Options include "No Trailers" (default), and the values 1-9. Wher the file is imported, these trailer fields will be ignored."
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 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 E
Voya PayCloud Home > Batch Par	rticipant Import > Templates > Test Te	mplate 3 Template	
ABC INDUSTRIES -	551213		
Existing Template			
Test Template 3			
-			
2 From top to bottom, how you like to remove	w many rows would		
you like to remove.		you like to remove.	
Headers No Headers	- 0	Trailers VO	
	• 0	No Trailers 🔹 🧭	
Now select each column			
Select	Starting Posi		Add Field
Field Name	Starting Position	Field Length	
Social Security Number	1	9 Edit / Delete	
Update Data			
Uploaded Data			
Social Security Number	Zip Code		
696665555	0002		
507152275	0002		
254354354	0001		
684773590	0001		
382833864	0001		
657696288	0001		-
< Back	Cance	Save Template	

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

oya PayClo	ud Home > Batch Participant Imp	p <mark>ort > Templates > T</mark> est Temp	alate 10 Template			
BC IN	DUSTRIES - 551213	3				
	Existing Template					
1	Test Template 10					
U y	rom top to bottom, how many ro ou like to remove.	•	From bottom to top, how r you like to remove.	nany rows would		
ł	leaders	- 0	Trailers No Trailers	- 0		
т	nis template can be modified by	selecting a new heading from	m the drop down list. To bypa	ass a column, select Not App	licable.	
т	nis template can be modified by	selecting a new heading from	m the drop down list. To bypa	ass a column, select Not App D	E	
T					1995-1990-22	
Т	A Social Security Number *	B	c	D	E	
	A Social Security Number * SSN	B Not Applicable	C Not Applicable	D Address Line1	E Address Line2 👻	
1	A Social Security Number * SSN 013-45-9998	B Not Applicable * ROLLOVER	C Not Applicable ~ EE PRETAX	D Address Line1 ~ ER PROFIT	E Address Line2 Thirloc	
1	A Social Security Number * SSN 013-45-9998 313-43-7023	B Not Applicable * ROLLOVER 20.00	C Not Applicable * EE PRETAX 4.00	D Address Line1 * ER PROFIT 1700	E Address Line2 * Div/Loc 1006	

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."

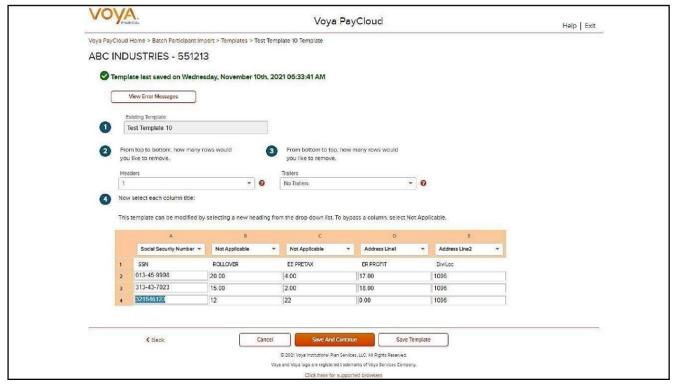
Screen Options

- 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



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

rrors		😝 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.

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.

VOYA.			Voya PayC	loud		Help Ex
Voya PayCloud Home > B	atch Participant Import > "	Templates > NewT1BPU Template	> Verify Information			
ABC INDUSTRI	ES - 551213					
Please verify the following	ng information					
NOTE that the operation	will not be completed ur	ntil 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", th	is information will be sub	mitted with no further changes al	lowed. Select Back to	return to the previous page.		þ
	< Back		Cancel	Submit		
			o are registered trademarks			

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]

FINANCIAL	Voya PayCloud	Help Exit
Voya PayCloud Home > Batch Particip	ant Import > Field Selection	
ABC INDUSTRIES - 5	51213	
The following fields (unless otherwise available for updates.	indicated) are available for updates by enabling the checkbox. Note that the field marked inquiry only are disp	ayed for your convenience and are not
NAME		
ADDRESS		
EMPLOYEE STATUS (Inquiry	2nly)	
DATE OF BIRTH		
DATE OF HIRE		
ALT VEST DATE (Inquiry Only		
PAYROLL FREQUENCY (Inqu	ry Only)	
REHIRE DATE (Inquiry Only)		
K Back	Cancel	
	O 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	

- 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

Voya PayCloud Home > Batch	n Participant Import	> Field Selection > Batch	Participant Update			
ABC INDUSTRIE	ES - 551213					
Select Division/Location						
0001 HARDWOODS SPECIA	LTY PRODUCTS	(*)				
Display Active Participa	ants Only					
 Display All 						
Done						
				Search by: Select	• Search	Q
	SSN 🔻	First Name 👻	Last Name 👻	Mi 🗸	Address Line1 👻	Address Line2 👻
Name 🔻		TECTNIC II	LAST_NAME U	U	100 MAIN ST	100 MAIN ST1
LAST_NAME U, TESTING	012686501	TESTING_U	Dest_reame o	0	IOU MAIN ST	IOU MAIN STT
	012686501 014480274	HAMILTON	BARNETT-DPIWE	QWEQ	801 JEFFERSON AVEa1	a2 UPDATE
LAST_NAME U, TESTING						
LAST_NAME U, TESTING BARNETT-DPIWE, HAMILT	014480274	HAMILTON	BARNETT-DPIWE	QWE Q	801 JEFFERSON AVEa1	a2 UPDATE
LAST_NAME U, TESTING BARNETT-DPIWE, HAMILT HELDT-DP, RON QWE F	014480274 021674040	HAMILTON RON	BARNETT-DPIWE HELDT-DP	QWE Q QWE F	801 JEFFERSON AVEa1 3305 S 500 E	a2 UPDATE 0.00
LAST_NAME U, TESTING BARNETT-DPIWE, HAMILT HELDT-DP, RON QWE F GOTCHER-DP1, ROBBIE Q	014480274 021674040 026655190	HAMILTON RON ROBBIE	BARNETT-DPIWE HELDT-DP GOTCHER-DP1	QWE Q QWE F	801 JEFFERSON AVEa1 3305 S 500 E 501 NORCROSS LN	a2 UPDATE 0.00 0.00 0.00
LAST_NAME U, TESTING BARNETT-DPIWE, HAMILT HELDT-DP, RON GWE F GOTCHER DP1, ROBBIE Q PARAS-DP, JUNIORGEWWE	014480274 021674040 026655190 027657203 028837868	HAMILTON RON ROBBIE JUNIORGEWWE	BARNETT-DPIWE HELDT-DP GOTCHER-DP1 PARAS-DP	GWE Q GWE F GWE F	801 JEFFERSON AVEa1 3305 S 500 E 501 NORCROSS LN	a2 UPDATE 0.00 0.00
LAST_NAME U, TESTING BARNETT-DPIWE, HAMILT HELDT-DP, RON GWE F GOTCHER DPI, ROBBIE Q PARAS-DP, JUNIORGEWWE BONELLI-DP, BUCK	014480274 021674040 026655190 027657203 028837868	HAMILTON RON ROBBIE JUNIORGEWWE	BARNETT-DPIWE HELDT-DP GOTCHER-DP1 PARAS-DP	GWE Q GWE F GWE F	801 JEFFERSON AVEa1 3305 S 500 E 501 NORCROSS LN	a2 UPDATE 0.00 0.00 0.00
LAST_NAME U, TESTING BARNETT-DPIWE, HAMILT HELDT-DP, RON GWE F GOTCHER-DP1, ROBBIE O PARAS-DP. JUNIOROEWWE BONELLI-DP, BUCK By clicking on a participant's r	014480274 021674040 026655190 027657203 028837868	HAMILTON RON ROBBIE JUNIORGEWWE	BARNETT-DPIWE HELDT-DP GOTCHER-DP1 PARAS-DP	GWE Q GWE F GWE F	801 JEFFERSON AVEa1 3305 S 500 E 501 NORCROSS LN	a2 UPDATE 0.00 0.00 0.00

Batch Participant Update screen

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

VOYA.	Voya PayCloud	Help Exit
Voya PayCloud Home > Batch Participant Confirmation		
ABC INDUSTRIES - 551213		
	e	Print
Your batch has been successfully updated.		
0 participant has been updated on to the recordkeeping system.		
	Go To Homepage	
	nstitutional Plan Services, LLC: All Rights Reserved.	
	o are regitered trademarks of Voya Services Company. Itck here for supported browsers	
	en noro orizangou son oronzola.	

Screen Options

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

Contributio ns

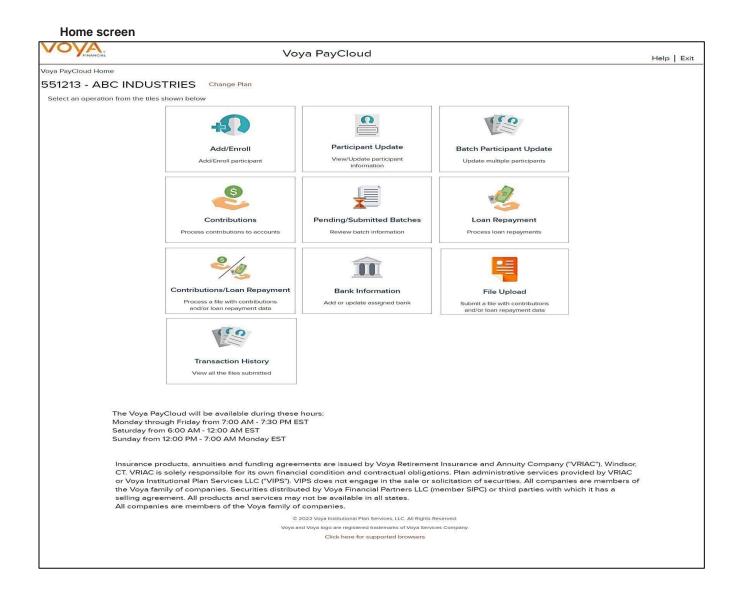
Overview

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.



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.		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 I	Date.			
Payroll date is used to clarify Current vs. Prior Year contrib	outions as it applies	to the IRS Limits.		
Batch Name	0	Payroll Date (MM/DD/YYYY)		
Prefunded Account Contribution	What's	This?		
O Participant Account Contribution				
from an existing batch, the default sources will copied. If you need to add or delete sources fro sources as applicable.				
Available Sources to Include in Batch				
EE PRE TAX				
ROTH ROLL				
ROLLOVER				
ROTH				
TAKEOVER				
SH MATCH				
K Back		Continue		
		© 2021 Voya Institutional Plan Services, LLC. All Rights R	leserved.	
	Ŵ	oya and Voya logo are registered trademarks of Voya Servic		
		Click here for supported browsers		

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

VOVANCIAL		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	e.		
Payroll date is used to clarify Current vs. Prior Year contributi		t applies to the IRS Limits.	
Batch Name		Payroll Date	
batch name	0	07/06/2022	
Prefunded Account Contribution	Wha	t's This?	
Participant Account Contribution			
Display Active Participants Only			
 Display All 			
Would you like to upload a file containing participant data	ta?		
 Upload a file I have a file with participant(s) data that I would like to imprive the set of the	ort.		
 Process contributions manually I will manually enter the participant data. 			
Select a file			
	rowse.	·]	
View Sample File for formatting instructions			
< Back		Continue	
		© 2022 Voya Institutional Plan Services, LLC. All Rights Reserved.	
		Voya and Voya logo are registered trademarks of Voya Services Company.	
		Click here for supported browsers	

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

VOYA.	Voya PayCloud	Help Exit
Voya PayCloud Home > Contributions		
ABC INDUSTRIES - 551213		
To process contributions to accounts:		
Please give this batch a name and enter Payroli date is used to clarify Current vs. Prior	a Payroll Date. lear contributions as it applies to the IRS Limits.	
Batch Name	Payroll Date (MM/DD/YYYY)	
O Prefunded Account Contribution	What's This?	
Participant Account Contribution		
Display Active Participants Only		
O Display All		
Would you like to upload a file containing p	articipant data?	
O Upload a file I have a file with participant(s) data that I wo	Id like to Import.	
Process contributions manually I will manually enter the participant data.		
Display Participants With Contribution	5	
Copy Payroll Data From Select	•	
The following sources are available to be i from an existing batch, the default sources copied. If you need to add or delete source sources as applicable.	will be populated based on the batch	
Available Sources to Include in Batch		
EE PRE TAX		
ROTH ROLL		
ROLLOVER		
ROTH		
TAKEOVER		
SH MATCH		
	Continue	
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	Voya and Voya logo are registered trademarks of Voya Services Company.	
	Click here for supported browsers	

Field

S

Field	Description
Batch Name	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.
	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."

Payroll Date	Select the dates using the calendar icon. Payroll dates for the following yea (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.

Prefunded Account Contribution	Select this option to contribute to the Prefunded Account through the contribution batch
	Note : This option will display depending on the plan settings
	Clicking on the 'What's this?' link will open the Prefunded Account Guide in a new window
Participant Account Contribution	Select this option to contribute to the Participant Account through the contribution batch
Display Active Participants Only	Select this option to include only active participants in the contribution batch. This is selected by default
	Note: This option is available for selection only for Participant Account Contribution
Display Active and Ineligible Participants Only	Select this option to include participants which are either in an active status or ineligible status in the contribution batch
	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."
	Note: This option is available for selection (depending on plan settings) only for Participant Account Contribution
Display All Participants	Select this option to include all participants in the contribution batch
	Note: This option is available for selection only for Participant Account Contribution
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 Participants with Contributions	Filters for only the active plan participants that have made contributions (optional). This does not include active participants that have not contributed. 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
Copy Payroll Data From	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). 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
Source Selection	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.

