

# Voya PayCloud User Guide

February, 2022



## Copyright

Copyright 2021 Voya Institutional Plan Services, LLC.

All rights reserved. No part of this work may be produced or used in any form or by any means without the express written permission of the copyright owner.

All information in this document has been included for its instructional value. While every precaution has been taken with its preparation, the copyright owner does not offer any warranties or representations, nor does it accept any liability with respect to the information contained herein.

## Document Information

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

## REVISION HISTORY

Section	Update	Page
System Security	Removal of the section	14,15
Home	Update <b>Overview</b> for verbiage related to top navigation bar & appearance of Home screen on cancellation of an operation	16
	Update <b>Screen Options</b> for inclusion of Contributions/Loan Repayment File Processing tile	17
Plan Selection	Update <b>Overview</b> for the plan list containing more than 25 plans	18
	Update <b>Screen Options</b> for inclusion of Refresh & Next buttons	18
Batch Files & Templates	Removal of the section	29
Add/Enroll	Update <b>Fields</b> for- Inclusion of Default Enrollment	49
	Update <b>Contribution Elections Screen</b> for the inclusion of message for election of Morning Star Account program as part of the Default Enrollment	54
	Update <b>Investment Election Screen</b> for inclusion of the message regarding the Default Investment Option feature	56
	Update <b>Verify Information Screen - Screen messages</b> for inclusion of Default Investment Option feature	57
	Update <b>Screen Options for Verify Information screen</b> for the Inclusion of success message on Confirmation screen. Home screen removed	58
	Update <b>Screen Options for Confirmation screen</b>	59
	Under Add/Enroll Verify Information screen - changed the Screen option "Make change" to "Edit" Button	
	Inclusion of Import File section	
	Update <b>Fields under Participant Information</b> section for the removal of QDIA Default Enrollment	
	Inclusion of the <b>Default Enrollment field</b> under Optional Data – Fields for Enrollment Import Formatting Rules. Plan Selection screen -- Change Verbiage from "Next" to "More Plans" Added verbiage to Add enrollment -- verification screen -- Click Cancel to go to the Home Screen. Participant Information screen – QDIA Default Enrollment option -- Click Cancel to go to the Home Screen and Corrected "next to Continue	
Participant Update	Update <b>Fields</b> - Inclusion of Default Enrollment, <del>QDIA Default Enrollment</del> , MorningStar Managed Account Program	64
	Update <b>Contribution Elections Screen</b> for the inclusion of message for election of Morning Star Account program as part of the Default Enrollment	66
	Update <b>Investment Election Screen</b> for inclusion of the message regarding the Default Investment Option feature	67
	Update <b>Screen Options for Verify Information screen</b> for the Inclusion of success message on Confirmation screen Home screen removed	69
	Update <b>Screen Options for Confirmation screen</b> Under Participant Update Verify Information Screen- changed the Screen option "Make change" to "Edit" Button	70
	Update <b>Fields</b> for the removal of QDIA Default Enrollment	
Batch Participant Update	Update <b>Fields</b> - Inclusion of Hide Terminated Participants, Inclusion of Active & Ineligible participants	75
	Update <b>Screen Options for Verify Information screen</b> for the Inclusion of success message on Confirmation screen Home screen removed	77,78
	Update <b>Fields</b> – Update Help text for Active & Ineligible participants	83

	Inclusion of File Import section Inclusion of <b>Participants Screen</b> Existing Template Screen--Click Cancel to go to the Home Screen. Batch Participant Update Screen-- Selection option -- Click Cancel to go to the Home Screen Batch Participant Update screen -- Click Cancel to go to the Home Screen.	72-81 83-84
Contributions	<del>Update <b>Contributions Set Up</b> screen for the inclusion of <b>Profunded Account</b> feature</del>	80
	Update <b>Fields</b> under Contributions Set Up screen for the inclusion of Active & Ineligible participants, All participants, <del>Profunded Account Contribution</del> , Participant Account Contribution for <del>Profunded Account</del> feature, Updates to Sources [copy from previous batch], Display Participants with Contributions, Copy Payroll Data From	83-85
	<del>Update <b>Contributions Payroll Input</b> screen overview &amp; <b>Fields</b> for the inclusion <b>Profunded Account</b> feature.</del> Update <b>Screen Options</b> to navigate to Contributions Confirmation screen	85-88
	Update <b>Add/Delete Participant</b> screen for search, add & removal of participants, Update <b>Screen Options</b>	90,91
	Inclusion of <b>Contributions Confirmation</b> screen – <b>Screen Options</b>	92
	Inclusion of File Import section Update <b>Fields</b> – Update Help text for Active & Ineligible participants Inclusion of <b>Participants Screen</b>	96 99
	Inclusion of <b>Add Additional Participants Screen</b>	102
	Removal of <b>Participants &amp; Add Additional Participants</b> sections	
	Inclusion of text “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” under the <b>Fields</b> section for Contributions Payroll Input screen	
	Update <b>Fields</b> when ‘Upload a File’ option is selected on the Contributions Set Up screen Contributions Set Up screen with File Import not activated --Selection option --change verbiage from "Next" to "Continue"	
Pending/Submitted Batches	Update <b>Fields</b> to include Batch Type and Search By options	92
	<del>Update <b>Funding Details</b> screen for the inclusion of note regarding the <b>Profunded Account</b> offset &amp; <b>Fields</b> to include Payroll Calendar.</del> Update <b>Screen Options</b> to navigate to Confirmation screen, Home screen removed	92
	Update <b>Fields</b> for Forfeiture and <del>Profunded Account balance</del> & Payroll Calendar	109
	Inclusion of <b>Forfeiture and <del>Profunded Account Balance Fund Table</del></b> section	109
	Update <b>Screen Options</b> under Pending Batches Edit for relabeling Add/Delete Participants and including additional information	114
	Under Submitted Batches, Update verbiage from From the Batch Type dropdown, select Submitted Batches to display the client’s 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. To “From the Batch Type dropdown, 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.”	116
Pending/Submitted Batches	Under Overview, updated verbiage from "Contribution/Loan" to "Combined". Under Pending/Submitted Batches Screen updated verbiage from "Contribution/Loan" to "Combined". Under Pending/Submitted Batches --> Fields --> Batch Type --> updated verbiage from "Contribution/Loan" to "Combined". Pending Batches Submission Pop-Ups --> Pop-Up Screen Options, updated the verbiage for click "OK" button. Added verbiage "Click New Enrollment to go to the Add/Enroll Participant screen" to pending batch edit screen. Added Verbiage "Click Cancel to go to the Home Screen" to pending batch edit screen.	124,125,1 26,130
Loan Repayments	Update <b>Screen Options</b> under Loan Input screen to navigate to the Confirmation screen, Home screen removed	105
	Inclusion of File Import section	
	Inclusion of “Note : While Loan Payoff is available to all users, it may not be activated. Contact Voya for assistance.” Under Payment Amount	111

	Inclusion of <b>Participants Screen</b> Removal of <b>Participants Screen</b>	109
	Inclusion of <b>Add Additional Participants Screen</b> Removal of <b>Add Additional Participants Screen</b>	112
	Under Loan Import screen updated the screen option from Continue button to Save and Continue Button. Loan Repayment-- Create Template screen -- Added Click Cancel to go to the Home Screen	
Contributions/Loan Repayments File Processing	Inclusion of new section	107
	Inclusion of File Import section Update <b>Fields</b> – Update Help text for Active & Ineligible participants	117
	Update <b>Contributions/Loan Repayments Import Formatting Rules</b> to include the below: <ul style="list-style-type: none"> <li>• “Multiple Loans per participant may be submitted on a single file”</li> <li>• “Contributions and Loan Repayments can be included on the same spreadsheet”</li> </ul> Removed below: “File may contain multiple rows per Social Security Number and a maximum of three Loan Number and Loan Amount pairs per row” [based on business review for Contribution Import_Release 2.docx]	114
	Updates to <b>Data Fields and Formatting</b> <ul style="list-style-type: none"> <li>• Updated statement from “Repeat Social Security number for employees repaying multiple outstanding loans” to “Repeat Social Security number for employees repaying multiple outstanding loans when loans are listed on a separate row.”</li> <li>• Removed below points [based on business review for Contribution Import_Release2.docx] <ul style="list-style-type: none"> <li>○ Maintain ‘V – Voluntary’ as the default termination reason if a termination reason is not provided</li> <li>○ Issue error “SSN xxxxxxxx : Termination Reason was provided without a Termination Date” when Termination Date is not provided</li> </ul> </li> <li>• Added “Loan Number and Loan Amount must be submitted for each Loan Repayment.</li> </ul>	115
	Added <b>Participants Screen</b> section	118
	Added <b>Additional Participants Screen</b> section	120
	Updates to <b>Templates Screen &amp; Screen Options</b> section for labels and button names	117
	Inclusion of text “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” under the <b>Fields</b> section for Contributions/Loan Repayments Payroll Input screen	
	Update <b>Fields</b> when ‘Upload a File’ option is selected on the Contributions/Loan Repayments Set Up screen	
	Updates to <b>Contributions/Loan Repayments Import Formatting Rules &amp; Date Fields &amp; Formatting</b> from signed-off guide Contribution_Loan Import_Release 2	
	Under Contributions/Loan Repayments set up screen – Multiple Division Plan updated the screen option from Continue button to Save and Continue Button. Contributions/Loan Repayments set up screen – Multiple Division Plan-- Added Click Cancel to go to the Home Screen	
Bank Information	Update <b>Screen Options</b> for Bank Confirmation pop-up to navigate to the Confirmation screen	123 onwards
	Sentence ‘Informational messaging regarding adding or modifying the bank information has been added to the bottom of the screen’ changed to ‘Please review the policies and restrictions noted on the bottom of the Bank Information screen’. Additional updates in this section captured in ‘track notes’ & approved by business on 8/6	
Reports	Update <b>Screen Options</b> for navigation to Home screen	134
Sections - Add/Enroll, Batch Participant Update, Contributions, Contributions/Loan Repayments, Loan Repayments	Updated field name <ul style="list-style-type: none"> <li>• “Headers” to “How many top table rows (headers) would you like to remove?”</li> <li>• “Trailers” to “How many bottom table rows (trailers) would you like to remove?”</li> </ul> Updated field name	49,50,51, 77,78, 79,80,93, 94,104,105,115

