Voya 403b Administrator Setup

Define and complete the following custom fields (if applicable) prior to generating the Voya 403b report:

1) **Office Phone field** (as a text custom field) to track the employee's work phone number. (**Note:** This field is <u>not</u> required in the Voya Census Data report, so only define and complete this field if desired.)

2) **Office Phone Extension field** (as a text custom field) to track the employee's extension at work. (**Note:** This field is <u>not</u> required in the Voya Census Data report, so only define and complete this field if desired.)

3) **Plan Status field** (as a referenced custom field) to track the plan status for an employee, only if it is different from the default defined for the majority of the employees (the default is specified when generating the Voya 403b report). (**Note:** Plan Status codes are: A – Eligible Participating, X – Eligible Not Participating, or I – Ineligible.)

4) **Plan Status Sub Type field** (as a referenced custom field) to assign any employees a plan status sub type, if applicable. (**Note:** 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.)

5) **Plan Status Date field** (as a date custom field) to track the date the plan status and status sub type were effective, only if different than the oldest Hire/Rehire Date (as entered in the Employee Dates List on the Employment screen in the Employee File). (**Note:** For the initial report, this will be the oldest hire/rehire date for the employees, and will only need to be changed on future reports if their plan status and/or plan status sub type changes.)

6) **Employment Status Sub Type field** (as a referenced custom field) to track the appropriate employment status sub type if different from the default automatically assigned by the system, if applicable. The default employment status sub type is based on the employment status. Examples: 1) if the employment status is **H** for Hired and the employee has only one Hire/Rehire Date specified in the Employee File, then the employment status sub type automatically assigned is **O** for Original, or if the employee has more than one Hire/Rehire Date, then **R** for Rehired will be the employment status sub type; 2) if the employment status is **R** for Retired, then the employment status sub type automatically assigned is **N** for Normal; and 3) if the employment status is **L** for Leave of Absence, then the employment status sub type will be **A** for Approved-Paid. (**Note:** 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.)

7) **Employment Status Date field** (as a date custom field) to track the date which the employment status or employment status sub type was effective, only if different than the applicable date from the Employee Dates List on the Employment screen in the Employee File (oldest hire/rehire date if only one Hire/Rehire Date is entered or most recent hire/rehire date if more than one Hire/Rehire Date is entered, or the Termination Date if the employee's status is Terminated or Deceased). (**Note:** For the initial report, this will be the applicable hire/rehire date for the employees (or termination date, if status is Terminated or Deceased), and will only need to be changed on future reports if their employment status and/or employment status sub type changes.)

8) **Plan Entry Date field** (as a date custom field) to track the eligible date to participate in the plan, only if different than the oldest Hire/Rehire Date (as entered in the Employee Dates List on the Employment screen in the Employee File). (**Note:** The Plan Entry Date field is only generated on the Voya Census Data report if the plan status of the employee is A or X; otherwise, the field will be blank if the plan status is I. For the initial report, the Plan Entry Date for employees with a plan status of A or X will be the oldest hire/rehire date for the employees.)

9) **Currently Contributing field** (as a referenced custom field) to track whether or not the employee is currently contributing to the plan, only if different than the default. The default is based on the plan status generated for the employee (for example, Y – Contributing if plan status = A; or N – Not Contributing if plan status = X or I).