- 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

VOYA	Voya PayCloud	Help Exit
Voya PayCloud Home > Contributions		
ABC INDUSTRIES - 551213		
To process contributions to accounts:		
Please give this batch a name and ent Payroli date is used to clarify Current vs. Pri	er a Payroll Date. r Year contributions as it applies to the IRS Limits.	
Batch Name	Payroll Date (MM/DD/YYYY)	
 Prefunded Account Contribution Participant Account Contribution Display Active Participants Only 	Whets This?	
O Display All Would you like to upload a file containing O Upload a file	participant data?	
These a file with participanty; data that i Process contributions manually I will manually enter the participant data. Select a file	Browse	
View Sample File for formatting inst		
< Back	Continue	
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	Voya and Voya logo are registered trademarks of Voya Services Company.	

Fields

Field	Description
Batch Name	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.
	Click on question icon 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."
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.
	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.

Participan t Account Contributi on	Select this option to contribute to the Participant Account through the contribution batch
Display Active Participan ts Only	Select this option to include only active participants in the contribution batch. By default this will be selected Note: This option is available for selection only when Participant Account Contribution is chosen
Display Active and Ineligible	Select this option to include participants which are either in an active status or ineligible status in the contribution batch
Participan ts Only	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."
	Note: This option is available for selection (depending on plan settings) only when Participant Account Contribution is chosen
Display All Participan ts	Select this option to include all participants in the contribution batch
	Note: This option is available for selection only when Participant Account Contribution is chosen

- 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

FINANCIAL	Voya PayCloud	Help E
Voya PayCloud Home > Contributions > Templates		
ABC INDUSTRIES - 551213		
You can select an existing template or create a new one been added to the selected template to ensure detail wi	by selecting from the options below. If you use an existing template, please verify that an II import correctly.	y new columns added to your file have also
Please be advised that Division/Location column is requi	ired.	
Existing Template		
Select	Go Create New Template	
Delete		
×		
< Back		

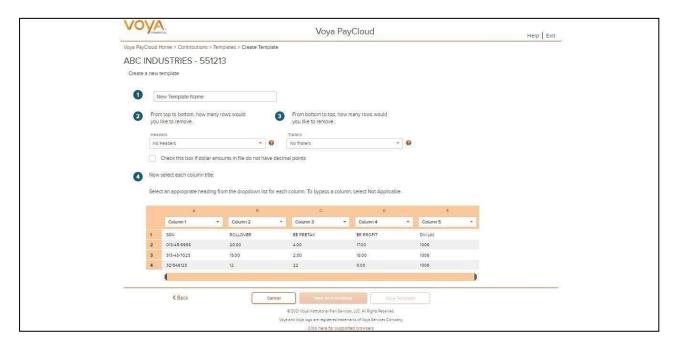
- Select an existing template from the list of saved templates using the drop down.
 o Click Go after selecting a template to go to the Existing Template screen o Click Delete to delete the selected template
- Click Create New Template to go to the Create Template screen Click Back to go to the Contributions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



Fields

Field	Description	
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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 header fields 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 popup.
	"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?	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.
	Upon clicking the question icon, the following text will display within a popup.
	"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."
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 .

- 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			Voya PayCloud		Help Ex
Voya PayCloud Home > Contrib	utions > Templates > New	template Templ	ate		27.3
ABC INDUSTRIES	- 551213				
Create new template					
Existing Template New template					
- New template					
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No Headers		- 0	No Trailers	- 0	
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Field Name	Starting	Position Fie	ld Length	ngth	
Field Name Social Security Number	Starting	Position Fie	d Length Ecit i Deveta Ecit i Deveta	gh	
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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

Waye PayCloud Home > Contributions > Templates > New template Template ABC INDUSTRIES - 551213 intring Template Image: Template I				Voya PayCloud		Help Exit
Setting Template Prom top to bottom, how many rows would From bottom to top, how many rows would you like to remove. Tenters Not seters Tenters Not seters The readers Tenters Not seters To heck this box if dollar amounts in file do not have decimal points Not seters fields Field Type Seters Field Length: Add Field Update Data Update Data Seters Explored Data Explored Data Seters Explored Data Explored Data Seters Explored Data Explored Data Seters </th <th>Voya PayCloud Home > Contribu</th> <th>utions > Templates > New ten</th> <th>nplate Ter</th> <th>nplate</th> <th></th> <th></th>	Voya PayCloud Home > Contribu	utions > Templates > New ten	nplate Ter	nplate		
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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

	A.			voya	PayCloud				Help Exit
Voya PayClos	id Home > Contributions > Terr	iplates > ContTest	Template						
ABC IN	DUSTRIES - 55121	3							
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11 2 3	ow select each column title: Its template can be modified by A Social Security Number ~ 52% 015-35-4998 213-43-7023	ROLLOVER 20:00 15:00	eading fro	The drop down list. To C EE PRE TAX EE PRETAX 400 2.00	Not Applicable ER PRONT 1000 000		E Column 5 Div:Loc 1006 1006		

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

	INAL CIT			Voya F	PayCloud				Help Exit
Voya PayCl	oud Home > Contributions >	Templates > ContTest	Template						
ABC IN	DUSTRIES - 55	213							
•									
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- 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

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

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

Ways 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. Bitch Name Payroll Dire TestBatch 11/01/2021 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. Nem # SN # EL PRE TAX # ROLLINER # ROLLINER # SN # HMATCH # P 999991001 000 000 000 000 000 000	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 Paycol Date TestBatch 11/01/2021 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 w ELIPIE TAX w ROLLOVER w ROLLOVER w TaxEDVER w SH MATCH w	Penancial.				Vo	ya PayClou	d			Help Ex
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Contributions Payroll Input screen – Participant Account Contribution

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ABC INDUSTRIES -	551213									
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BACKER-DP, FRANKLYN	879787628	01-Active; Awaits Suspension		1	0.00	0.00	0.00			
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BARON-DP, ORLANDO	410502238	01-Active; Awaits 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	828136250	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			
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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

FINANCIAL			10)	a PayClou	4			1	Help
vCloud Home > Contributions	> Payroll				₽.				
INDUSTRIES - 55	51213				1				
INDUSTRIES - J.	51215								
batch is ready for processing.	Please be advise	ed, the order of the s	ource columns may	have changed. E	nter data into the ap	propriate columns.			
atch Name									
			oll Date						
35		10/0	01/2021						
Please note: If you are required submitted and finished.	to update partici	pant Current Period H	fours with your cont	ributions, the Hou	irs will only update on Search by:		 Search 	batch has be	en ful
Nome w	SSN 🗢	Period Comp 🖤	Divison/ 🛩 Location	Mos Svc 🖤	Number Of 🗢 Hours	Number Of w Hours	Elig Hrs Anniv 🗢	1.	
4	****9607	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	
ANGUIANO-OP, TRINA	×××××5379	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	
	xxxxx9476	0.00	1005	4	0.00	0.00	0.00	1.629.00	
ANSELMO-OP. AMBROSE		0.00	1005	1	0.00	0.00	0.00	1.629.00	
ANSELMO-OP. AMBROSE ARCHAMBAULT-DP.CLEMENT	xxxx7859	0.00	1000					1,131.00	
	xxxx7859 xxxx75799	0.00	1005	1	0.00	0.00	0.00	1	
ARCHAMBAULT-DP.CLEMENT					0.00	0.00	0.00	1.578.00	
ARCHAMBAULT-DP.CLEMENT	xxxxx5799	0.00	1005	1					
ARCHAMBAULT-DP.CLEMENT ARDOIN-DP. CHI BARCO-DP. HOPE	xxxxx5799 xxxxx5926	0.00	1005 1005	1 5	0.00	0.00	0.00	1.578.00	
ARCHAMBAULT-DP.CLEMENT ARDOIN-DP. CHI BARCO-DP. HOPE BARKSDALE-DP. KYONG	xxxx5799 xxxxx5926 xxxxx2315	0.00 0.00 0.00	1005 1005 1005	1 5 8	0.00	0.00	0.00	1,578.00	>
ARCHAMBAULT-DP.CLEMENT ARDOIN-DP. CHI BARCO-DP. HOPE BARKSDALE-DP. KYONG	xxxx5799 xxxxx5926 xxxxx2315	0.00 0.00 0.00	1005 1005 1005	1 5 8	0.00	0.00	0.00	1.578.00	D
ARCHAMBAULT-DP.CLEMENT ARDOIN-DP.CH BARKODE.OP.HOPE BARKSDALE-OP.KYONG BEETS-DP.FAULINE BEGLEY-DP.GINO Total By clicking on a participant's na	xxxxx5799 xxxxx5926 xxxxx2315 xxxxx5582 xxxxx5582 xxxxx2896 ame, you can link	0.00 0.00 0.00 C	1005 1005 1005 1005	1 5 8 1	0.00	0.00	0.00	1,578.00	>
ARCHAMBAULT-DP.CLEMENT ARDON-DP. CHI BARCO-DP. HOPE BARKSDALE-DP. KYONG BEETS-DP. PAULINE BEELEY-DP. GINO	xxxxx5799 xxxxx5926 xxxxx2315 xxxxx5582 xxxxx5582 xxxxx2896 ame, you can link	0.00 0.00 0.00 0.00 <	1005 1005 1005 1005	1 5 8 1	0.00	0.00	0.00	1,578.00	>
ARCHAMBAULT-DP.CLEMENT ARDOIN-DP.CH BARKSOLE-OP.HOPE BARKSOLE-OP.KYONG BETS-DP.PAULINE BEGLEY-DP. GINO Total By clicking on a participant's na	xxxxx5799 xxxxx5926 xxxxx2315 xxxxx5582 xxxxx5582 xxxxx2396 ame, you can link ate Location	0.00 0.00 0.00 C	1005 1005 1005 1005	1 5 8 1	0.00 0.00 0.00	0.00	0.00	1,578.00	>

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

FINANCIAL		Voy	/a PayCloud		Help E
ya PayCloud Home > Contrib	utions > Payroll > Add Participant	to Batch			
BC INDUSTRIES	- 551213				
			ed to submit contributions for a participant multiple divisions/locations, you may add		
f you had previously added a	participant to your batch, they wil	I be displayed below and y	ou may delete them at any time.		
o add a participant, locate th	em via the search tool below and	click 'Add'.			
1 Select the Div Sub to a	pply funding to.				
Select Division/Location	to Apply Funding to SSN				
0001 HARDWOODS SPI	ECIALTY PRODUCTS				
If the participant has tra	nsferred to your division/location an	d the division/location has no	t yet been updated, please contact the current	division/location:	
Division/Location : 999					
2 Search By Search By SSN 3 Search Participant by	* / SSN	Search			
Social Security Number	Participant Name 🖤		Added Participants		
123-45-6799	TEST, TEST ASD T	Add	TEST, TEST ASD	123456799 0001	Remove
999-99-0002	TAKEOVER 2	Add	TAKEOVER, 3	999990003 0001	Remove
999-99-0003	TAKEOVER 3	Add	IAKEOVER, 3	333330003 0001	Remove
999-99-0004	TAKEOVER 4, FN 4	Add			
		_	DONE		
		C 20213/aug (peter diago			
		w 2021 voya institutiona	Plan Services, LLC. All Rights Reserved.		