	<ul style="list-style-type: none"> <li>• “How many top table rows (headers) would you like to remove” to “From top to bottom, how many rows would you like to remove?”</li> <li>• “How many bottom table rows (trailers) would you like to remove?” to “From bottom to top, how many rows would you like to remove?”</li> </ul>	
All sections	Change orange ‘icon’ to orange ‘arrow’ [as applicable]	

Section	Update	Page
Bank Information	Bank Information screen – Single division plan with no banking information Edit Bank Information screen Bank Information verification screen Bank Information Confirmation screen Bank Information screen – Multiple division plan with/without banking information <ul style="list-style-type: none"> <li>• Update Screen Options for the above screens</li> </ul>	125-116
Reports	Reports selection screen	118
Batch Participant Update	Batch Participant Import a File screen – Option 'Upload a File' selected Templates screen Create Template screen Templates - Verification screen Templates - Confirmation screen Batch Participant Import a File screen – Option 'Process Batch participant update manually' selected Field Selection screen Batch Participant Update Confirmation screen Create Column Headings Map column header screen Error Messages screen Error Message Details Batch Participant Update screen <ul style="list-style-type: none"> <li>• Update Screen Options for the above screens</li> </ul>	72-90
Pending/Submitted Batches	Pending or Submitted Batches Screen Pending Batches Edit - when status read “Contains Errors”. Pending Batches Edits - Contributions Screen. Submitted Batches - "Submitted Batches" Screen. Pending/Submitted Batches Print screen - "Batch Report Screen" Pending Batches Funding Details Screen (Remittance Screen) Funding Details Confirmation screen Pending / Submitted Batches Print Screen -- Sort Options screen	







## Contents

Home .....	11
Plan Selection .....	13
Add/Enroll .....	15
Participant Update .....	49
Batch Participant Update .....	66
Contributions .....	88
Pending/Submitted Batches .....	110
Loan Repayments .....	123
Contributions/Loan Repayment File Processing .....	144
Bank Information .....	169
Reports .....	180

# 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 your 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 (pg 77) & Loan Repayment Section (pg 99).
- 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 (pg44).
- Update demographic data for enrolled participants. Refer to Participant Update Section (pg57).
- Provide payroll funding via the Automated Clearing House (ACH). Refer to the Banking Information Section for additional detail (pg 107).

For more information, see *System Security Overview*

## Hints and Tips

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

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

## Hours of Availability

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

## Gaining Access to Voya PayCloud

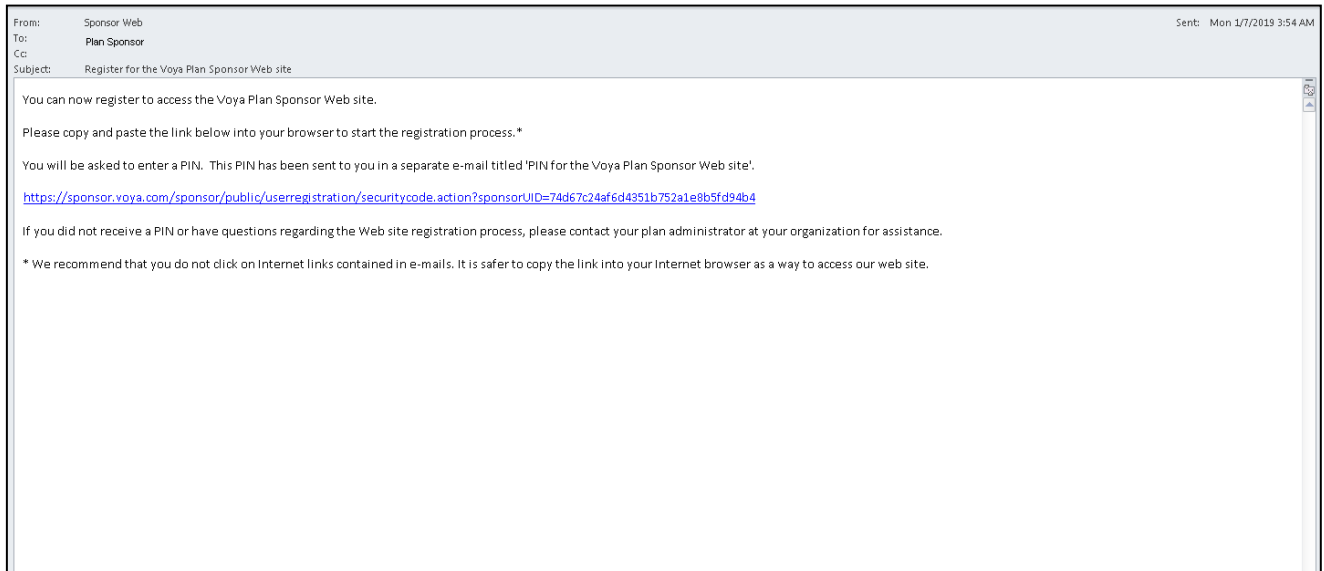
To access Voya PayCloud, you will be required to complete a Sponsor Web Activation Request form. Your Plan Manager will give you more details. See *Initial Registration Process* for more information. To deactivate a user ID and password, please contact your Plan Manager. Since Voya PayCloud allows you to access sensitive data, it is important to notify your record keeper immediately if a user ID should be terminated.

You will only be able to 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 if you have any questions regarding division access.

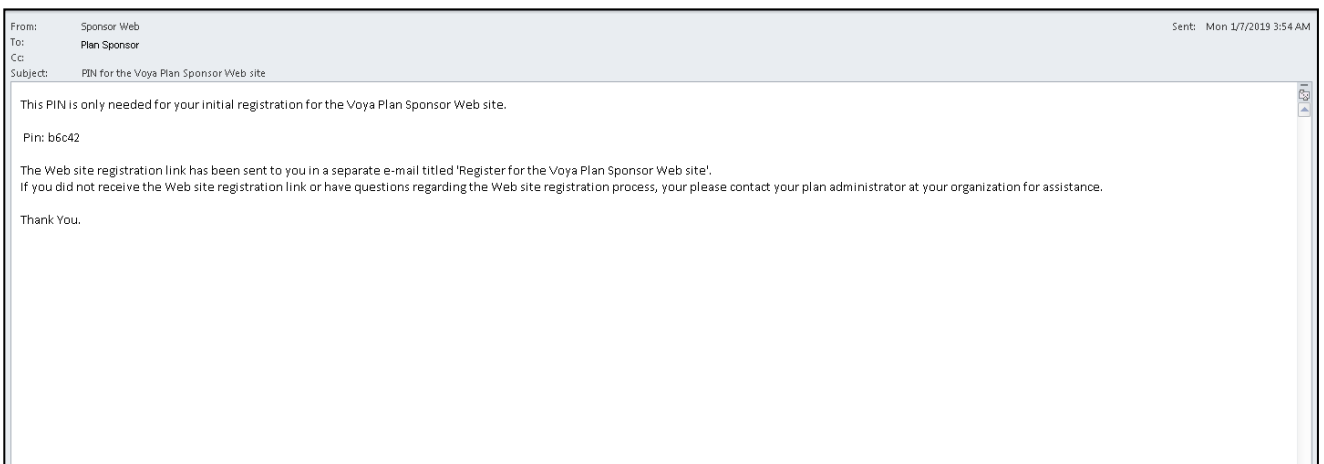
## Initial Registration Process

The steps below detail how you will proceed through the initial registration process and establish a profile for the Sponsor Web before you can reach Voya PayCloud.

