# Completing the New Payroll Spreadsheet

Frequently Asked Questions

Common Purpose. Uncommon Commitment.

To continue delivering increased value to you, we created an expanded payroll deposit (census) spreadsheet. It's immediately available—so you can begin using it today to help save time when completing your next census.

New Payroll Spreadsheet ▶ ▶ ▶

## Frequently Asked Questions

**Q. Why should I begin using this spreadsheet now?**
A. Transitioning to this spreadsheet now will make it easier for you in coming months. Rather than complete a census package at the end of your plan year, you'll only need to complete a short questionnaire. And using this new spreadsheet enables you to update employee information with every payroll, so addresses and other details can be updated before statements are produced.

**Q. What happens if I don't use the new template now?**
A. We believe it's in your best interest to get started now to reduce your effort at year end.

**Q. If this spreadsheet includes more information, how does it save me time?**
A. While this spreadsheet asks for additional information, providing it with each payroll prevents you from having to complete a census package at the end of your plan year. Instead, since you'll provide most of the census information throughout the year, you'll only need to complete a short census questionnaire.

**Q. Do I need to complete every field each time I send a deposit—even if I have no changes?**
A. Yes, each field should be completed with each payroll deposit.

**Q. Can I use the same excel spreadsheet and use a separate tab for each payroll?**
A. No, you'll want to have a unique spreadsheet for each submission. This helps avoid duplications and enables consistent processing for each payroll.

**Q. May I submit multiple plans in one deposit if I indicate each plan number on the spreadsheet?**
A. No, each deposit for a plan should remain separate as it is today. Every plan requires its own deposit, because participant information, eligibility, and other record keeping details are stored for each plan.

**Q. Are there any character requirements or limitations for the spreadsheet columns?**
A. Yes, in the Deposit/Census Spreadsheet Instructions you'll see column requirements.

**Q. Should I report census data on a year-to-date basis or with each payroll?**
A. It's in your best interest to report compensation and hours worked according to each pay period. At the same time, we'll obtain your year-to-date data for all employees, so our information is current to today's date.

**Q. Should I start calculating year-to-date census information from today moving forward, or should I go back to the beginning of the plan year?**
A. For this information to be accurate, you'll want to go back to the beginning of your plan year and include the true year-to-date data on your spreadsheet.

**Q. Do I need to include year-to-date information for ineligible employees?**
A. Yes, if you use the year-to-date method, you'll need to be consistent and provide this data for all employees—regardless of eligibility—throughout the plan year.

**Q. If an employee has multiple loans, how do I differentiate these on the spreadsheet?**
A. The new template has a loan number and a loan payment column. Each additional loan payment should be accompanied by its corresponding loan number.

**Q. How do I know what my business group, location, or Prior ER ID are?**
A. Some fields don't apply to all plans. If you have questions about whether a field on this spreadsheet applies to your plan(s), please contact us.

**Q. Should I provide an employee's personal or work email address?**
A. Please provide the employee's work email address.

**Q. Can I provide employee address updates through the deposit spreadsheet?**
A. It's best if you update employee information on BenefitsForYou.com, since this change would take effect immediately. Address changes can be submitted with your deposit spreadsheet—we'll automatically update our systems with the new information *only* during the month *prior* to your participant statement mailing.

**Q. Can I rearrange or delete columns that I'm not using and don't need?**
A. Absolutely! Columns may be rearranged to suit your preference, and any nonrequired fields that don't apply to your plan can be deleted. Please see the Deposit/Census Spreadsheet Instructions for a list of required fields.

## Tools

Spreadsheet Template

Deposit/Census Spreadsheet Instructions

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## Questions?

Please call us at 800.999.8786. We're here to help you succeed.



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