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)

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

FINANCIAL			voy	a PayCloud					Help E
Voya PayCloud Home > Pe	nding/Submitted Ba	tches							
ABC INDUSTR	IES - 55121	3							
Please select Batch Typ	9								
Your contributions	batch file has bee	en added to the	list of pending batches b	elow.					
Batch Type									
Pending Batches									
					arch by: Select	•	Search		Q
Batch Name 🐨	Batch Type 🐨	Payroll Date 🖤	Status 🗢	Scheduled Date 🌳	Division/ Location 🔫	EE	PRE TAX 🛩		
 testbatchtoday 	Contributions	2021-11-14-1	E- Ready to Post		0001HARDWOODS 1	P. 6.	00	Edit Print Delete	
 AutCont Test 	Contributions	2021-11-11-5	B- Ready to Post		0001 HARDWOODS	P_ 4	00	Edit i Print i Delete	
AutCont Test	Contributions	2021-11-11-3	B. Ready to Post		0001 HARDWOODS S	P_ 4	00	Edit I Print i Delete	
O AutCost Test	Contributions	2021-11-11-2	- Ready to Post		0001HARDWOODS	P. 4	00	Edit i Print i Delete	
 AutCont Test 	Contributions	2021-11-11-1	E- Ready to Post		0001HARDWOODS S	P. 4/	00	Edit (Print) Delete	
AutCont Error	Contributions	2021-11-10-5	Ready to Post		DOOTHARDWOODS S	P. 10	•	Edit Print Delete	
O AutCont Error	Contributions	2021-11-10-4	Scheduled for Process	2021-11-11	DOD1HARDWOODS :	P_ 1.0	0	Edit i Print i Delete	
O AutCont Error	Contributions	2021-11-10-3	Scheduled for Process	2021-11-11	0001 HARDWOODS		0	Edit i Print i Delete	
AutCont Error	Contributions	2021-11-10-2	Contains Errors		0001 HARDWOODS S	P_ 2		Edit I Print I Delete	
 AutCont Error 	Contributions						•	Edit Print Delete	-
	Relation		_						
	< Back			Run Batch					
			2021 Voya Institutional P						

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

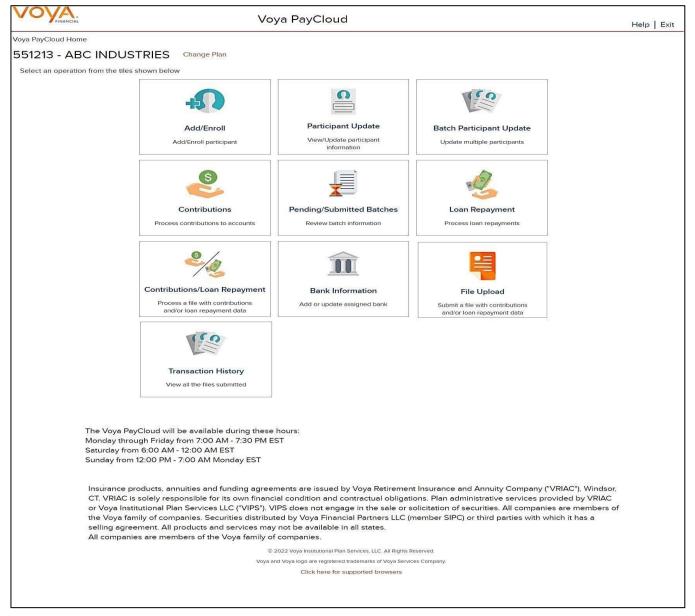
Batches with errors

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



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 > P	ending/Submitted Ra	tches	5					Help Ex
ABC INDUST	RIES - 551213	3						
Please select Batch Typ	e .							
Batch Type								
Pending Batches	*							
To submit your batch fo	r processing; (1) Sele	ct the circle to the	left of the batch name and (2	2) click the Run Ba	ch Button at the bottom of the	screen.		
				3	Search by: Select	- Search		Q
Batch Name 🗢	Batch Type 🐨	Payroll Date 🖤	Status 🐨	Scheduled Date 👻	Division/Location w	EE PRE TAX 🖤		
) testbatchtoday	Contributions	2021-11-14-1	Ready to Post		0001 HARDWOODS SP	6.00	Edit i Print i Delete	-
 AutCont Test 	Contributions	2021-11-11-5	- Ready to Post		0001 HARDWOODS SP.,	4.00	Edit Print Delete	
AutCont Test	Contributions	2021-11-11-3	B. Ready to Post		0001 HARDWOODS SP	4.00	Edit Print Delete	
AutCont Test	Contributions	2021-11-11-2	- Ready to Post		0001 HARDWOODS SP	4:00	Edit Print Delete	
AutCont Test	Contributions	2021-11-11-1	- Ready to Post		0001 HARDWOODS SP	4.00	Edit Print Delete	
AutCont Error	Contributions	2021-11-10-5	E Ready to Post		0001 HARDWOODS SP	1.00	Edit Print Delete	
AutCont Error	Contributions	2021-11-10-4	Scheduled for Process	2021-11-11	0001 HARDWOODS SP.	1.00	Edit Print Delete	
AutCont Error	Contributions	2021-11-10-3	Scheduled for Process	2021-11-11	0001 HARDWOODS SP	1.00	Edit Print Delete	
AutCont Error	Contributions	2021-11-10-2	A Contains Errors		0001 HARDWOODS SP	2.00	Edit Print Delete	
 AutCont Error 	Contributions	()	Edit Print Delete	-

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: • 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	 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.</sequence>
Status	Pending batches: 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 Ioan

- 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.		N	/oya PayCloud			Help Exit
Voya PayCloud Home > Pending/Su	Ibmitted Batches > Funding					
ABC INDUSTRIES -	551213					
Please be advised that sufficient to view the entire page.)	unds must be in your bank a	account before you subn	ilt funding. Please ensure all	I Information H	is correct and select FINISH to process. (You ma	r need to scroll
Batch Name testbatchtoday		Plan Number 551213			Plan Name ABC INDUSTRIES	
Payroll Date 11/14/2021		Payroll Sequence	Number		Usec1D kran11993d46b0	
Total Contribution 41.00		Total Loan Repay 0.00	ments		Total Funding Required for ACH/EFT 41.00	
Method Of Remitting P	und					
ACH Debit						
Bank Name JPMC		Account Number 789789789M		ABA Number 123456789		
🔾 Plan Will Initiate F	unding					
Submit Date Submit Now						
Schedule Date						
Please note that the A	vallable Forfeiture and Prefu	unded Account Balances	that are shown by money se	ource are as c	of the prior close of the NYSE.	
Account Name 🖤	Money Source Type 🔫	Available Account Balance	- Enter Offset Amount -			
		Batarice				
Forfeiture	ROTH ROLL	\$9,947.69	\$0.00			
Forfeiture Forfeiture	ROTH ROLL ROLLOVER		\$0.00 \$0.00			
		\$9,947.69				
Forfeiture	ROLLOVER	\$9,94769 \$9,773.29	\$0.00			
Porfeiture Forfeiture	ROLLOVER EE PRE TAX	\$9,94769 \$9,773.29 \$84,769,95	\$0.00 \$0.00 \$0.00			
Porfeiture Porfeiture Porfeiture Batches submitted su day. Will not be proces	ROLLOVER EE PRE TAX ROTH cccessfully on weekends and ssed until the following busin	\$9,94769 \$9,773.29 \$84,766.95 \$9,970.79 market holidays, or after ress day.	\$0.00 \$0.00 \$0.00 \$0.00	ald the market	close for trading prior to 4.00pm ET) on any bu Batches option to review your submissions.	Iness
Porteture Foreture Porteture Batches submitted su day. Will not be procet To avoid duplicate tra	ROLLOVER EE PRE TAX ROTH ccessfully on weekends and ssed until the following busin insactions please do not click	\$9,94769 \$9,773.29 \$84,766.95 \$9,970.79 market holidays, or after ress day.	\$0.00 \$0.00 \$0.00 r 4.00pm ET (or earlier, shou me. You may use the Pendin	ald the market		iness
Porfeiture Porfeiture Porfeiture Batches submitted su day. Will not be proces	ROLLOVER EE PRE TAX ROTH ccessfully on weekends and ssed until the following busin insactions please do not click	59,94769 59,773,59 594769,95 59,978,79 99,978,79 99,978,79 99,978,79 99,978,79 99,978,978 99,978,978 99,978,978 99,94769 99,94969 99,947699 99,9476	\$0.00 \$0.00 \$0.00 r 4:00pm ET (or earlier; shou me. You may use the Pendin	Id the market		ines:
Porteture Foreture Porteture Batches submitted su day. Will not be procet To avoid duplicate tra	ROLLOVER EE PRE TAX ROTH ccessfully on weekends and ssed until the following busin insactions please do not click	\$99,2769 \$9,773,29 \$9,775,29 \$9,975,79 market holidays, or after sess day. (Finish more than one to	\$0.00 \$0.00 \$0.00 r 4.00pm ET (or earlier, shou me. You may use the Pendin	Id the market		iness.

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 mark until the following business day.	et 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
Do you wish to continue ?	
	Cancel

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).

ou 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
quested to be withdrawn fro	om your account on the date entered. Investments will take place at the close of the stock market on that same date,
	ost status of the individual employees accounts remain in good order. Changes to the batch may be completed on-line until
	the scheduled transaction date. Any changes made to this batch will disable the scheduled date and require a new date to be
ntered.	
o you wish to continue ?	
you wish to continue ?	

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

Voya PayCloud User Guide

-	
100 1	igreed upon method other than ACH debit. The file will be posted based on the normal processing standards. Please not th different funding methods on the same business day, there may be a delay in the processing of the ACH fund files.
Please contact your plan manager	
Do you wish to continue ?	

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

VOYA.	Voya PayCloud	Help Exit
Voya PayCloud Home > Batch Submission Confirmation		
ABC INDUSTRIES - 551213		
Contributions Batch submitted successfully.	r	🖨 Print
Date/Time 11-12-2021 05:25:17		
Batch Name	Plan Number	Plan Name
testbatchtoday	551213	ABCINDUSTRIES
Payroll Date	Payroll Sequence Number	User ID
11-14-2021	1	krani1993d46b0
Total Contribution	Total Loan Repayments	Total Funding Required for ACH/EFT
41.00	0.00	41.00
Method Of Remitting Fund		
Bank Name	Account Number	ABA number
JPMC	789789789M	123456789
NOTE- Batch processing information		
ACH Debit- Submit now: Batches submitted successfu	ily on weekends and market holidays, or after 4:00	Opm ET (or earlier, should the market close for trading prior to 4:00pm
ET) on any business day, will not be processed until th	ne following business day.	
Note: Please maintain a copy of your records, either s	ave it using the file operation on the browser's men	u or take a print out using the print button
4	Done	
	© 2021 Voya Institutional Plan Services, LLC. All Rights R	Reserved.
	Voya and Voya logo are registered trademarks of Voya Servic	
	Click here for supported browsers	

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 🔻		
AutCont Error	Contributions	2021-11-10-2	Contains Errors		0001 HARDWOODS SP	2.00	Edit Print Delete	
O 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

FINANCIAL	Voya PayCloud							Help
PayCloud Home > Pending/Si	ubmitted Batches	> Payroll						
C INDUSTRIES - 5	551213							
r batch is ready for processin	a Please be advi	sed, the order of the source colu	mns may have cha	nged Enter data into	the appropriate c	olumns		
	g. Thease be advi		inits may have cha	ngeu. Enter data into	the appropriate c	olumns.		
Batch Name		Payroll Date		Ē	5			
AutCont Error		11/10/2021			5			
View Error Messages								
				Search by:	Select	Search		Q
Name 🖤	SSN 🔷	Status 🔷	Alt Vest Date 🖤	Payroll 🔷	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	1
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	
BADIGER1, RAGHAV	12312xxxx	30-Term & Awaiting Payment	05/17/2019	1	0.00	0.00	0.00	
BANDA-DP, EFRENe	48546xxxx	4						► m
Total					2.00	0.00	0.00	0.0

- 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.

S		🖨 Print					
ch: Loan		Payroll Date: 2018-01-01					
ch Name: Test B	atch1	Payroll Seq: 2					
or messages are	displayed in red while warning message	es are displayed in blue.					
or messages are SSN	displayed in red while warning messag Name	es are displayed in blue. Error					

- 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

		ed Batches								
ABC INDUS	TRIES - 551	1213								
Please select Batch 1	Tupo									
r lease select bateli i	lype.									
Batch Type										
Submitted Batches		•								
				Se	arch by:	Select	-	Search		Q
Batch Name 👻	Batch Type 🔷	Payroli Date 🔷	Status 👻	Division/ Location 🚽	EE PRE	TAX 🔷	ROTH RO	DLL 🗸		
Colorado										
PLKI	Combined	2021-12-12-1	Submitted	0001 HARDWOODS SP.	0.10		0.00		Print	
testbatchtoday	Contributions	2021-11-14-1	Submitted	0001 HARDWOODS SP.			35.00		Print	
ContLon Batch	Combined	2021-11-11-11	Submitted	0001 HARDWOODS SP.	0.30		0.00		Print	
ContLon Batch	Combined	2021-11-11-10	Submitted	0001 HARDWOODS SP.	0.30		0.00		Print	
ContLon Batch	Combined	2021-11-11-9	Submitted	0001 HARDWOODS SP.	0.30		0.00		Print	
AutCont Test	Contributions	2021-11-11-8	Submitted	0001 HARDWOODS SP.	. 4.00		6.00		Print	
AutCont Test	Contributions	2021-11-11-7	Submitted	0001 HARDWOODS SP.	4.00		6.00		Print	
AutCont Test	Contributions	2021-11-11-6	Submitted	0001 HARDWOODS SP.	. 4.00		6.00		Print	
AutCont Test	Contributions	2021-11-11-4	Submitted	0001 HARDWOODS SP.	4.00		6.00		Print	
Auto_PRN	Contributions	2021-11-09-22	Submitted		90.00	r.	0.00	Þ	Print	
	< Back									

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

Batch Funding
Funding will be remitted via your agreed upon method other than ACH debit. The file will be posted based on the normal processing standards. Please note if you submit multiple payroll files with different funding methods on the same business day, there may be a delay in the processing of the ACH fund files. Please contact your plan manager if you have any questions.
Do you wish to continue ?
Cancel

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

Voya PayCloud User Guide

Batch Report screen

VOYA.			Voya I	PayCloud		Help Exit
√oya PayCloud Home	Pending/Submitted Batch	es > Pending/Submitted B	atches Print			
Batch: Combined Batch Name: PLKI Submit Date/Time: 09 Plan Number: 551213 Division/Location: SIN				Payroll Date: 12-12-2021 Payroll Seq: 1 Status: Submitted Submitting User ID:		
SSN 73837xxxx	Name ASF, ASFA	x.		Contribution Type EE PRE TAX ROTH	Loan no	Amount \$0.10 \$0.10
				EE F	PRE TAX Total:	\$0.10
					ROTH Total:	\$0.10
				Contr	ributions Total:	\$0.20
				Loan Rep	payment Total:	\$0.00
					Batch Total:	\$0.20
				PreFunded A	ccount Offset:	\$0.20
				Fur	nding 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			
processed until the You have chosen to	successfully on weekends ar following business day. o offset your ACH debit with e	employer funds. Please be	advised that the avai	r, should the market close for trading lable balance of employer accounts a e Voya to request additional funds fro	re subject to change and m	arket fluctuation. The available
	< Back		e	Print		
				ervices, LLC. All Rights Reserved.		
		Voya an		rademarks of Voya Services Company.		
			Click here for su	pported browsers		

Screen Options

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

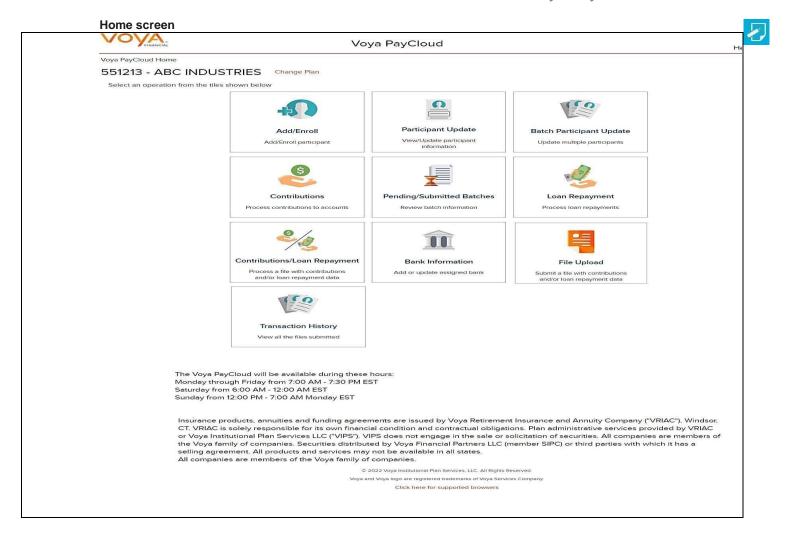
Loan Repayments

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.