1. After submitting a Sponsor Web Activation Form, you will receive an e-mail which will include a link to the registration site and instructions on how to begin the registration process.

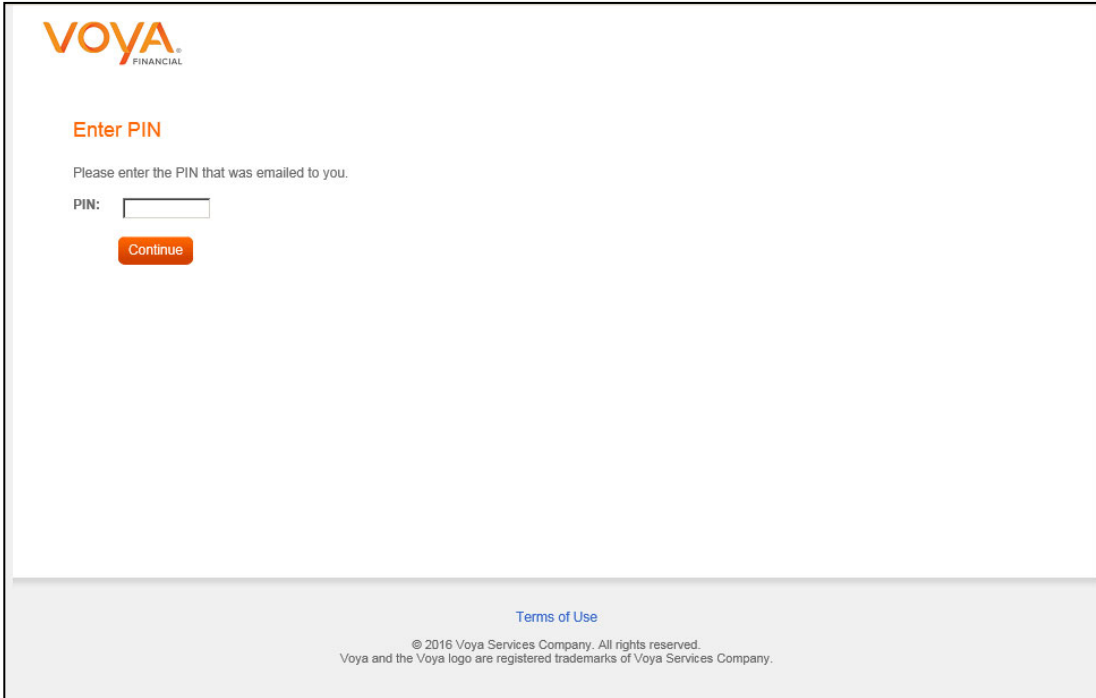


2. A second e-mail will be sent to you which will include the temporary PIN to enter on the registration site.



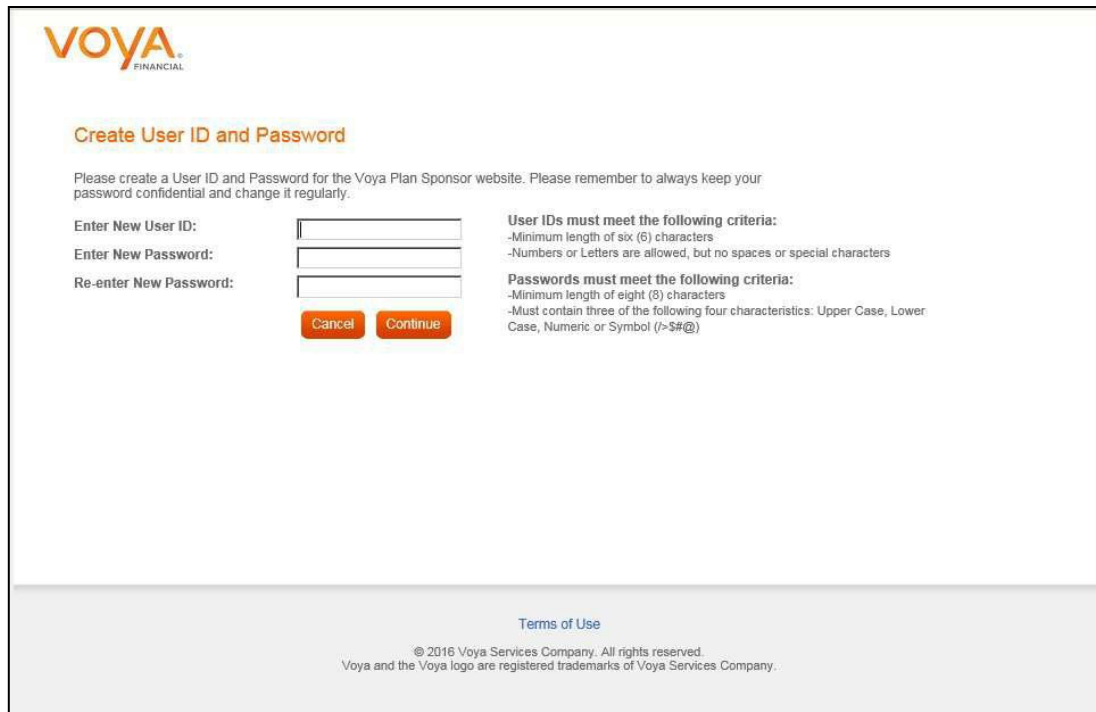
- Copy and paste the link from the first e-mail into a browser window to open the Sponsor New Registration screen and begin the registration process. Enter the PIN number on the initial screen and click **Continue** to proceed to Create User ID and Password screen.

**Enter PIN screen**



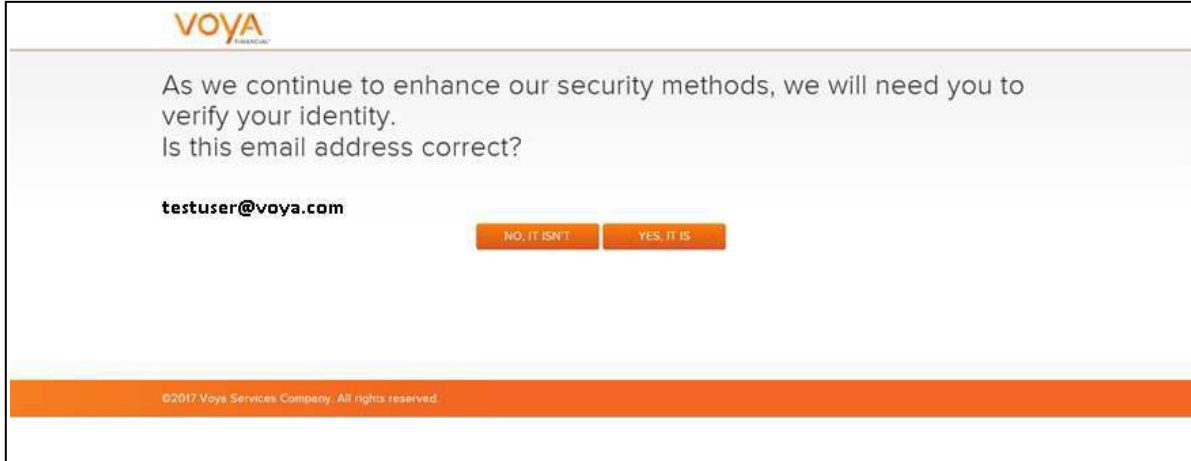
- On the Create User ID and Password screen, enter a User ID and Password. You must adhere to the required criteria listed in the right margin when constructing your user ID and password. Click **Continue**. A registration Confirmation email will be sent to your email address

