

Census Data Report for Voya 403b Administrator

<u>Column/Field on Report</u>	<u>Where Data Generates From in School Accounting System</u>
Employee SSN.....	Social Security Number (Federal ID) field on Employment screen in Employee File
Employee Number	Employee ID field on Name & Address screen in Employee File
Employee First Name	First Name field on Name & Address screen in Employee File
Employee Middle Name.....	Middle Name field on Name & Address screen in Employee File
Employee Last Name.....	Last Name field on Name & Address screen in Employee File
Street Address 1	Address 1 field on Name & Address screen in Employee File
Street Address 2	Address 2 field on Name & Address screen in Employee File
City.....	City field on Name & Address screen in Employee File
State.....	State/Province field on Name & Address screen in Employee File
Zip Code	Zip Code field on Name & Address screen in Employee File
Foreign State/Prov.....	State/Province field on Name & Address screen in Employee File, only if <u>not</u> in United States
Country	Country field on Name & Address screen in Employee File, only if <u>not</u> in United States
Gender	Gender field on Employment screen in Employee File
Birth Date	Birth Date field on Employment screen in Employee File
Home Phone	Primary Phone Number field on Name & Address screen in Employee File
Office Phone	Blank, unless user defined an Office Phone custom field and completed custom field in Employee File (Note: This field is <u>not</u> required in Census Data report.)
Office Phone Extension	Blank, unless user defined an Office Phone Extension custom field and completed custom field in Employee File (Note: This field is <u>not</u> required in Census Data report.)
Other Phone.....	Secondary Phone Number field on Name & Address screen in Employee File
Plan Status.....	Default Plan Status field on Report Options screen of 403b Reporting option, unless user defined a Plan Status custom field and completed custom field in Employee File; Plan Status codes are: A – Eligible Participating, X – Eligible Not Participating, or I – Ineligible (Note: User is able to select to include employees with plan status of X or I on the census data report; those with plan status A will always report.)
Plan Status Sub Type	Blank, unless user defined a Plan Status Sub Type custom field and completed custom field in Employee File; Plan Status Sub Type codes are: 1) if plan status = A, then blank or C – QDRO Court action pending; 2) if plan status = X, then blank; or 3) if plan status = I, then blank or Q – QDRO Recipient
Plan Status Date	Oldest Hire/Rehire Date in Employee Dates List on Employment screen in Employee File, unless user defined a Plan Status Date custom field and completed custom field in Employee File
Employment Status	Employee Status field on Name & Address screen in Employee File; Employment Status codes are: H – Hired, D – Deceased, P – Disabled, R – Retired, T – Terminated, or L – Leave of Absence
Employment (Status) Sub Type	Based on generated Employment Status if applicable (examples: 1) H employment status = O – Original employment status sub type if one Hire/Rehire Date entered in Employee File or R – Rehired employment status sub type if more than one Hire/Rehire Date entered; 2) R employment status = N – Normal employment status sub type; and 3) L employment status = A – Approved-Paid employment status sub type), unless user defined an Employment Status Sub Type custom field and completed custom field in Employee File; Employment Status Sub Type codes are: 1) if employment status = H, then O – Original or R – Rehired; 2) if employment status = R, then N – Normal, E – Early, or P – Postponed; 3) if employment status = L, then A – Approved-Paid, U – Approved-Unpaid, F – Family Medical Leave Act, or M – Military; or 4) if employment status = D, P, or T, then blank
Employment Status Date	Oldest Hire/Rehire Date field if only one Hire/Rehire Date is entered or most recent Hire/Rehire Date if more than one Hire/Rehire Date is entered (or Termination Date field, if status is Terminated or Deceased) in Employee Dates List on Employment screen in Employee File, unless user defined an Employment Status Date custom field and completed custom field
Hire Date.....	Oldest Hire/Rehire Date field on Employment screen in Employee File
Plan Entry Date.....	Oldest Hire/Rehire Date field on Employment screen in Employee File if plan status = X or A, unless user defined a Plan Entry Date custom field and completed custom field in Employee File; or blank if plan status = I
Currently Contributing	Based on generated Plan Status (Y – Contributing if plan status = A; or N – Not Contributing if plan status = X or I), unless user defined a Currently Contributing custom field and completed custom field in Employee File
Current Salary	Either calendar year-to-date totals or only totals from selected payroll batches (on Report Options screen) for the selected pay codes (on Gross Wages screen), depending on if user indicated to include the salary from all posted batches or not when accessing the Census Data screen
Vested.....	Y – Vested for all employees
Years of Service.....	Years of Service (Internal) field on Employment screen in Employee File, but rounded to nearest whole number