Voya PayCloud User Guide



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

VOYA		Voya PayC	loud	Help E
' <mark>oya PayCloud Hom</mark> e > Loan Repayment				
ABC INDUSTRIES - 551213				
To process a loan repayment:				
1 Please give this batch a name and enter a F	Payroll Date.			
Payroll date is used to clarify Current vs. Prior Yea	nr contributions as it	applies to the IRS Limits.		
Batch Name		Payroll Date		
Test name	0	11/01/2021	İ	
 Would you like to upload a file containing p Upload a file I have a file with participant(s) data that I would Process loan repayment manually 				
< Back		Continue		
		© 2021 Voya Institutional Plan Services, LI		
		Voya and Voya logo are registered trademarks	of Voya Services Company.	

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 User Guide

	Voya PayCloud	Help Ex
Voya PayCloud Home > Loan Repayment		
ABC INDUSTRIES - 551213		
To process a loan repayment:		
Please give this batch a name and enter Please give this batch a name and enter	er a Payroll Date.	
Payroll date is used to clarify Current vs. Pric	or Year contributions as it applies to the IRS Limits.	
Batch Name	Payroll Date	
Test name	6 11/01/2021	
I have a file with participant(s) data that I v	would like to Import.	
I have a file with participant(s) data that I v Process loan repayment manually I will manually enter the participant data. Select a File		
 Process loan repayment manually I will manually enter the participant data. 	Browse	
Process loan repayment manually I will manually enter the participant data. Select a File	Browse	
Process Ioan repayment manually I will manually enter the participant data. Select a File View Sample File for formatting Inst	Browse	

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 go 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	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.
	Click on question icon 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."
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.
	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.
Select All Division/Location	Click this box to select all the locations for the batch (if applicable).
Select Division/Location	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. 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.

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.

VOYA.	Voya PayCloud	Help E
Voya PayCloud Home > Loan Repayment > Templ	ates	
ABC INDUSTRIES - 551213		
been added to the selected template to ensure		hat any new columns added to your file have also
Please be advised that Division/Location column Existing Template Select	Go Create New Template	
Delete		
	n.	
< Back		
K Back	© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.	

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.

Voya PayCloud User Guide

- 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

d Home > Loan Repayment > Templates > Creat DUSTRIES - 551213 w template New Template Name from top to bottom, how many rows would bu like to remove.	te Template	From bottom to top, how many ro	ws would		
w template New Template Name om top to bottom, how many rows would	3		ws would		
New Template Name	3		ws would		
om top to bottom, how many rows would	3		ws would		
	3		ws would		
		you like to remove.			
eaders		Trailers			
io Headers	- 0	No Trailers	-	0	
w select each column title: lect an appropriate heading from the dropdown	list for each	ich column. To bypass a column, selec	t Not Applicable.	L.	
lect an appropriate heading from the dropdown	list for each				
	list for each	c	t Not Applicable. D Iumn 4	•	
lect an appropriate heading from the dropdown		c	D lumn 4	-	
lect an appropriate heading from the dropdown A B Column 1 T Column 2		C • Column 3 • Col	D lumn 4 SUB	-	
			o Headers		

Field	Description
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 header fields 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."
From bottom to top,	Select the number of trailer rows contained in the import file.

Voya PayCloud User Guide

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	f
text will splay	within op
- up.	
р	
umbor of trailors	
	default), and
When the	doradity, and
Trailers the values 1 -9 file is rted, these trailer s	
be ignored."field	
k this box if the has implicit	decimal
file decimals, importednchecked.	. If
	your
u	
8	-down list.
	Social
bypass a column, including nam select Not Applicable .	
	text will splay - up. p umber of trailers ude "N When the Trailers the values 1 -9 file is rted, these trailer s be ignored."field k this box if the has implicit file decimals, importednchecked. file leave this box u Select a heading name for each column from the drop The list consists of the basic information such as name and 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

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 Home > Loan R	epayment > Templa	ites > New T	Template T	lemplate					
ABC INDUSTRIES	- 551213								
Create new template									
Existing Template									
1 New Template									
2 From top to bottom, h you like to remove.	ow many rows wou	ıld	3	From bottom to t you like to remov	top, how many row ve.	vs would			
Headers				Trailers					
No Headers		-	0	No Trailers			- 0		
Check this box if	dollar amounts in fil	le do not hav	ve decima	al points					
Now select each colur	nn title:								
Now select each colur	ini ute.								
Add template fields									
Add template fields									
Add template fields Field Type Select	-	Startin	na Positio	n	Field	1 Length		Add Field	
Field Type Select	•	<u></u>	ng Positio		Field	I Length		Add Field	
Field Type Select Field Name	•	Starting Posit	tion F	ield Length		I Length		Add Field	
Field Type Select Field Name Social Security Number	•	Starting Posit	tion F	Field Length 9 E	Edit I Delete	I Length		Add Field	
Field Type Select Field Name	•	Starting Posit	tion F	ield Length 9 E 5 E		t Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number	•	Starting Posit 5 15	tion F	ield Length 9 E 5 E	Edit i Delete Edit i Delete	d Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number	,	Starting Posit 5 15	tion F	ield Length 9 E 5 E	Edit i Delete Edit i Delete	t Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number Loan Amount	•	Starting Posit 5 15	tion F	ield Length 9 E 5 E	Edit i Delete Edit i Delete	t Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number Loan Amount Update Data]	Starting Posit 5 15	tion F	jeld Length 9 E 5 E 5 E	Edit i Delete Edit i Delete	ł Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number Loan Amount	Loan Number 3.65	Starting Posit 5 15	tion F	jeld Length 9 E 5 E 5 E	Edit i Delete Edit i Delete	f Length		Add Field	
Field Type Select Field Name Social Security Number Loan Amount Update Data Uploaded Data Social Security Number) Loan Number	Starting Posit 5 15	tion F (((Loan Ar	jeld Length 9 E 5 E 5 E	Edit i Delete Edit i Delete	t Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number Loan Amount Update Data Uploaded Data Social Security Number 65555 000	Loan Number 3.65	Starting Posit 5 15	tion F	jeld Length 9 E 5 E 5 E	Edit i Delete Edit i Delete	f Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number Loan Amount Update Data Uploaded Data Social Security Number 65555 000 52275 000	Loan Number 3.65 7.54	Starting Posit 5 15	tion F (5 (5 (5 (7.55) 3.43	jeld Length 9 E 5 E 5 E	Edit i Delete Edit i Delete	4 Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number Loan Amount Update Data Uploaded Data Social Security Number 65555 000 52275 000 54354 000	Loan Number 3.65 7.54 3.23	Starting Posit 5 15	tion F 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	jeld Length 9 E 5 E 5 E	Edit i Delete Edit i Delete	f Length		Add Field	
Field Type Select Field Name Social Security Number Loan Number Loan Amount Uploaded Data Social Security Number 65555 000 52275 000 54354 000 73590 000	Loan Number 3.65 7.54 3.23 2.34	Starting Posit 5 15	tion F 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	jeld Length 9 E 5 E 5 E	Edit i Delete Edit i Delete	I Length		Add Field	

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			Voya PayCloud		Help E
Voya PayCloud Home > Loan R	epayment > Templates > T11	Template			
ABC INDUSTRIES	551213				
ADCINDOSTRIES	- 551215				
Existing Template					
T11					
2 From top to bottom, I you like to remove.	now many rows would		ottom to top, how many rows w e to remove.	rould	
Headers		Trailers			
No Headers		- 🔞 No Trailer	s	* 0	
Now select each colu	nn title:				
Field Name	Starting P	osition Field Length			
Social Security Number	1	10	Edit I Delete		
Loan Number	11	з	Edit I Delete		
Loan Amount	15	6	Edit I Delete		
Update Data Uploaded Data	כ				
Social Security Number	Loan Number	Loan Amount			
occur occurry Humber		3.65			
696665555	000	5.00			
	000	7.54			
696665555					
696665555 507152275	000	7.54			
696665555 507152275 254354354	000	7.54 3.23			
696665555 507152275 254354354 684773590	000 000 000	7.54 3.23 2.34			
696665555 507152275 254354354 684773590 382833864	000 000 000 000	7.54 3.23 2.34 5.43	Save And Continue	Save Template	
696665555 507152275 254354354 684773590 382833864 657696288	000 000 000 000	754 323 2.34 5.43 6.54 Cancel	Save And Continue		

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.			Voyal	PayCloud			Help
Voya PayCloud Home > Loan Rep	ayment > Templates :	> oldTemp Templ	late				
ABC INDUSTRIES -	551213						
Existing Template							
oldTemp							
2 From top to bottom, ho you like to remove.	w many rows would	3	From bottom to top, h you like to remove.	ow many rows would			
Headers			Tratlers				
1		- 0	No Trailers		- 0		
Add template fields Field Type Select Field Name Social Security Number Loan Number	• Star 1 10		on Field Length 9 Edit I E 3 Edit I E				
Update Data							
Social Security Number	Loan Number	Loan A	Amount				
	00	02 7.5	5				
507152275	00	01 3.2	2				
507152275 254354354							
	00	012.3	3				
254354354 684773590 382833864	00 00	01 5.4	4				
254354354 684773590	00		4				
254354354 684773590 382833864	00 00	01 5.4	4	ntinue	Save Template		

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 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.

	NCIAL		Voya Pa	ayCloud		1	Hel
Cloud I	Home > Loan Repayment > T	emplates > TestLoan Te	emplate				
ND	USTRIES - 551213	3					
Templa	ate last saved on Tuesday	y, November 23rd, 2	021 09:18:39 AM				
١	View Error Messages						
E	xisting Template						
Т	TestLoan						
	m top to bottom, how many ro like to remove.	ows would	3 From bottom to top, how you like to remove.	v many rows would			
Head	ders		Trailers				
1		- 0	No Trailers	-	0		
	Check this box if dollar amou select each column title:	unts in file do not have	decimal points				
Now	select each column title:		decimal points				
Now	select each column title:					_	
Now	vselect each column title: template can be modified by	selecting a new headir	ng from the drop down list. To by	ipass a column, select Not / D	Applicable.	*	
Now	r select each column title: template can be modified by A	selecting a new headir B	ng from the drop down list. To by C	ipass a column, select Not / D	Applicable. E	×	
Now	select each column title: template can be modified by A Social Security Number *	selecting a new headir B	ng from the drop down list. To by C Not Applicable	pass a column, select Not / D Loan Amount	Applicable. E	•	
Now This	e select each column title: template can be modified by A Social Security Number * SSN	selecting a new headir B Loan Number	ng from the drop down list. To by C Not Applicable PRETAX	pass a column, select Not / D Loan Amount PAYMENT	Applicable. Not Applicable	*	
Now This 1 2	e select each column title: template can be modified by A Social Security Number * SSN	selecting a new headir B Loan Number	ng from the drop down list. To by C Not Applicable PRETAX	pass a column, select Not / D Loan Amount PAYMENT	Applicable. Not Applicable	*	
Now This 1 2	e select each column title: template can be modified by A Social Security Number * SSN	selecting a new headir B Loan Number	ng from the drop down list. To by C Not Applicable PRETAX	pass a column, select Not / D Loan Amount PAYMENT	Applicable. Not Applicable	*	
Now This 1 2	e select each column title: template can be modified by A Social Security Number * SSN	selecting a new headir B Loan Number	ng from the drop down list. To by C Not Applicable PRETAX	pass a column, select Not / D Loan Amount PAYMENT	Applicable. Not Applicable	•	
Now This 1 2	e select each column title: template can be modified by A Social Security Number * SSN	selecting a new headir B Loan Number	ng from the drop down list. To by C Not Applicable PRETAX 50.00	pass a column, select Not / D Loan Amount PAYMENT 119.9	Applicable.	•	
Now This 1 2	e select each column title: template can be modified by A Social Security Number * SSN 589554558	selecting a new headir B Loan Number 6001	ng from the drop down list. To by C Not Applicable PRETAX 50.00	D Loan Amount PAYMENT 119.9 Save Tem	Applicable.	*	

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

		🖨 Prin
ESN	Errör	
20669:0000	SSN and Loan Number 001 not found.	
35685 X000	SSN and Loan Number 001 not found.	
35585000X	SSN and Loan Number 002 not found.	