**Create User ID and Password**



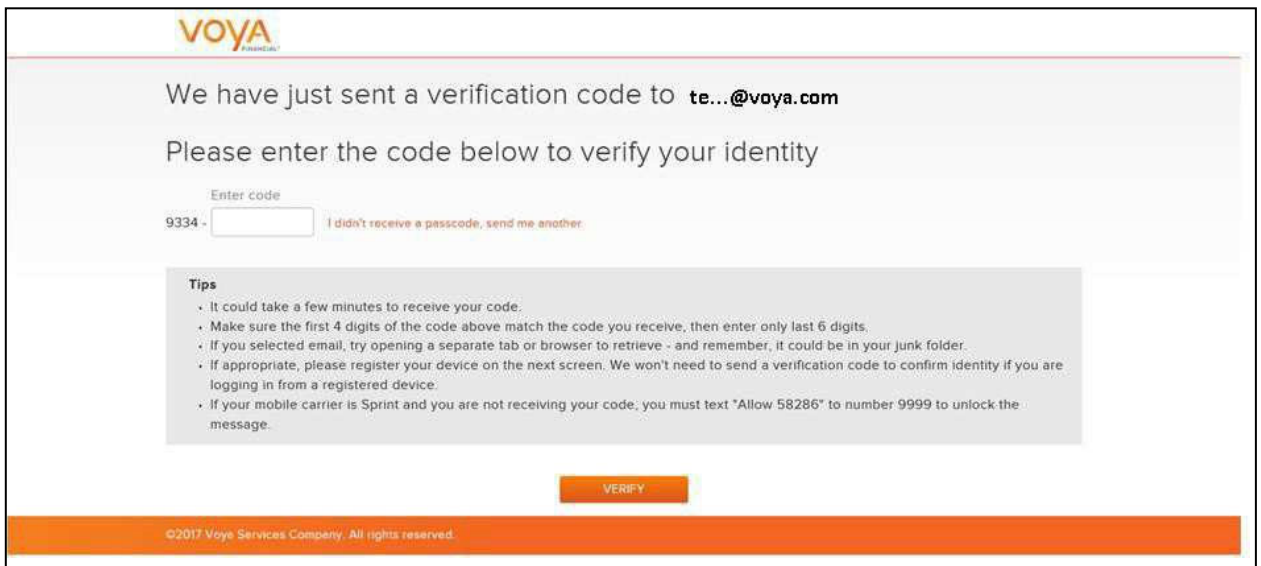
- Clicking **Continue** on Create User ID and Password screen will display the below screen. You will need to verify and confirm your email address. Clicking **YES, IT IS** will take you to Verification Code screen. A Voya Verification Code email will be sent to you. Clicking **NO, IT ISN'T** will take you to a screen with help desk contact number for email address update.

**Verify identity screen**



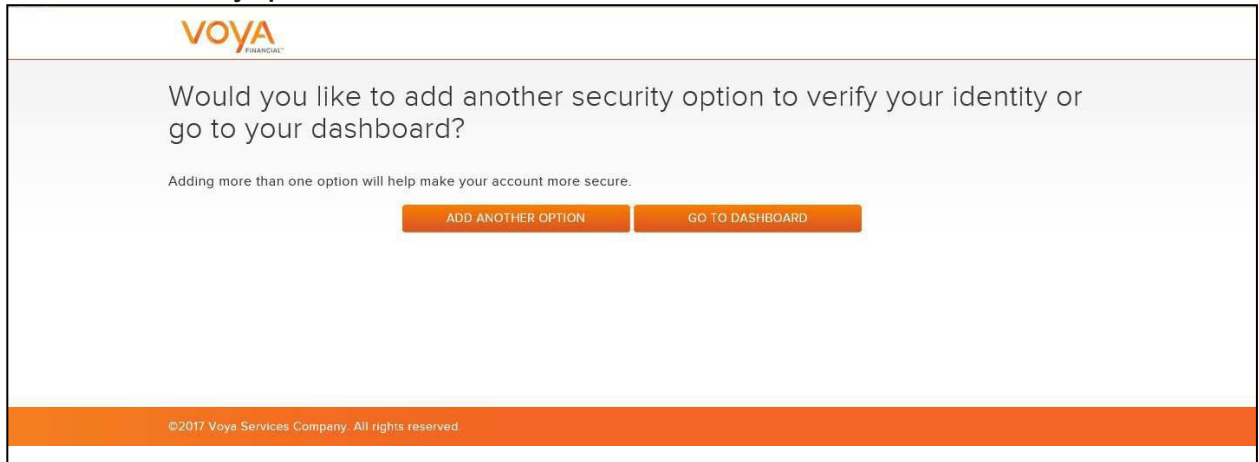
- On the Verification Code screen, enter the Verification Code and click **VERIFY**. You will be taken to a screen with options to add another security option to verify your identity or go to Dashboard

**Verification Code screen**



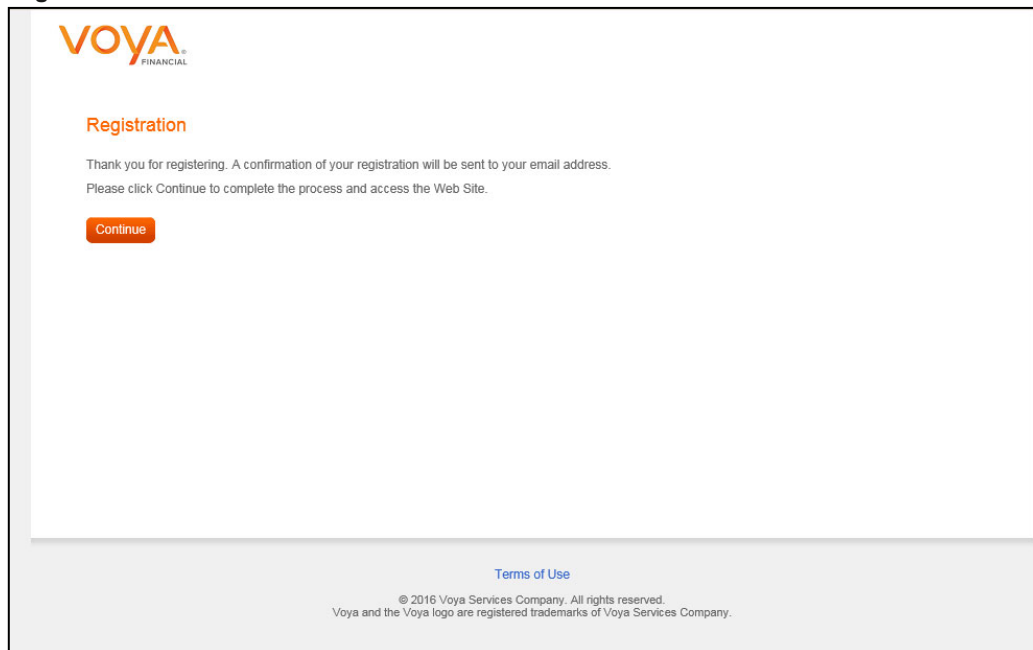
7. On the below screen, on clicking **GO TO DASHBOARD** will display a Registration Confirmation screen. Click **ADD ANOTHER OPTION** will take you to a screen with options i.e. Google Authenticator Option, Mobile for identity verification

#### Add another security option / Go to Dashboard screen



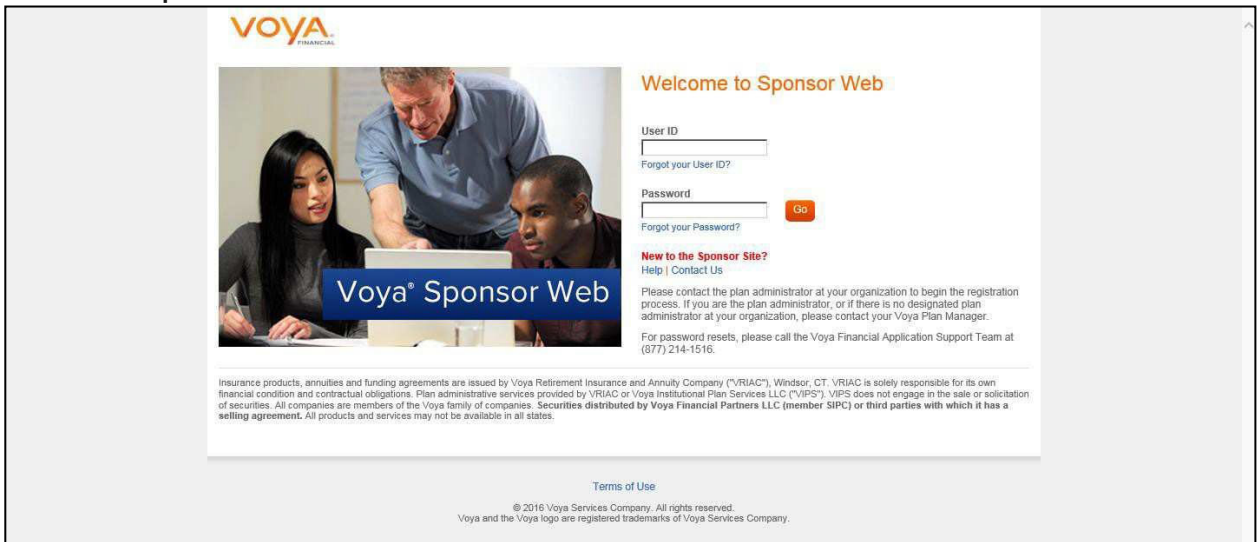
8. Click **Continue** on the Registration Confirmation screen to go to Welcome to Sponsor Webscreen.

#### Registration screen



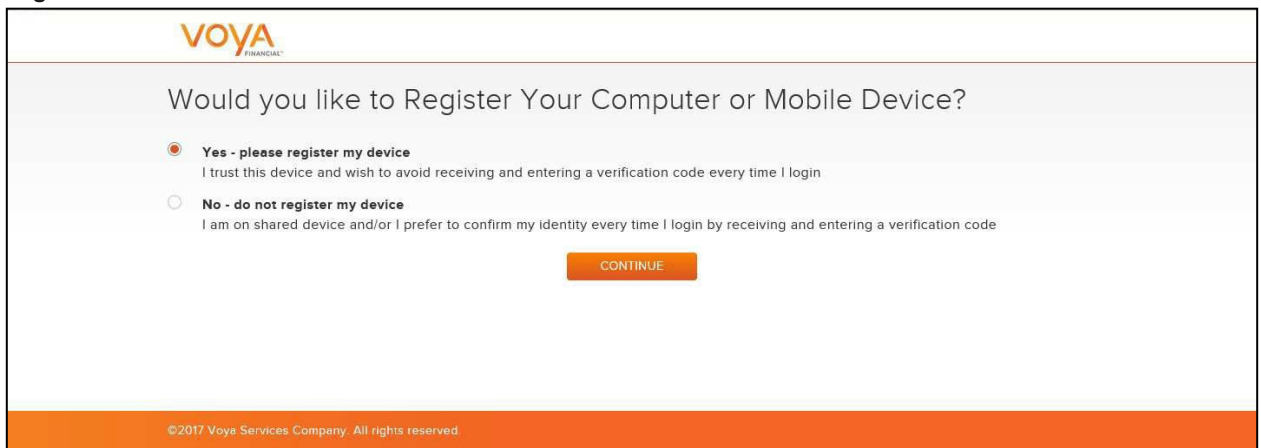
- On Welcome to Sponsor Web screen, log in with your User ID and Password. You will be presented with a Register Device screen

**Welcome to Sponsor Web screen**



- You can choose the options ‘Yes – please register my device’ or ‘No – do not register my device’ and click **Continue** to go to Sponsor Web Non-Disclosure and Information Security Agreement screen. If you choose the option ‘No’, you will receive a Verification Code on your registered email and will be taken to the Verification Code screen every time you log in with your User ID and Password to Sponsor Web.

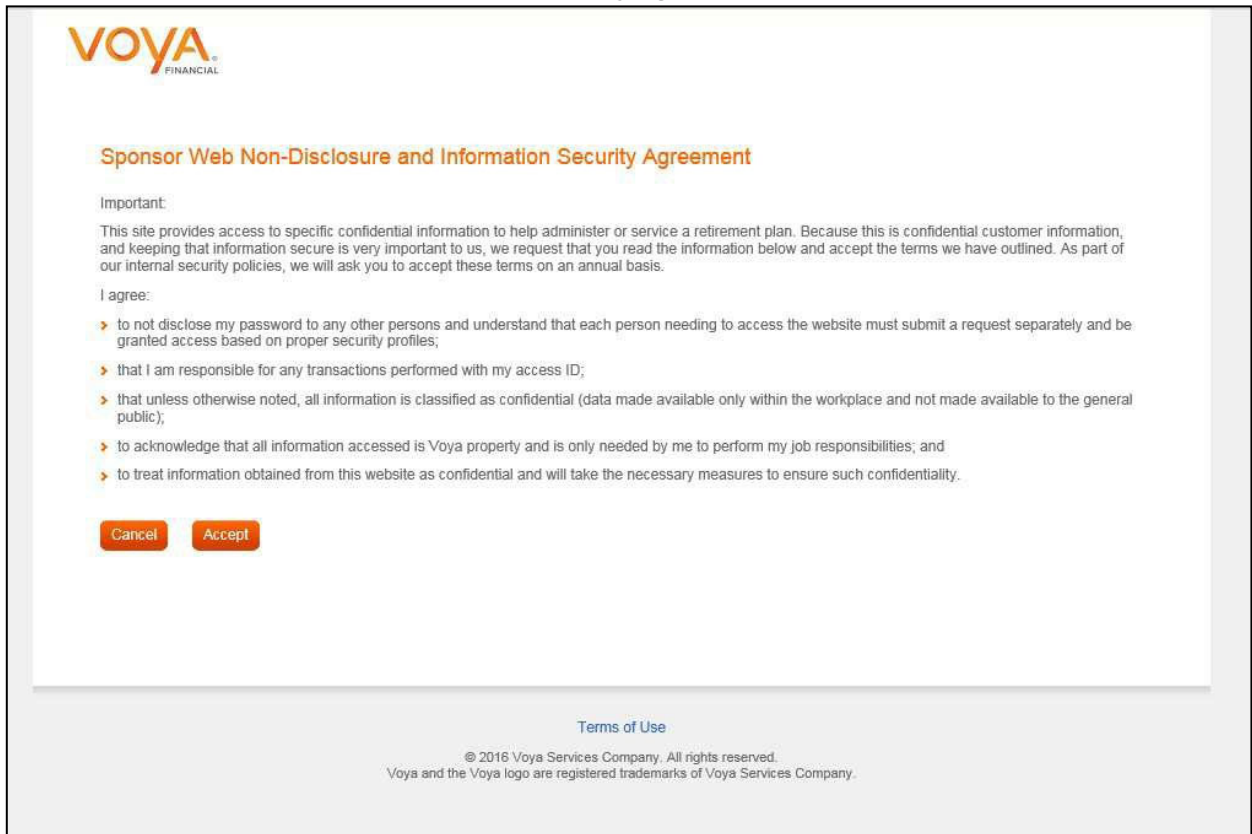
**Register Device screen**





- Click **Accept** on the Sponsor Web Non-Disclosure and Security Agreement screen to complete the registration.

#### Sponsor Web Non-Disclosure and Information Security Agreement screen



**VOYA**  
FINANCIAL

### Sponsor Web Non-Disclosure and Information Security Agreement

**Important:**

This site provides access to specific confidential information to help administer or service a retirement plan. Because this is confidential customer information, and keeping that information secure is very important to us, we request that you read the information below and accept the terms we have outlined. As part of our internal security policies, we will ask you to accept these terms on an annual basis.

I agree:

- ▶ to not disclose my password to any other persons and understand that each person needing to access the website must submit a request separately and be granted access based on proper security profiles;
- ▶ that I am responsible for any transactions performed with my access ID;
- ▶ that unless otherwise noted, all information is classified as confidential (data made available only within the workplace and not made available to the general public);
- ▶ to acknowledge that all information accessed is Voya property and is only needed by me to perform my job responsibilities; and
- ▶ to treat information obtained from this website as confidential and will take the necessary measures to ensure such confidentiality.

[Terms of Use](#)

© 2016 Voya Services Company. All rights reserved.  
Voya and the Voya logo are registered trademarks of Voya Services Company.

## Logging On to Voya PayCloud

### Sponsor Web Logon

This section describes how you will access the Sponsor Web after the *initial registration* process has been completed and a user ID, password and identity verification have been established. Plan Access is a function of Sponsor Web and requires that you log into this application first. To access Sponsor Web, open an Internet Browser such as Internet Explorer or Chrome.

- Use the following URL to access Sponsor Web: <https://sponsor.voya.com>. You will see the Sponsor Web login page.
- Click on **Sponsor Web Login**.
- Enter your user ID and password and then click **Go** to continue. If you are logging in from a non-registered device you will be prompted to enter the Verification Code received on your registered email address for entering the site.



**Note:** Sponsor Web user IDs cannot be shared between users. Each user needs their own unique user ID and password. If you have any questions about logging in, contact your Sponsor Web support staff.

Sponsor Web Login screen

**VOYA**  
FINANCIAL

**Welcome to Sponsor Web**

User ID  
  
[Forgot your User ID?](#)

Password  
 **Go**  
[Forgot your Password?](#)

**New to the Sponsor Site?**  
[Help](#) | [Contact Us](#)

Please contact the plan administrator at your organization to begin the registration process. If you are the plan administrator, or if there is no designated plan administrator at your organization, please contact your Voya Plan Manager.

For password resets, please call the Voya Financial Application Support Team at (877) 234-1516.

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

[Terms of Use](#)

© 2016 Voya Services Company. All rights reserved.  
 Voya and the Voya logo are registered trademarks of Voya Services Company.