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

VOVA	Voya PayCloud	Help Exit
Voya PayCloud Home > Loan Repayment		
ABC INDUSTRIES - 551213		
To process a loan repayment:		
Please give this batch a name and ent	er a Payroll Date.	
Payroll date is used to clarify Current vs. Pri	or Year contributions as it applies to the IRS Limits.	
Batch Name	Payroll Date (MM/DD/YYYY)	
Display Active Loans Only		
2 Would you like to upload a file contain	ng 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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	Voya and Voya logo are registered trademarks of Voya Services Company.	

Field	Description				
Batch Name	Enter the batch name. Batch names cannot contain commas. Click the question icon next to the Batch Name for help informatio The help information will display in a pop-up and will read "The ba 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	Click this box to display only active loans in the plan. The system
Only	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

VOYA.				Voya Pay	Cloud			Help Exi
Voya PayCloud Home > Loan R	lepayment > Loan	Payment Details						
ABC INDUSTRIES	- 551213							
Payment amount				c	hanging the fu	nding source (temporari	ily)	
To populate payment amo - Enter the amount - Select Principal Balance - Select Payoff Amount - Select Excepted Amoun - Multiply the Expected A	1				Repayment.		on the participant through	e bank account for this loan the Laan Repayment datch. To Cupdate.
Baton Name		Payroli Date						
lest	1	11/01/2021		iii				
1								
		Search by: Select		Search		a		
Name 🗻	SSN 🗢	Loss f 🗢	Principal 🗢 Belence	Expected + Amount	Payment Athount	-		
DEJONG-DP, DONALD	927008951	001	1.044.67	20.00	0.00	-		
DOCKINS-DP, RUDOLF	706676155	001	527.99	30.05	0.00			
GRAINGER-DP. JEAN	235750073	001	50.65	65.01	0.00			
HUARD-DP, GABRIEL	265675174	001	2,375.96	63.14	0.00			
KONOPKA-DR. TONIE	584613023	001	18.156.93	164.00	0.00			
MARLEY-DP. BOYD	163465940	001	1,595.78	59.75	0.00			
MART-DP. GROVER	041595437	001	0,769.25	151.02	0.00			
PLATT-DP. PREEMAN	019701503	001	34,692.19	504.61	0.00			
SEIGLER-DP. ROBBY	574793411	001	43,917.90	507.49	0.00			
SIMIEN-DP, AL	531659970	001	12,686.74	321.79	0.00	-		
4								
Total					0.00			
Add Perticipants from	Alternate Location		CTED AMOUNT		MUR	эну		
	(Back		Cancel © 2021 Voya In					

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.

Field	Description
Payment Amount	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.
	NOTE: While Loan Payoff is available to all users, it may not be activated. Contact Voya for assistance
Multiply Payment Amounts by	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.

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.

	VOYA.				V	oya Pa	Cloud	Help Exit
	Voya PayCloud Home > Loan Re	payment > Loan	Payment Deta	ills				
	ABC INDUSTRIES	551213						
	Payment amount					C	hanging the fur	unding source (temporarily)
	To populate payment amou	nt you may do Al	VY of the follo	wing:				erent division location to temporarily change the bank account for this loan
	Enter the amount Select Principal Balance Select Payoff Amount Select Excepted Amount Multiply the Expected Ar	iount at the bott	om of the table					ccation will not be updated on the participant through the Loan Repayment batch. To hange a participant's division location, use Participant Update.
	Batch Name		Payroli Da	te				
	test		11/01/20			茴		
			Search by:	Select	•	iearch		٩
	Neme 🗻	SSN 🖤	Loan # 🔻	Principal • Balance		oocted 🐨	Payment 👻	*
	DEJONG-DP. DONALD	927808951	001	1,044.67	2	00.00	0.00	
	DOCKINS-DP. RUDOLF	706676188	001	527.99	3	0.06	0.00	
	GRAINGER-DP. JEAN	235750073	001	50.66	6	5.91	45.00	
	HUARD-DP. GABRIEL	265675174	001	2,375.96	6	8.14	0.00	
	KONOPKA-DP, TONIE	584613023	001	18,156.93	16	408	43.00	
	MARLEY-DP. BOYD	163465948	001	1,595.78	5	9.75	0.00	
	MART-DP, GROVER	041696437	001	8,769.25	35	1.0.2	0.00	
	PLATT-DP, FREEMAN	819701503	001	34,692.19	5	04,61	0.00	
	SEIGLER-DP, ROBBY	574793411	001	43,917,98	5	07.49	20.00	
	SIMIEN-DP, AL	531659970	001	12,686.74	3	1.79	0.00	-
	1							
	Total						108.00	
	Add Participants from A	ternate Location		EXPECTED AMOU		1 •	Митр	tply
1	<	Back		© 2021 Ve	logo are n	vitel Plan Servic gistereci trader	ave And Continue es, LLC. All Rights Re tarks of Voya Service ted browsers	Reserved.

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

10	FINANCIAL		Voy	a PayCloud			Help	Exit
oya Pay	Cloud Home > Contributio	o <mark>ns > Payroll > A</mark> dd Participant t	o Batch					
BC	INDUSTRIES - 5	551213						
				ed to submit contributions for a participant multiple divisions/locations, you may add				
If you h	nad previously added a par	ticipant to your batch, they will	be displayed below and ye	ou may delete them at any time.				
To add	a participant, locate them	via the search tool below and o	lick 'Add'.					
0	Select the Div Sub to appl	y funding to.						
-	Select Division/Location to A	pply Funding to SSN						
	0001 HARDWOODS SPECIA							
	If the participant has transfe	erred to your division/location and	l the division/location has not	t yet been updated, please contact the current	division/location:			
	Division/Location : 9999							
2	manager. Search By Search By SSN	*						
3	Search Participant by SS	ŝN	Search					
	Social Security Number 🔷	Participant Name 🖤		Added Participants				
	123-45-6799	TEST, TEST ASD T	Add	TEST, TEST ASD	123456799	0001 Ren	nove	
	999-99-0002	TAKEOVER 2	Add	TAKEOVER, 3	999990003	0001		
	999-99-0003	TAKEOVER 3	Add	TAKEOVER, 3	999990003	0001 Ren	nove	
	999-99-0004	TAKEOVER 4, FN 4	Add					
				DONE				
			_					

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

FINANCIAL			Voy	a PayCloud				Help E
ya PayCloud Home >	Pending/Submitted Ba	atches						
ABC INDUS	TRIES - 55121	3						
Please select Batch 1	Туре							
Your loans batch	ı file has been adde	d to the list of pe	ending batches below.					
Batch Type								
Pending Batches	•							
				Se	arch by: Select	• Search		Q
Batch Name 🖤	Batch Type 🖤	Payroll Date 🤝	Status 🔷	Scheduled Date 🖤	Division/ Location 🖤	EE PRE TAX 🖤		
 AutCont Error 	Contributions	2021-11-23-5	Scheduled for Process	2021-11-24	0001 HARDWOODS SP	2.00	Edit I Print I Delete	•
O AutCont Error	Contributions	2021-11-23-3	Scheduled for Process	2021-11-24	0001 HARDWOODS SP	2.00	Edit Print Delete	
	Contributions	2021-11-23-2	Ready to Post		0001 HARDWOODS SP	4.00	Edit Print Delete	
 AutCont Test 	Contributions							
AutCont Test AutCont Error	Contributions	2021-11-23-1	Scheduled for Process	2021-11-24	0001 HARDWOODS SP	2.00	Edit Print Delete	
		2021-11-23-1 2021-11-19-4	Scheduled for Process	2021-11-24	0001 HARDWOODS SP 0001 HARDWOODS SP	2.00 0.30	Edit Print Delete	
AutCont Error	Contributions			2021-11-24				
 AutCont Error ContLon Batch 	Contributions Combined	2021-11-19-4	Ready to Post	2021-11-24	0001 HARDWOODS SP	0.30	Edit I Print I Delete	
 AutCont Error ContLon Batch AutCont Test 	Contributions Combined Contributions	2021-11-19-4 2021-11-19-3	 Ready to Post Ready to Post 	2021-11-24	0001 HARDWOODS SP 0001 HARDWOODS SP	0.30 4.00	Edit Print Delete Edit Print Delete	
 AutCont Error ContLon Batch AutCont Test Test52 	Contributions Combined Contributions Loans	2021-11-19-4 2021-11-19-3 2021-11-15-10	 Ready to Post Ready to Post Ready to Post 	2021-11-24	0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP	0.30 4.00 0.00	Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete	
 AutCont Error ContLon Batch AutCont Test Test52 tst 	Contributions Combined Contributions Loans Combined	2021-11-19-4 2021-11-19-3 2021-11-15-10 2021-11-15-9	 Ready to Post 	2021-11-24	0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP	0.30 4.00 0.00 10.20	Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete	
AutCont Error ContLon Batch AutCont Test Test52 tst Loan11152021	Contributions Combined Contributions Loans Combined Loans	2021-11-19-4 2021-11-19-3 2021-11-15-10 2021-11-15-9 2021-11-15-8	 Ready to Post 	2021-11-24	0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP	0.30 4.00 0.00 10.20 0.00	Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete	Ţ
AutCont Error ContLon Batch AutCont Test Test52 tst Loan11152021	Contributions Combined Contributions Loans Combined Loans	2021-11-19-4 2021-11-19-3 2021-11-15-10 2021-11-15-9 2021-11-15-8	 Ready to Post 	2021-11-24 Run Batch	0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP	0.30 4.00 0.00 10.20 0.00	Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete	Ţ
AutCont Error ContLon Batch AutCont Test Test52 tst Loan11152021	Contributions Combined Contributions Loans Combined Loans Loans	2021-11-19-4 2021-11-19-3 2021-11-15-10 2021-11-15-9 2021-11-15-8	 Ready to Post 	Run Batch	0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP 0001 HARDWOODS SP.	0.30 4.00 0.00 10.20 0.00	Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete Edit I Print I Delete	Ţ

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

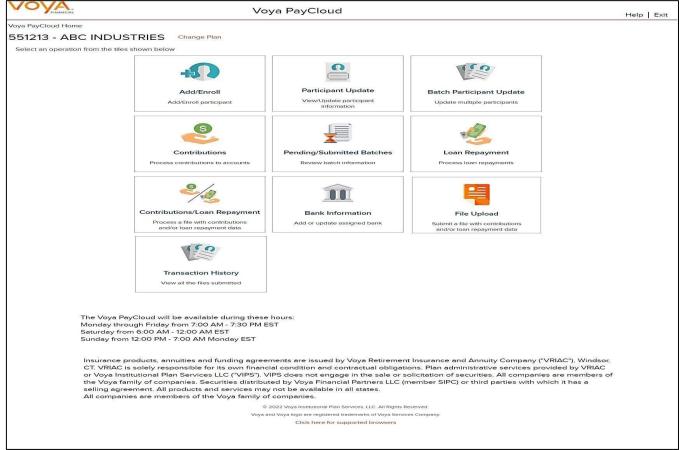
This option allows you to process a file with contributions and/or loan repayment data. Includes the functions:

- · 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



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

VOVA. FORMERAL		Voya PayCloud		Help Exit
Voya PayCloud Home > Contribution/Loan Repayment				
ABC INDUSTRIES - 551213				
Process a file with contributions and loan repayment d	ita.			
To process a contributions/loans file:				
Please give this batch a name and enter a Pays	oll Date.			
Payroll date is used to clarify Current vs. Prior Year co	ntributions a	it applies to the IRS Limits.		
	-			
Batch Name	0	Payroll Date (MM/DD/YYYY)	(iii)	
O Prefunded Account Contribution	W	at's This?		
Participant Account Contribution				
Display Active Participants Only				
🔿 Display All				
2 Would you like to upload a file containing parti	ipant data?			
O Upload a file I have a file with participant(s) data that I would like	to import			
Process contributions/loans manually	to import.			
I will manually enter the participant data.				
Display Active Loans Only				
				-11
< Back		Cominue		
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		Voya and Voya logo are registered trademarks of Voya Serv	vices Company.	
		Click here for supported browsers		

Field	Description	

Batch Name	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.
	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."
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.
8	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.
Participant Account Contribution	Select this option to contribute to the Participant Account through the contribution batch
Display Active Participants Only	Select this option to include only active participants in the contribution batch. By default, this will be selected.
	Note: This option is available for selection only for Participant Account Contribution
Display Active and Ineligible Participants	Select this option to include participants which are either in an active status or ineligible status in the contribution batch
Only	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."
	Note: This option is available for selection (depending on plan settings) only for Participant Account Contribution
Display All Participants	Select this option to include all participants in the contribution batch
	Note: This option is available for selection only for Participant Account Contribution

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 ٠ 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. ٠
- 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)
- o 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):

o 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.
- o If fractional hours are used, they cannot exceed 3 digits to the right of the decimal.