Sponsor Web Home screen

**VOYA**  
FINANCIAL

[Home](#) | [Profile](#) | [Help](#) | [Contact Us](#) | [Report Card](#) | [Logout](#)

Welcome **TestPayAdminUser** | Your last login: 01/25/2019 at 08:43 AM EST

**RELATIONSHIP SUMMARY**

[Plan Health](#)

**Your Plan List**

Total Defined Contribution Plans: 10  
 Total Relationship Balance: \$3,626,915,254.80

Plan Name	Plan Number	Participants	Total Balance	YTD Contributions
Retirement Savings Plan 1	666238	26	\$681,963.43	\$0.00
Retirement Savings Plan 2	666238	152	\$1,674,023.63	\$0.00
Retirement Savings Plan 3	666986	47,382	\$3,203,613,453.30	\$1,000.00
Retirement Savings Plan 4	771129	141	\$5,986,940.31	\$200.00

[Set-Up Top Plans](#) | [View All Plans](#) | [View All Investments](#) | [View All Participants >>](#)

**Search**

By Participant  By Plan

Last Name  First Name

OR

SSN (last 4 digits)  
 xxx - xx -

Partial strings at a minimum of 4 characters may result in a higher number of responses.

**Search**

**News Center**

[View All News >>](#)

[Terms of Use](#)

© 2016 Voya Services Company. All rights reserved.  
 Voya and the Voya logo are registered trademarks of Voya Services Company.

4. Access a specific plan from the Home page by clicking on the plan name in the Relationship Summary or performing a quick search using the plan name or number.

After you select the plan you will see the Plan Summary dashboard.

**Plan Summary screen**

The screenshot displays the VOA Plan Summary screen for 'Retirement Savings Plan 1 - 66666'. At the top, there is a navigation bar with tabs: Relationship Summary, Plan Info, Participant Info, Reports, Processing Center, Investment Info, and Resources & Forms. Below this, a sub-navigation bar includes links for Contribution Submission and Payroll Feedback. The main content area is titled 'Plan Summary' and includes a table of plan details:

Address C/o Fred Cox 818 W Riverside, Ste. 800 Spokane, WA 99201	Contract Issue 05/14/2004 Plan Year End 12/31	Total Participants 20 Plan Type 403(b)(1)	Primary Contact OwnerFirst OwnerLast
---	--	--	---

Below the table is a 'Balance Information' section with a table:

Balance (Allocated)	\$254,153.57
Loan Balance	\$4,647.68
<b>Total Balance</b>	<b>\$258,801.25</b>

To the right of the table is a pie chart titled 'Balance By Source of Money' showing two categories: EMPLOYEE PRETAX II (\$252,464.70) and EE PRETAX BASIC MATCHED I (\$1,088.87). Below the chart is a 'Show Results By' selector set to '\$'.

At the bottom of the dashboard, there are two sections: 'Search' and 'Quick Links'. The 'Search' section has radio buttons for 'By Participant' (selected) and 'By Plan', and input fields for Last Name, First Name, OR, and SSN (last 4 digits). The 'Quick Links' section has two columns: 'Reports' with links for 'Loan Monitoring - Delinquent Loans Report' and 'Loan Monitoring - Missed First Loan Payment Report', and 'Plan links' with links for 'Contribution Submission' and 'Payroll Feedback File'.

You can click **Contribution Submission** link either under the Processing Center or from **Quick Links** Section to go to Contribution Submission screen.

5. Click **Voya PayCloud** link on the Contribution Submission screen. You will go directly to your plan's Home screen on the Voya PayCloud application.

### Contribution Submission screen

**VOYA** FINANCIAL Plan Info ▾ Participant Info ▾ Reports Processing Center ▾ Investment Info ▾ Resources & Forms ▾ ERISA Services ▾

Homepage > Processing Center > Contribution Submission

Automated remittance processing makes sure your contributions are processed quickly, accurately and efficiently, every time.

- [Voya PayCloud](#)  
This electronic payroll interface automatically reconciles the data you provide with our record keeping system, giving you control over payroll contribution processing accuracy.
- [Internet File Transfer \(IFT\)](#)  
Sending your contribution data is easier than ever. IFT gives you the ability to send files, in a pre-approved format, with no additional software or cost. Once your account has been set up, all you need is access to the internet, and with a few clicks of your mouse, your data will be sent securely to us for processing. This method is suitable for any size plan.
- [Online Payroll Submission \(OPS\)](#)  
Allows you access to previously submitted remittance information. Once your account has been set up, you may choose to modify the previous contribution, loan and/or hour information by participant, or submit the payroll information as is for the current period and submit to us automatically and securely. This method is best suited for small to medium size plans.

Below are some materials that may help you use the Voya PayCloud tool. The material is specifically for Sponsors using the Voya PayCloud tool to remit contributions. To view these items, click on the names below.

[Voya PayCloud User Guide](#)  
[Voya PayCloud Quick Start Guide](#)  
[Voya PayCloud Webinar](#)

**Note :** Browser popup blockers should be disabled to run the Voya PayCloud application. Once in the Voya PayCloud application, your user ID and password will determine which retirement plan(s) and division(s) you may access. Contact your Account Manager with any questions regarding login.

# Home

## Overview

The Home screen 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 on the Voya PayCloud link on the top navigation bar. The Home screen will also appear as a default screen once an operation has been cancelled. Information regarding the availability hours of the Voya PayCloud system is displayed at the bottom of the screen.

## Home screen

VOYA  
FINANCIAL






Voya PayCloud

Help | Exit

Voya PayCloud Home

ABC INDUSTRIES - 551213 [Change Plan](#)

Select an operation from the tiles shown below

 <p><b>Add/Enroll</b> Add/Enroll participant</p>	 <p><b>Contributions</b> Process contributions to accounts</p>	 <p><b>Pending/Submitted Batches</b> Review batch information</p>
 <p><b>Bank Information</b> Add or update assigned bank</p>	 <p><b>Administration</b> Review and update your settings</p>	

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

© 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](#)

## 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

- 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 **Reports** to go to the Reports screen to view the generated reports for participant changes on contribution deferral percent

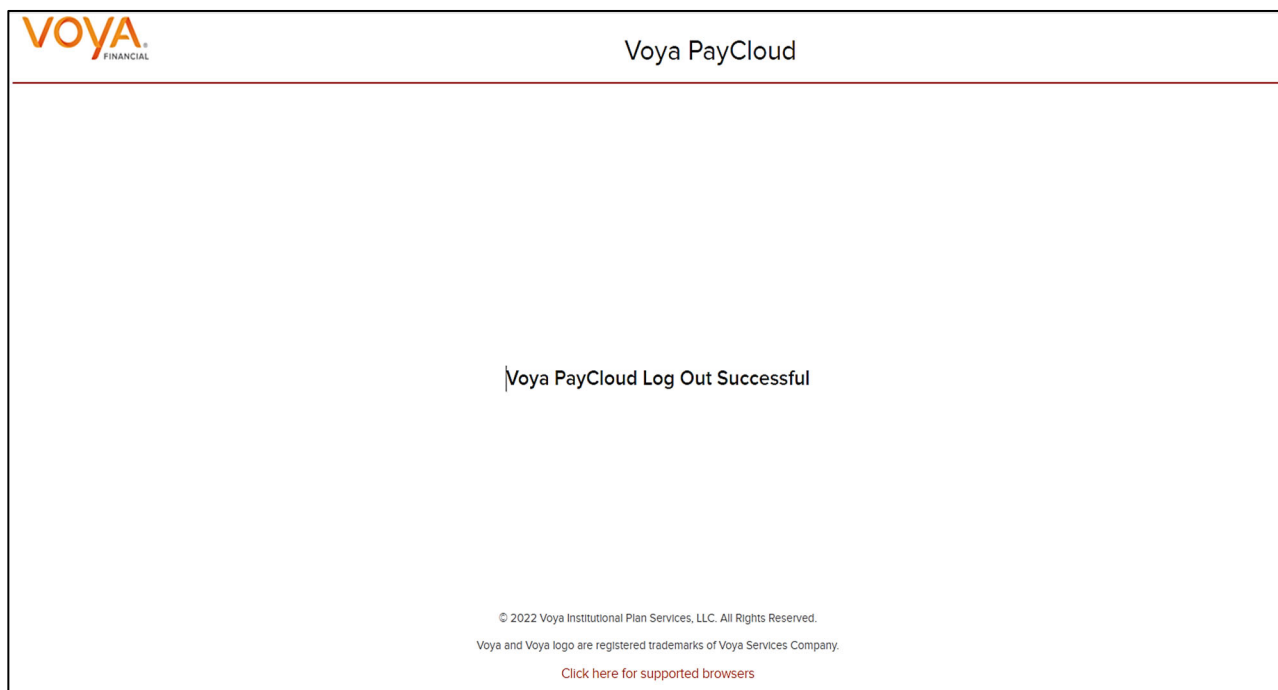
**Note:** The **Change Plan** link displays only if the user has access to more than one plan within Voya PayCloud.

## Help

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

## Logging Off

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



# Plan Selection

## Overview

The Plan Selection screen provides a list of plans accessible to the user. If the plan list contains more than 25 plans, you will be provided with the option to search for a plan by Plan Number or Plan Name. You can also click on a plan from the plan list to go to the Home screen for the plan.

### Plan Selection screen

Select Plan to Load

Search by: Plan Number Search

Plan Number	Plan Name
102938	Framework 2016 TPA
111102	MS Test Plan 1
111A01	Map Select TPA plan
111A02	Map Select TPA plan
135790	NEW PLAN
240001	Map Select 2016
246800	NEW PLAN
263007	KERN COUNTY CA
300JJ1	Voya Select Advantage IRA
303034	Tracey Test 74 part 2
428764	HRA test plan
428765	TRUSTEES OF NOLHGA
457861	HRA test plan
458127	IGRIF NAV AUV Logic Check
459621	CUSTOMCHOICEBLEND II
478564	HRA test plan
487512	TRUSTEES OF NOLHGA
501501	SUPERNOVA
501502	ING U.S. SAVINGS PLAN AND

1 to 100 of 7,391     Page 1 of 74

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

© 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](#)

## Screen Options

- You may select to search by Plan Number or Plan Name
- Enter either the exact or partial Plan Number/Name and click enter
- You will then be able to select from the list provided to go to the Home screen for the plan
- Click **Back** to go to the Home screen for the previously selected plan



**Note:** The pagination options are available only when the plan list contains more than 25 plans

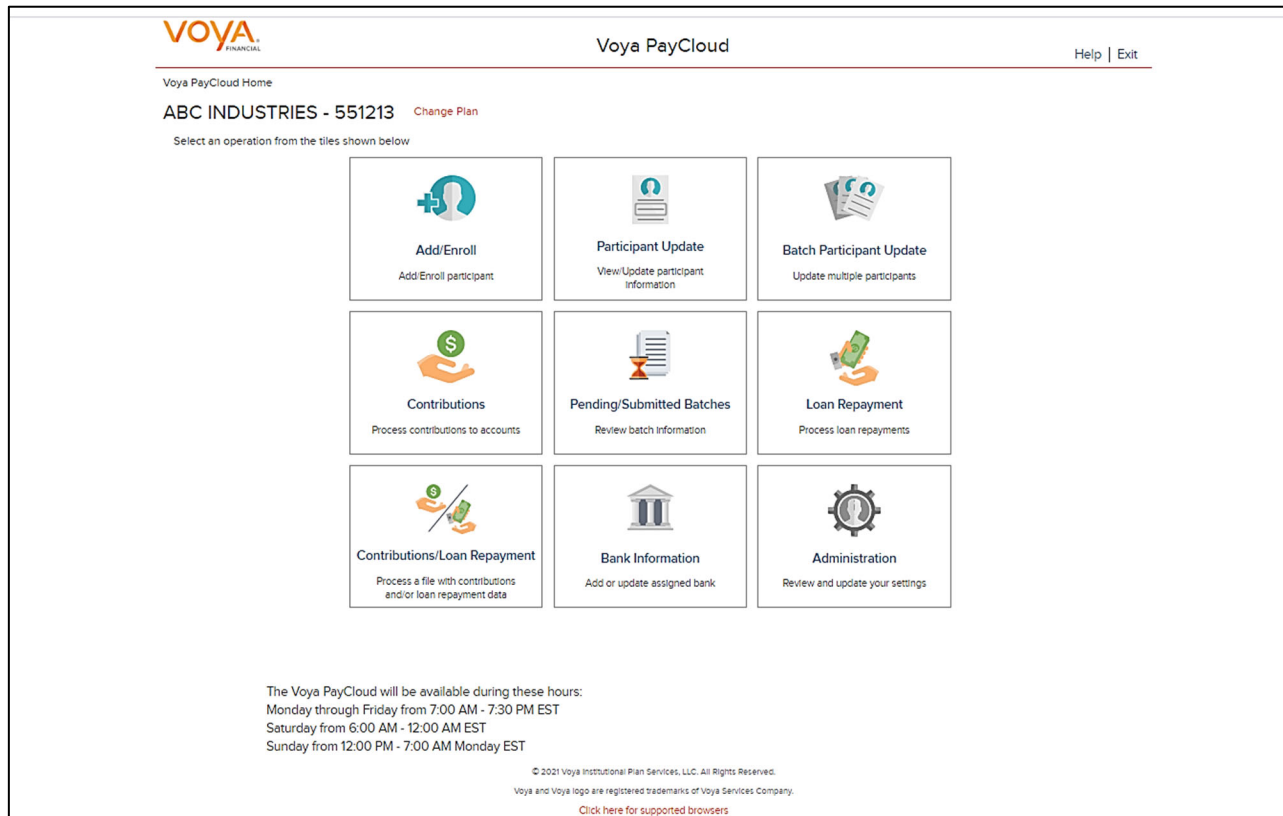


# Add/Enroll

## 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 or Enroll participant manually’ selected

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.

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

© 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

- 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 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...](#)

[View Sample File for formatting instructions](#)

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

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Screen Options

- Click **Browse** to select 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 .xslm)
- 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.
	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 Name Change**

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

Address Line 1	Maximum 40 characters.
Address Line 2	Maximum 40 characters.
City	Maximum 28 characters.
State Code	2 characters are required if the country is USA or Canada.
Postal Code	Applicable only if country is USA or Canada. USA ZIP codes may consist of 5 or 9 digits (no dashes). Canadian postal codes contain 6 characters.

**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**

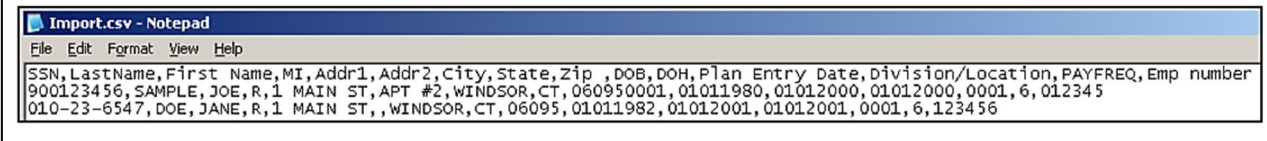
Accumulate option (special set-up required). The amount submitted is added to the existing total.

Actual hours, plan year-to-date (for vesting purposes)	Hours must be submitted in whole numbers and must not exceed four digits.
Anniversary hours (for plan eligibility rules)	Accumulate option (special set-up required). The amount submitted is added to the existing total. Hours must be submitted in whole numbers and must not exceed four digits.
Current Hours (plan year or anniversary hours)	Accumulate option (special set-up required). The amount submitted will add to the total that exists on the system.
	Hours must be submitted in whole numbers and must not exceed 3 digits.
Annual Salary	Do not include dollar signs or commas (for example: 45000.00). Submit in whole percentages only. Special set-up required for fractional amounts.
Deferral Amount	Must include decimal point, limit to two digits after the decimal.
	Do not include % or commas. Example: 250.00.
	Submit in whole percentages only. Special set-up required for fractional amounts.
Deferral Percentage (if required by your plan)	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%.
Investment Elections	Submit in whole percentages only. Special set-up required for fractional amounts.
	Must include decimal point; limited to two digits after the decimal.
	Do not include % symbol (for example 10.00, 50.00, 40.00).
	Investment Elections must total 100.00%.
Eligibility Exclusion	One character Y - Exclude participant from eligibility N (or blank) - Process participant for eligibility.
	Default Enrollment
QDIA Default Enrollment	Formatted as one character. <ul style="list-style-type: none"> <li>(Y) - Enroll participant into the plan's QDIA option</li> <li>(N) or blank – Enroll participant using investment fund supplied on file</li> </ul>
	Employee Number
Gender	One character format: 1 - Male 2 - Female
Marital Status	One character format: 1 - Single 2 - Married

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

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

Enrollment Import File Sample in MS Excel Format



## 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	<p>Must be nine digits.</p> <p>Leading zeros must be included.</p> <p>Acceptable formats: 999-99-9999 or 999999999.</p> <p>If the Social Security number format does not contain hyphens, make sure that the field is formatted as text. In MS-Excel, a green triangle indicates that you have stored values as text.</p>
Full Name	<p>Separate fields/columns are required for Last Name, First Name and Middle Initial.</p> <p>Last Name+ First Name + and Middle Initial fields cannot exceed 30 characters when combined.</p>
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	<p>Applicable only if country is USA or Canada.</p> <p>USA ZIP codes may consist of 5 or 9 digits (no dashes).</p> <p>Canadian postal codes contain 6 characters.</p>
Birth Date	<p>Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY.</p> <p>Eight digits are required.</p> <p>Leading zeros in months must be included. For example, 02 for February, not 2.</p> <p>Employee must be between 15 and 75 years of age for employment.</p>
Hire Date	<p>Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY.</p> <p>Eight digits are required.</p> <p>Leading zeros in months must be included.</p>