Current Hours (Plan year or Anniversary hours): o Accumulate option – special set up required. The amount submitted will add to the total that exists on the system. o 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

VOYA	Voya PayCloud	Help Exit
Voya PayCloud Home > Contribution/Loan Repayme	ant > Templates	
ABC INDUSTRIES - 551213		
You can select an existing template or create a ne been added to the selected template to ensure de	w one by selecting from the options below. If you use an existing template, please verify that any new columns a tail will import correctly.	dded to your flie have also
Please be advised that Division/Location column is	s required.	
Select Existing Contributions/Loans Template		
 Create New Contributions/Loan Template fror Existing Contributions or Loans Template 	T Greate New Template	
< Back		
	© 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	

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 or 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

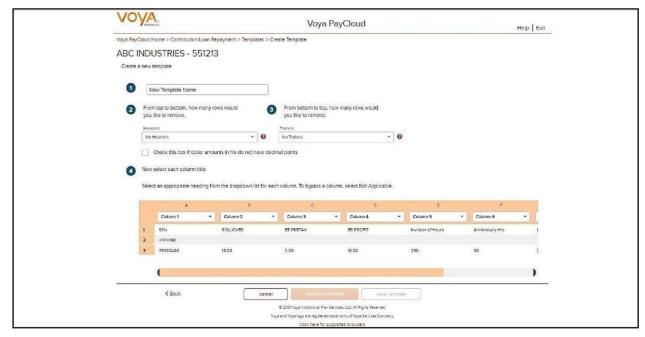
Click Back to go to the Contributions/Loan Repayments Set Up screen

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



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

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 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."
 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. 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.
Check this box if the imported file has implicit decimals. If your file has decimals, leave this box unchecked.
heading name for each column from the drop-down list. The list consists of the tions information including a Termination Date and Termination reason, Loan ion i.e. Loan ID, Loan Number, the optional fields set as 'Required or Updateable' espective modules of the plan and an entry for each available source in the plan. ss a column, including name, select Not Applicable . If Loans are not allowed for , the Loan information is

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

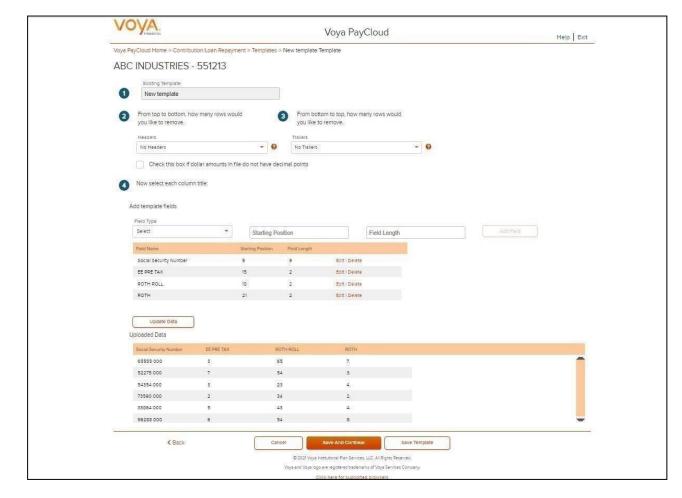
Map Column Header Screen

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

-	DYA.			1	/oya PayC	loud			Help] Exit
Voya P	Voya PayCloud Home > Contribution Loan Repayment > Templates > New template Template								
ABC	INDUSTRIES	551213							
Crea	ste new template								
	Existing Template								
0	New template								
0	From top to bottom, he you like to remove.	w many rows would	0	From bottom you like to re	to top, how man move.	y rows would			
	Headers			Traliers					
	No Headers		- 0	No Trailers			- 0		
	Add template fields Field Type Select	*	Clading Desile			Field Langth			
			Starting Positio			Field Length			
	Field Name			Teld Length					
	Social Security Number	5		9	Ecit I Delete				
	ROTH ROLL	1		2	Edit i Delete				
	ROTH	2		2	Edit / Derete				
	Update Data								
	Social Security Number	EE PRE TAX	ROTH	POLL	ROTH				
	65555 000	5	65		7.				-
	52275 000	7	54		3.				
	54354 000	3	23		4				
	73590 000	2	34		2.				
	33864 000	5	43		4.				
	96283 000	6	54		9.				-
	€ Back		Cancel	Se	ve And Continue	5a	ve Template]	
			Yo	ye and Voya logo sre	itionel Pien Services, L registered trademarks here for supported	of Vaya Services Co			

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

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.

VOYA Voya PayCloud Help | Exit Voya PayCloud Home > Contribution/Loan Repayment > Templates > New template Template ABC INDUSTRIES - 551213 Existing Template 1 New template From bottom to top, how many rows would you like to remove. From top to bottom, how many rows would you like to remove. 2 3 Headers Trailers - 0 No Headers - 0 No Trailers Check this box if dollar amounts in file do not have decimal points Now select each column title: Add template fields Field Type Select * Starting Position Field Length con i perete Edit i Derete Social Security Number SIGTH 2061 IV ¥ 2 0 12 Update Data Uploaded Data RO EE PRE 65555 000 65 3 7 52275 000 54 3. 7 54354 000 3 23 4 73590 000 34 2 2. 33864 000 43 4 96288 000 54 6 < Back Cancel Save Template © 2021 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company Click here for supported browser

Existing Template screen

Field	Description
Existing Template	Template name.
From top to bottom, how many rows would you like to	The number of headers can be selected. Upon clicking the question icon, the following text will display within a pop-up.
remove?	"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	The number of trailers can be selected. Upon clicking the question icon, the following text will display within a pop-up.
to remove?	"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 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**

Voya Pays	Cloud Home > Contribution/Loan	Repayment > Templates > tes	t Template				
ABCI	NDUSTRIES - 5512	.13					
Create	new template						
0.	emplate last saved on Wedr	esday November 17th 20	21 06-40-27 AM				
(View Error Messages						
	Existing Template						
0	test						
0	From top to bottom, how man you like to remove.	rows would 3	From battom to top, how you like to remove.	v many rows would			
	Headers		Traters				
	No Headers * 🚱 No Trailers *						
	Check this box if dollar an	nounts in file do not have decin	mal points				
0	Now select each column title:						
0							
	This template can be modified	by selecting a new heading fro	om the drop down list. To by	pass a column, select Not Ap	plicable.		
	A	8	c	D	F	F	
	Social Security Number	* ROLLOVER *	EE PRE TAX	Not Applicable -	Not Applicable -	Not Applicable 👻	
		ROLLOVER	EE PRETAX	ER PROFIT	Number of Hours	Anniversary Hrs	G
	1 SSN						
	1 SSN 2 41174198	Indecoren					
		15.00	2.00	18.00	250	50	3
	2 41174198		2.00	18.00	250	50	
_	2 41174198		2.00	18.00	250	50	3)

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
X0000X6188	Payment amount must match Expected Amount or the Payoff Amount.
	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/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:		
Please give this batch a name and enter a Payroll Date.		
Payroll date is used to clarify Current vs. Prior Year contributions i	as it applies to the IRS Limits.	
Batch Name	Pagroll Date	
test 😜	11/01/2021	
Prefunded Account Contribution W	hat's Tivs?	
Participant Account Contribution		
Display Active Participants Only		
O Display All		
2 Would you like to upload a file containing participant data	8	
O Upload a file		
I have a file with participant(s) data that I would like to import.		
Process contributions/loans manually I will menually effect the participant cata.		
Display Participants With Contributions		
Copy Payroll Data From Select •		
The following sources are available to be included in you	r batch. Should you conv	
from an existing batch, the default sources will be popula	ted based on the batch	
copied. If you need to add or delete sources from the bat sources as applicable.	ch, check or uncheck the	
available Sources to include in Batch		
EE PRE TAX		
ROTH ROLL		
ROLLOVER		
ROTH TAKEOVER		
TAKEOVER		
3		
Display Active Loans Only		
< Back	Continue	
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	Voyaand Voya logo are registered tedemarks of Voya Services Company.	

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

VOYA.			Voya PayC	loud		Help Exit
Voya PayCloud Home	> Contribution/Loan Repayment					
ABC INDUST	RIES - 551213					
Process a file with c	ontributions and loan repayment data.					
To process a contril	outions/loans file:					
Please give this b	atch a name and enter a Payroll Date.					
Payroll date is used	to clarify Current vs. Prior Year contributions as I	it applies t	to the IRS Limits.			
Batch Name			Payroll Date			
test		0	11/01/2021			
Prefunde	ed Account Contribution	What's	This?			
O Participa	nt Account Contribution					
sources as a		batch, cl	heck or uncheck the			
	rces to Include In Batch					
EE PRE						
ROTH						
ROLLC						
ROTH						
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	ICH .					
V STRE						
	< Back		Continue			
	< Back		Continue © 2021 Voya Institutional Plan Services, LL	C. All Rights Reserved.	£	

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

VOYA.	Voya PayCloud		Help Exit
Voya PayCloud Home > Contribution/Loan Repayment			···
ABC INDUSTRIES - 551213			
Process a file with contributions and loan repaymen	a		
To process a contributions/loans file:			
Please give this batch a name and enter a P	II Date.		
Payroli date is used to clarify Current vs. Prior Yea	tributions as it applies to the IRS Limits.		
Batch Name	Payroll Date		
test	6 11/01/2021		
O Prefunded Account Contribution	What's This?		
Participant Account Contribution			
Display Active Participants Only			
 Display All 			
Would you like to upload a file containing particular	pant data?		
Upload a file	to Import.		
Process contributions/loans manually I will manually enter the participant clata.			
Display Participants With Contributions			
Copy Payroll Data From			
Select	•		
The following sources are available to be in from an existing batch, the default sources copied. If you need to add or delete sources sources as applicable.	e populated based on the batch		
Available Sources to Include In Batch			
EE PRE TAX			
ROTH ROLL			
ROLLOVER			
ROTH			
TAKEOVER			
SH MATCH			
Display Active Loans Only			
< Back	Continue		
	© 2021 Voya Institutional Plan Gervices, LLC. All Right	its Reserved.	
	Voys and Voys logo are registered trademarks of Voys Se		
	Click here for supported browsers		

Field	Description
Batch Name	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.
	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."
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.
	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.
Prefunded Account Contribution	Select this option to contribute to the Prefunded Account through the contribution batch
Contribution	Note: This option will display depending on the plan settings
	Clicking on the 'What's this?' link will open the Prefunded Account Guide in a new window
Participant Account Contribution	Select this option to contribute to the Participant Account through the contribution batch
Display Active Participants Only	Select this option to include only active participants in the contribution batch. By default, this will be selected.
	Note: This option is available for selection only for Participant Account Contribution
Display Active and Ineligible Participants Only	Select this option to include participants which are either in an active status or ineligible status in the contribution batch
Unity	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."
	Note: This option is available for selection (depending on plan settings) only for Participant Account Contribution

Division/Location	(may not appear, depending on plan settings).
Display Participants with Contributions	Filters for only the active plan participants that have made contributions (optional). Thi does not include active participants that have not contributed.
	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
Copy Payroll Data From	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).
	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
Source Selection	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.
Display Active Loans	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.
	Note : This option is displayed only for plans offering Participant loans.
Display All Participants	Select this option to include all participants in the contribution batch



Note: This option is available for selection only for Participant Account Contribution

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

vO	FINANCIAL		Voy	a PayCloud			Help	Exit
'oya Pay	Cloud Home > Contributio	n/Loan Repayment > Payroll :	> Add Participant to Batch					
ABC	INDUSTRIES - 5	551213						
				ed to submit contributions for a particip multiple divisions/locations, you may a				
If you I	had previously added a par	ticipant to your batch, they w	ill be displayed below and ye	ou 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	y funding to.						
-	Select Division/Location to Ap	oply Funding to SSN						
	0001 HARDWOODS SPECIA	LTY PRODUCTS						
	If the participant has transfe	rred to your division/location a	- nd the division/location has not	t yet been updated, please contact the curr	ent division/location:			
	Division/Location : 9999							
	If the participant is actively e manager.	employed in multiple divisions/l	ocations and the primary divisi	ion/location should be changed to your au	thorized division/location, please	e contact your relation.	ship	
-	Search By							
2	Social Security Number	*						
3	Search Participant by SS	N	Search					
	Social Security Number 💗	Participant Name 🖤		Added Participants				
	123-45-6799	TEST, TEST ASD T	Add	TEST, TEST ASD	123456799 000	Remove		
	999-99-0002	TAKEOVER 2	Add	TAKEOVER, 3	999990003 000	01 Remove		
	999-99-0003	TAKEOVER 3	Add	TAREOVER, 3	333330003 000	Remove		
	999-99-0004	TAKEOVER 4, FN 4	Add					
				DONE				
			© 2021 Voya Institutional	Plan Services, LLC. All Rights Reserved.				
				ered trademarks of Voya Services Company.				
			Click here t	for supported browsers				

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 – Prefun	Ided Account Contribution
---	---------------------------

/oya PayCloud Home > C	Contribution/Loan Repayme	nt > Payroll						
ABC INDUSTR	IES - 551213							
Your batch is ready for j	processing. Please be advis	ed, the order of the source co	olumns may nave chai	nged. Enter data int	o the appropriate c	olumns.		
Batch Name		Payroll Date						
test		11/01/2021						
You may contribute to accepted by source.	o your Plan's Prefunded Acc	count using this contribution b	atch by indicating the	amount by money	source you wish to	contribute. Only p	positive amounts will t	be
	o your Plan's Prefunded Acc	count using this contribution b	atch by indicating the	amount by money	source you wish to ROLLOVER 👻	contribute. Only ROTH 	Dositive amounts will b	be SH
accepted by source.								
accepted by source.	SSN 🖝	Status 🐨	EE PRE TAX 👻	ROTH ROLL 👻	ROLLOVER 👻	ROTH 👻	TAKEOVER 🖝	SH
accepted by source. Name 👽	SSN 🖝	Status 🐨	EE PRE TAX 🔝	ROTH ROLL <table-cell></table-cell>	ROLLOVER -	ROTH 🛫	TAKEOVER 👻	SH 0.(
accepted by source.	SSN 🖝	Status 🐨	EE PRE TAX 👻	ROTH ROLL 👻	ROLLOVER 👻	ROTH 👻	TAKEOVER 🖝	SH

Contributions/Loan Repayments Input screen – Participant Account

ur batch is ready for processing. Please be a	551214						
Section Se							
our batch is ready for processing. Please be a ayment amount	idvised, the order						
ayment amount		of the source columns m	ay have changed. E	nter data into	the appropriate columns	3.	
			Changing t	he funding so	urce (temporarily)		
To populate payment amount you may do A	NY of the following	ng:	Select a Repaym		sion/location to tempora	rily change the b	ank account for this loa
Enter the amount manually Select Principal Balance					cation.you are temporarily c.	hanging the bank a	ccount from which the
Select Payoff Amount			funding f	or this Contribut	tion or Loan Repayment is c	oming from This di	vison/location will not be
Select Excepted Amount Multiply the Expected Amount at the botton	n of the table				nt record through the Contr vision/location,use Participa		ment batch To permanenti
manippy the Expected Amount of the botton			change a	gan nagan na an	enter a constant part of the part	in optimite.	
Batch Name		Payroll Date					
B6		10/21/2021		Ċ	1		
				Search by:	Select •	Search	٩
Name 🗸 SSN 👻	Divison/ Location	🗢 Alt Vest Date 🗢	Periods of Svc 🖤	Number Of Hours	👻 Elig Hrs Anniv 👻	Salary 🔝	Eligible Date 🗢
AGEE-DP. JACKELYN 47144xxxx	0001	11/23/2021	з	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	000	
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	
	and the second se						10/30/2018
	CANED OF T		8	0.00	4,212.00	0.00	-
	4			1		1	•
By clicking on a participant's name, you can		a serie grandeline en angelen en en er	and the second second second second	1. 1	an n		
BUONO-DP, KIANA 05745xxxx CALLAHAM-DP, ERNA 39643xxxxx CARLIN-DP, MAREN up 01742xxxxx Total	1001 1001		1 8	0.00	2.924.00 4.212.00	0.00	10/30/2018

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

FINANCIAL			Vo	ya PayClou	d			Help
PayCloud Home > Contribu	tion/Loan Repayme	ent > Payroll						
ARS ADVERTISIN	IG, INC 5	51214						
ur batch is ready for process	ing. Please be adv	ised, the order	of the source columns m	ay have changed. E	inter data into	the appropriate columns	NE .	
yment amount				Changing	the funding so	urce (temporarily)		
					100 T 10			
To populate payment amour	nt you may do ANY	of the following	ng:			sion/location to temporar	ily change the b	ank account for this loa
Enter the amount manually Select Principal Balance Select Payoff Amount Select Excepted Amount Multiply the Expected Amou	unt at the bottom o	f the table		funding i updated	ting a divison/lo for this Contribu on the participa	cation,you are temporarily cl lion or Loan Repayment is co nt record through the Contri vision/location,use Participai	oming from. This di Ibution/Loan Repay	vison/location will not be
Batch Name			Descent Date					
Batch Name B6			Payroll Date 10/21/2021		ţ.	5		
					Search by:	Select *	Search	Q
Name 🔫	SSN 🔝	Divison/	🗢 Alt Vest Date 🗢	Periods of Svc 🗢	Number Of	🗢 Elig Hrs Anniv 🗢	Salary 🔝	Eligible Date 🔝
Name 🔫	SSN 🗸	Divison/ Location	✓ Alt Vest Date ✓	Periods of Svc 🗢	Number Of Hours	👻 Elig Hrs Anniv 👻	Salary 🖤	Eligible Date 🔫
Name 🔫 AGEE-DP, JACKELYN	55N 👻 47144xxxx		 Alt Vest Date 11/23/2021 	Periods of Svc 🔝		Elig His Anniv 🗸	Salary 🛩	Eligible Date 👻
		Location			Hours			Eligible Date 🗢
AGEE-DP, JACKELYN	47144xxxx	Location 0001		3	Hours 10.00	10.00	0.00	Eligible Date 🗢
AGEE-DP, JACKELYN ASHWORTH-DP, RENATO	47144xxxx 58346xxxx	Location 0001 1003		3 5	Hours 10.00 0.00	10.00 4,212.00 4,212.00 4,212.00 4,212.00	0.00	Eligible Date 🗢
AGEE-DP, JACKELYN ASHWORTH-DP, RENATO BALCH-DP, CHUNG	47144xxxx 58346xxxx 18244xxxx	0001 1003 1003		3 5 26	Hours 10.00 0.00 0.00	10.00 4,212.00 4,212.00	0.00	Eligible Dete 👻
AGEE-DP, JACKELYN ASHWORTH-DP, RENATO BALCH-DP, CHUNG BERESFORD-DP, CARMINA BERESFORD-DP, CORGIANA BLOSSER-DP, LUVENIA	47144xxxx 58346xxx 18244xxxx 99065xxxx 48243xxxx 07749xxxx	Location 0001 1003 1003 1001		3 5 26 9 15 14	Hours 10.00 0.00 0.00 10.00	10.00 4,212.00 4,212.00 4,212.00 4,212.00 4,212.00 4,212.00	0.00 0.00 0.00 0.00 0.00 0.00	Eligible Date 🛩
AGEE-DP, JACKELYN ASHWORTH DP, RENATO BALCH-DP, CHUNG EERESFORD-DP, CARMINA BLOSSER-DP, GEORGIANA BLOSSER-DP, LUVENIA BOURGOIN-DP, HALLEY	47144xxxx 58346xxx 18244xxx 99065xxxx 48243xxxx 07749xxxx 91247xxxx	Location 0001 1003 1003 1001 1001 1001 1001		3 5 26 9 15 14 23	Hours 10.00 0.00 10.00 0.00 0.00 0.00 0.00	10.00 4.212.00 4.212.00 4.212.00 4.212.00 4.212.00 4.212.00 4.220.00	0.00 0.00 0.00 0.00 0.00 0.00 0.00	Eligible Date 💙
AGEE-DP, JACKELYN ASHWORTH DP, RENATO BALCH-DP, CHUNG BERESFORD-DP, CARMINA BLOSSER-DP, GEORGIANA BLOSSER-DP, LUVENIA BOURGOIN-DP, HALLEY BREW-DP, VICTOR	47144xxxx 58346xxxx 99065xxxx 48243xxxx 07749xxxx 91247xxxx 47347xxxx	Location 0001 1003 1001 1001 1001 1001 1001 100		3 5 26 9 15 14 23 19	Hours 10.00 0.00 10.00 0.00 0.00 0.00 0.00 0	10.00 4,212.00 4,212.00 4,212.00 4,212.00 4,212.00 4,220.00 4,212.00	000 000 000 000 000 000 000 000	Î
AGEE-DP, JACKELYN ASHWORTH-DP, RENATO BERESFORD-DP, CARMINA BLOSSER-DP, GOORJANA BLOSSER-DP, GOORJANA BOURGOIN-DP, HALLEY BREW-DP, VICTOR BUOND-DP, KIANA	47144xxxx 58346xxxx 18244xxxx 99065xxxx 48243xxxx 07749xxx 91247xxxx 47347xxxx 05741xxxx	0001 1003 1003 1001 1001 1001 1001 1001		3 5 26 9 15 14 23 19 1	Hours 10.00 0.00 10.00 0.00 0.00 0.00 0.00 0	10.00 4,212.00 4,212.00 4,212.00 4,212.00 4,212.00 4,212.00 4,220.00 4,212.00 2,924.00	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	Eligible Date V
AGEE-DP, JACKELYN ASHWORTH DP, RENATO BALCH-DP, CHUNG BERESFORD-DP, CARMINA BLOSSER-DP, GEORGIANA BLOSSER-DP, LUVENIA BOURGOIN-DP, HALLEY BREW-DP, VICTOR	47144xxxx 58346xxxx 99065xxxx 48243xxxx 07749xxxx 91247xxxx 47347xxxx	Location 0001 1003 1001 1001 1001 1001 1001 100		3 5 26 9 15 14 23 19	Hours 10.00 0.00 10.00 0.00 0.00 0.00 0.00 0	10.00 4,212.00 4,212.00 4,212.00 4,212.00 4,212.00 4,220.00 4,212.00	000 000 000 000 000 000 000 000	Î

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

VU	FINANCIAL		Voya PayCloud	Help Exit
/oya Pay	Cloud Home > Contributio	n/Loan Repayment > Payroll	> Add Participant to Batch	
ABC	INDUSTRIES - 5	551213		
1000			isplay in the batch. If you need to submit contributions for a participant that has transferred to another unauthorized on, or is actively employed in multiple divisions/locations, you may add them here by using the search feature below.	
lf you l	had previously added a par	ticipant to your batch, they w	III be displayed below and you may delete them at any time.	
To add	a participant, locate them	via the search tool below and	l click 'Add'.	
1	Select the Div Sub to apply	y funding to.		
•	Select Division/Location to Ap	oply Funding to SSN		
	0001 HARDWOODS SPECIA]	
	Search By			
2	Social Security Number			
3	Search Participant by SS	N	Search	
	Codd County Munhor	Participant Mana		
	Social Security Number 🔻	Participant Name 🔝	Name and American A American American Ame	
	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	
			DONE	
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			Voya and Voya logo are registered trademarks of Voya Services Company.	

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.

FINANCIAL		Voya PayCloud	Help E>
PayCloud Home > Contribution/L	.oan Repayment > Payroll > Add	dditional Participants	
C INDUSTRIES - 55	51213		
		at is not displaying in your data file, you may add them here by sea	arching for them using their SSN or Last Name
	an repayments for a paracipant	and not appropring in your data me, you may data men none by set	arching to them using their bort of cust runits.
Search By Social Security Number	•		
Social Security Number			
Search Participant by SSN		Search	
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	
•			
		DONE	
		© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.	
		ya and Voya logo are registered trademarks of Voya Services Company.	
		Click here for supported browsers	

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

FINANCIAL			Voy	a PayCloud				Help	Ī
PayCloud Home > Pe	ending/Submitted Ba	itches							
	RIES - 55121	3							
ease select Batch Typ		-							
ease select batch typ	e								
Your combined bat	ch file has been a	dded to the list	of pending batches belo	w.					
Batch Type Pending Batches	•								
submit your batch for	r processing: (1) Sele	ect the circle to the	left of the batch name and (2) click the Run Batch	Button at the bottom of the	screen.			
				Sea	rch by: Select	• Search		Q	
Batch Name 🔻	Batch Type 🔻	Payroll Date 🔷	Status 🖝	Scheduled Date 🔻	Division/ Location 🔻	EE PRE TAX 🔻			
AutCont Error	Contributions	2021-11-23-5	Scheduled for Process	2021-11-24	0001 HARDWOODS SP	2.00	Edit I Print I Delete	•	
AutCont Error	Contributions	2021-11-23-3	Scheduled for Process	2021-11-24	0001 HARDWOODS SP	2.00	Edit I Print I Delete		
AutCont Test	Contributions	2021-11-23-2	Ready to Post		0001 HARDWOODS SP	4.00	Edit Print Delete		
AutCont Error	Contributions	2021-11-23-1	Scheduled for Process	2021-11-24	0001 HARDWOODS SP	2.00	Edit Print Delete		
ContLon Batch	Combined	2021-11-19-4	Ready to Post		0001 HARDWOODS SP	0.30	Edit Print Delete		
AutCont Test	Contributions	2021-11-19-3	Ready to Post		0001 HARDWOODS SP	4.00	Edit Print Delete		
tst	Combined	2021-11-15-9	Ready to Post		0001 HARDWOODS SP	10.20	Edit Print Delete		
Loan11152021	Loans	2021-11-15-8	Ready to Post		0001 HARDWOODS SP	0.00	Edit Print Delete		
Template 1	Loans	2021-11-15-7	Ready to Post		0001 HARDWOODS SP	0.00	Edit Print Delete		
B521	Combined	2021.11.15.6	Ready to Post		0001 HARDWOODS SP	74.00	Edit Print Delete	-	
			_						_
	< Back			Run Batch					
			© 2021 Vera lestitutional E	lan Services, LLC. All Rights	Decenard				
			© 2021 Voya Institutional P	ion services, LEG. All Rights	Reserved.				

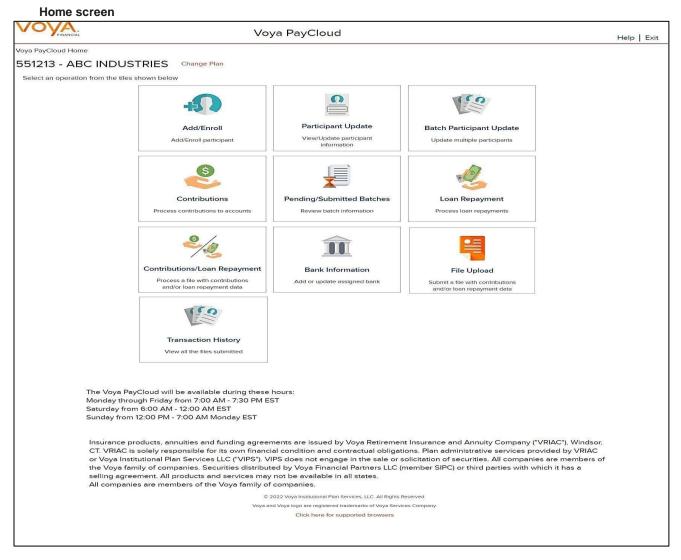
When Importing a Contributions/Loan Repayments File:

- 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 thefunding 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.



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

PINANELA	Voya PayCloud	Help E
a PayCloud Home > Edit Bank Information		
BC INDUSTRIES - 551213		
lease update the existing bank information as needed.		
Bank Name	Routing Number	
		0
Bank Address (Optional)	Confirm Routing Number	
Bank Address2 (Optional)	Account Number	
		0
Bank City	Confirm Account Number	
	The second state of the se	
Bank State	Account Type Saving	
Bank Zipcode(Optional)	Checking	
Bank Zipcode(Optional)		
Do not make more than one bank account change per business day as al date. Funding for future-dated scheduled batches comes from the bank that Vc		
Intended debit transaction.		
- If you have a need to utilize multiple bank accounts on a regular basis, co	intact Voya to discuss alternative solutions to your current process.	
- Updating the bank account will impact all contribution payments submitte will not be affected.	d today as well as pending contributions submitted after 4:00 p.m. the pri	ior business day, past payments for prior-invested transactions
- Prior to your first debit, please verify with your bank that 8602739614 is a	uthorized to debit your account.	
< Back	Continue	
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	Voya and Voya logo are registered trademarks of Voya Services Company.	

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.

Enter the bank's city.
Select the bank state from the drop - down list.
Enter the ZIP or postal code for the bank address.
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.
Re - enter the bank's routing 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.
Re - enter the bank's account number.
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.

Routing Number Account Number
Routing Number Account Number
GENOD-NO 100 3997775556-
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

			Voy	a PayClo	ouc	4		Help Ex
oya PayCloud Home > Bank	Information							
ARS ADVERTIS	SING, INC 551214							
nk Information is shown be	low for each division associated with you	ur plan. You r	nay add ne	w bank inform	atior	or edit existing ba	nk information for any division/	location shown.
		Search by:	Select	*	Se	arch	Q	
Division/Location Number 🔫	Division/Location Name 🔷	Bank N	ame 🔻	Account		Actions 🔷		
0001	MARS ADVERTISING, INC.	TestB	ank12345	Savings		Edit		
1001	MERCURY FULFILLMENT SYSTEMS, INC	TestB	ank12345	Savings		Edit		
1002	EMARKETING, LLC	TestB	ank 1 2345	Savings		Edit		
1003	ТРА, ШС	TestB	ank12345	Savings		Edit		
1004	TWIN OAKS, LLC	TestB	ank12345	Savings		Edit		
1005	MARS ADVERTISING, INC.	TestB	ank 1 2345	Savings		Edit		
1006	NOMADIC LLC	TestB	ank12345	Savings		Edit		
<	(Back			4	-	10 100 II 10		
		© 2021 Voy	ra Institutional F	lan Services, LLC.	All Rig	hts Reserved.		
						Services Company.		
			Click here for	or supported bro	owser	5		

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 8802739614 is authorized to debit your account.
Cancel Continue

Edit Bank Information Screen

Edit Bank Information screen

	Voya PayCloud	Help Exit
nya PayCloud Home > Edit Bank Information BC INDUSTRIES - 551213		
Please update the existing bank information as needed.		
Bank Name	Routing Number	
DCU_Test	211391825	0
Bank Address (Optional)	Confirm Routing Number	
Bank Address (Optional)	211391825	
	Account Number	
Bank Address2 (Optional)	44279999	0
Bank City	Confirm Account Number	
Marlborough	44279999	
Bank State	Account Type	
MA	Saving	
	Checking	
Bank Zipcode(Optional) 01752		
Do not make more than one bank account change per business day as all date. Funding for future-dated scheduled batches comes from the bank that Vointended debit transaction. If you have a need to utilize multiple bank accounts on a regular basis, core	ya has on record at the time that the investment is scheduled to take p	
 Updating the bank account will impact all contribution payments submittee will not be affected. 	d today as well as pending contributions submitted after $4.00\ \mathrm{p.m.}$ the	prior business day, past payments for prior-invested transactions
- Prior to your first debit, please verify with your bank that 8602739614 is a	thorized to debit your account.	
K Back	Continue	
	Voya and Voya logo are registered trademarks of Voya Services Company.	
	Click here for supported browsers	

- 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

VOYA.	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 SUE	3MIT.	
Bank Name	Routing Number	
DCU_Test	211391825	
Bank Address	Account Number	
Marlborough, MA 01752	44279999	
	Account Type	
	Checking	
< Back	Cancel Submit	
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	Voya and Voya logo are registered trademarks of Voya Services Company. Click here for supported browsers	

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

n pop-up
y Submitted
n established for your plan. All electronic detail files remitted to Voya will result in a debit from the designated bank account. NYSE will be used for same day processing.
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,

VOYA.	Voya PayCloud	Help Exit
/oya PayCloud Home> Bank Information Confirmati	on	
ABC INDUSTRIES - 551213		
Bank Information successfully creat	ted on 11/23/2021 at 12:26:42 PM.	🖶 Print
Bank Name	Routing Number	
JPMC	211391825	
Bank Address	Account Number	
Marlborough, MA 01752	44729999	
	Account Type	
	Checking	
	versor/Trustee acknowledges and affirms their agreement with terms and conditions previously agreed to regarding ACH Di at necessary to find the contributions stated in the payroll submission. I agree to abide by those terms and conditions and by m Voya's receipt of a written termination request.	
Prior to your first debit, please verify with your bank that 860	2739614 is authorized to debit your account.	
< Back	Go To Homepage	
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	Voya and Voya logo are registered trademarks of Voya Services Company.	
	Click here for supported browsers	

Screen Options

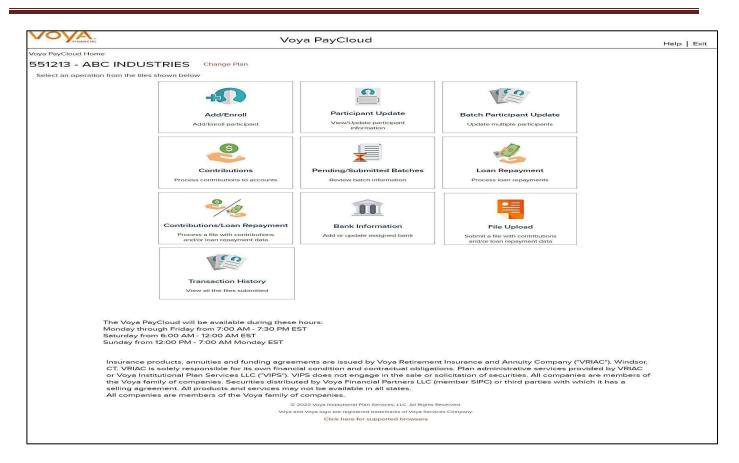
Click Go To Homepage to go to the Home screen

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



Reports selection screen

			Payro	oll Admini	stration					Help Exit
Payroll Administration Home > Report ABC INDUSTRIES - 5										
FBAK20130328-230333		-								🔒 Prin
ABC INDUSTRIES Bi-Weekly Deferral Change Report							Run Date 03/28/2013		Run Time 23:03:33	
						Search by:	Select	•	Search	Q
Nome	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						
< Back										
			© 2019 Voya Institutio							
		voy	a and Voya logo are re	ere for supported b		npany.				

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

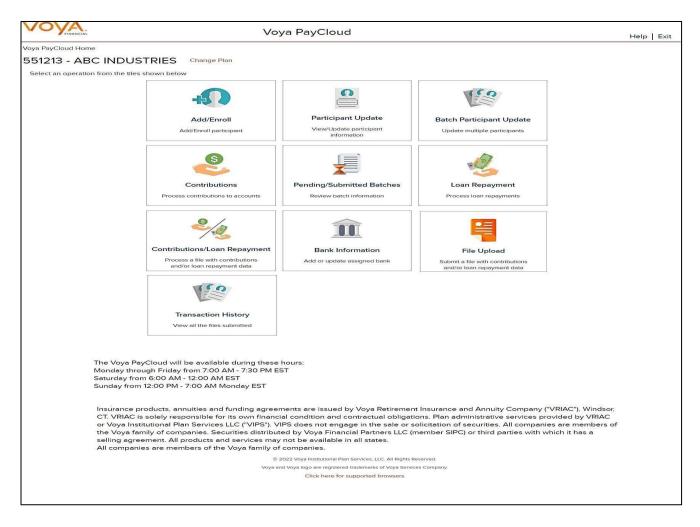
• Click Back to go to the Home screen

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



File Upload Screen

VOYA.		Voya PayCloud	Help Exit
Voya PayCloud Home > File Upload			
551213 - ABC INDUSTRIES			
File upload details for selected plan			
Select Division/Location		Data map	
0001 AON PEP	•	Select	
Select a File			
		Browse	
<u>8</u>			
Date of Payroll			
10/14/2022			
< Back		Continue	
for its own financial condition and con engage in the sale or solicitation of s	ntractual obligation: ecurities. All compa s a selling agreeme	re issued by Voya Retirement Insurance and Annuity Company ("VRIAC"), Windsor, s. Plan administrative services provided by VRIAC or Voya Institutional Plan Service nies are members of the Voya family of companies. Securities distributed by Voya I nt. All products and services may not be available in all states. nies.	s LLC ("VIPS"). VIPS does not
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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.

Screen Options

Click **OK** to be brought to the Transaction History screen. Refer to Transaction History section below for details.

Transaction History

Overview

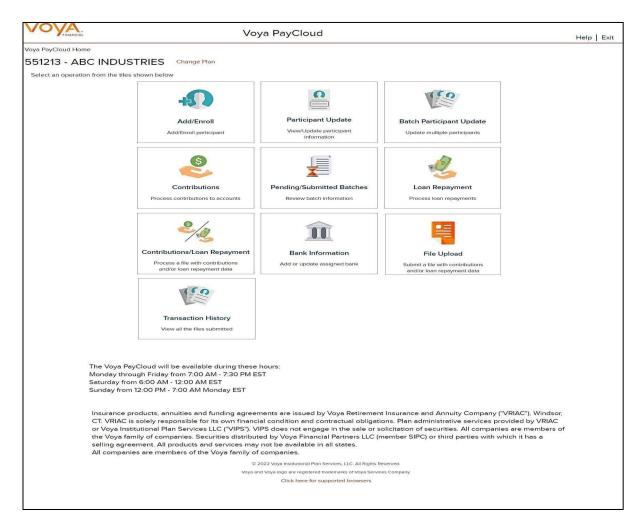
The Transaction History section of Voya PayCloud allows the user to view all File Uploads activity. Contribution files may be edited from this screen if they are not in a Submission in Progress or Submitted status.

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



Transaction History screen

01/01/2022			(iii)	End Date 02/08/2023		ė
Trensection Mode						
All		-	Refresh			
				Search by: Select	* Search	c
iubmitted 🔫	Peyroll Date 🛩	Transaction 😽 Mode	Transaction 💗 Type	Division/ Location 🛩	Status 🗢	
01/13/2023	01/13/2023	File Upload	Combined	CWR C&W	A File Processing Error	View Details I Delete
01/03/2023	01/03/2023	File Upload	Combined	CWR C&W	- Submitted	View Details
2/09/2022	12/09/2022	File Upload	Combined	CWR C&W	Submitted	View Details
2/09/2022	12/09/2022	File Upload	Combined	CWR C&W	-D Submitted	View Details
4					1 to 52 of 52	RC R Page 1 of 1
	< Beck					

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Fields

Field	Description
Search By	Search Options: 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. 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	Voya PayCloud		C	General Administration Help Exit		
Voya PayCloud Home > Tran	saction History > Error Details					
551213 - ABC INDUS	TRIES Change Plan					
		Search by:	Select 🔻	Search	Q	
Exclude Participar ALL	t ID 🔷 Participant Name 🗬	Error Message 🔷	Туре 🔷	Status 🔷 🛛 A	Action	
50106xx	HEWHIREH, HEWH	Error: 'TO' participant	Error	Needs Attention	Edit Records	
•		2			•	
< Back	Save	Print	Error/Warning Report	Submit With	Errors	
	© 2023 Vo	ya Institutional Plan Services, LLC. All R	ights Reserved.			

Fields

Field	Description
Search By	Search Options: 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 > Erro	r Details > Error Correction		
551213 - ABC INDUSTRIES Change Plan			
PARTICIPANT ID : 002669272			
	Field Name 🔷	Value 🔻	
	PhoneNum	7177206550	
	DefaultDeferralFlag	Y	
	BirthDate	19630215	\searrow
	DemographicEffectiveDate	20221019	
	EMailAddress	britness.fuat@test.com	
	AddrL3	SUNNYVIEW ESTATES	
	•		
	1 to 18 of	f 18 🔣 🧭 Page 1 of 1 🔁 刘	
< 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.