Plan Entry Date	Defaults to the current date
Termination Date	Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY Eight digits required-Lead zero in months must be maintained
Termination Reason	Must include one of the following valid values: V - Voluntary 1 – With Cause 2 – Laid Off 3 – Special 4 – Retirement 5 – Permanent Disability 6 – Death
Anniversary hours (for plan eligibility rules)	Overlay method-Values should be accumulated Hours must be submitted in whole numbers and must not exceed 4 digits.
Current Hours (plan year or anniversary hours)	Accumulate option (special set-up required). The amount submitted will add to the total that exists on the system Hours must be submitted in whole numbers and must not exceed 3 digits
Eligibility Exclusion	One character
	Y - Exclude participant from eligibility N (or blank) - Process participant for eligibility.
<b>Vesting Information</b>	
Actual hours, plan year-to-date (for vesting purposes)	Overlay method – values should be accumulated year-to-date. Hours must be submitted in whole numbers and must not exceed four digits.
Current Hours (plan year or anniversary hours)	Accumulate option (special set-up is required). The amount submitted is added to the existing total.
	Hours must be submitted in whole numbers and must not exceed three digits.
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 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
<b>Payroll Remittance</b>	
Division Codes	Four-digit division code. If you receive the error “Participant not in authorized division/location”, please validate the





- Verify participant’s account balances prior to submitting adjustments with negative values. Accounts are subject to change and market value fluctuation.
- Confirm that all employees on the spreadsheet are entered into the system and that the enrollment process is complete.
- Loans can be included on the same spreadsheet, but will need to be imported separately using the Loan Repayment function. A stand-alone spreadsheet for loan repayments is required if a participant repays more than one loan number at a time. To see an example of this, click the Loan View Sample File PDF link on the Loan Repayment Import screen.
- Import multiple payroll dates separately.
- If there are header/trailer lines, they must be identified when creating the template. Rows must be consecutive. Remove any blank rows.

## Data Fields and Formatting

All fields/cells should be formatted as text.

Social Security Number	<p>Must be nine digits.</p> <p>Leading zeros must be included.</p> <p>Acceptable formats: 999-99-9999 or 999999999.</p> <p>If the Social Security number format does not contain hyphens, make sure that the field is formatted as text. In MS-Excel, a green triangle indicates that you have stored values as text.</p>
Participant Name	Not required
Contribution Source Columns	<p>If the file does not contain decimals (values are implicit—see below), check the box labeled “Check this box if dollar amounts in the file do not have decimal points” when mapping.</p> <p>Do not include dollar signs or commas.</p> <p>Acceptable formats can either be:</p> <ul style="list-style-type: none"> <li>• Explicit: 999.99</li> <li>• Implicit: 99999 (the two rightmost digits are cents)</li> </ul>
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.
Actual hours, plan year-to-date (for vesting purposes)	<ul style="list-style-type: none"> <li>• Overlay method – values should be accumulated year-to-date.</li> <li>• Hours must be submitted in whole numbers and must not exceed four digits.</li> </ul>
Anniversary Hours (for plan eligibility rules)	<ul style="list-style-type: none"> <li>• Overlay method – values should be accumulated year-to-date.</li> <li>• Hours must be submitted in whole numbers and must not exceed four digits.</li> </ul>
Current Hours (plan year or anniversary hours)	<ul style="list-style-type: none"> <li>• Accumulate option (special set-up required). The amount submitted is added to the existing total.</li> <li>• Hours must be submitted in whole numbers and must not exceed three digits.</li> </ul>
Termination Date	<ul style="list-style-type: none"> <li>• Acceptable formats: MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY</li> <li>• Eight digits required-Lead zero in months must be maintained</li> </ul>

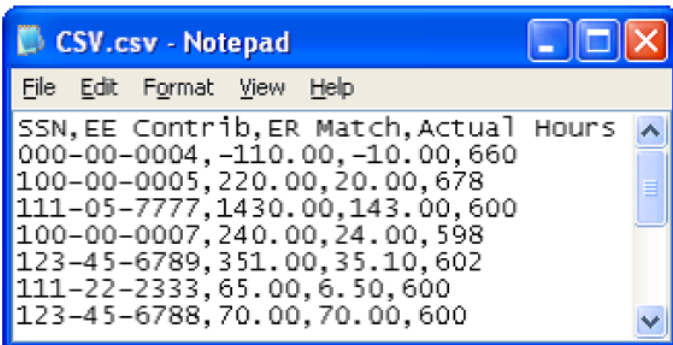
Termination Reason

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

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

Contribution Import File Sample in MS Excel Format



Contribution Import File Sample in .CSV Format

## Loan Repayment Import Formatting Rules

- All fields/cells should be formatted as text.
- In MS-Excel; a green triangle indicator in the cell signifies that you have stored values as text.
- Comma Separated File (\*.CSV)-Files must be comma delimited. Quotation marks must be removed from any values containing either single ( ' ') or double quotation ( " ") prior to being imported.
- Fixed width files are acceptable. The same formatting rules apply to each field as Excel or (\*.CSV).
- Contributions can be included on the same spreadsheet as loans, but will need to be imported separately using the Contribution function. For an example of this, click the Contribution View Sample File PDF file link on the Contributions Import screen.
- A stand-alone spreadsheet for loan repayments is required if a participant repays more than one loan number at a time.
- Import multiple payroll dates separately.
- If there are header/trailer lines, they must be identified when creating the template. Rows must be consecutive. Remove any blank rows.

- Refer to the loan amortization schedule for the payment amount and loan number.
- Payments must be the exact payment amount or an exact multiple of the scheduled repayment.
- Negatives and adjustments are not permitted to loans.

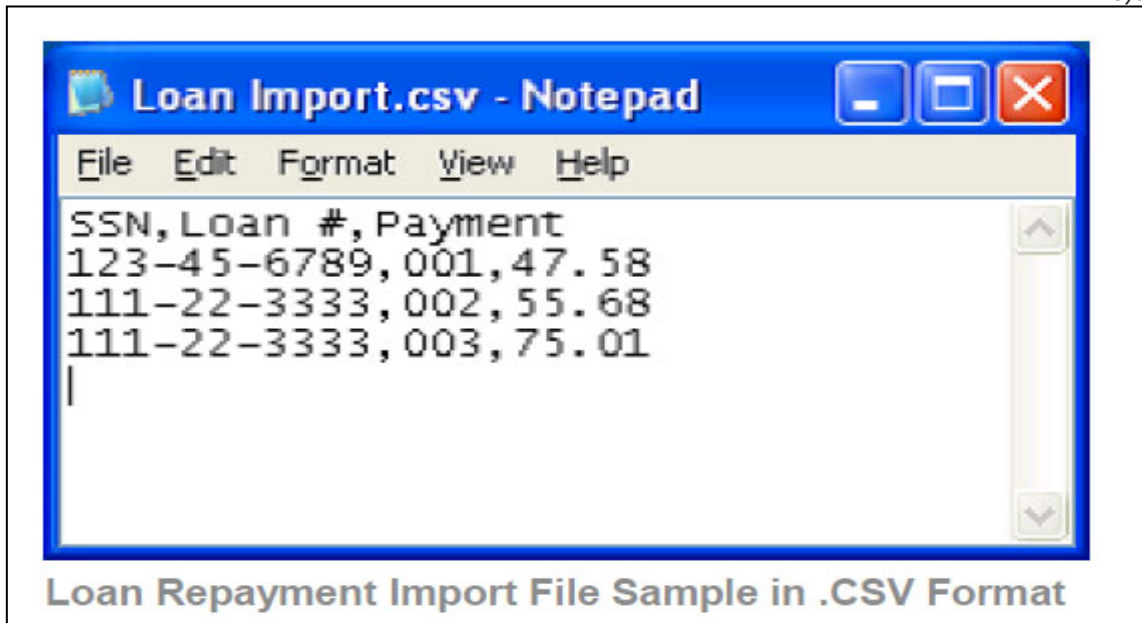
## Data Fields and Formatting

Fields/cells should be formatted as text.

<p><u>Social Security Number</u></p>	<p>Must be nine digits. Leading zeros must be included. Acceptable formats: 999-99-9999 or 999999999. If the Social Security number format does not contain hyphen, make sure that the field is formatted as text. In MS-Excel, a green triangle indicates that you have stored values as text.</p>
<p><u>Participant Name</u></p>	<p>Not required</p>
<p><u>Loan Repayment Amount Column</u></p>	<p>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:</p> <ul style="list-style-type: none"> <li>• <u>Explicit: 999.99</u></li> <li>• <u>Implicit: 99999 (the two rightmost digits are cents)</u></li> </ul>
<p>Division Codes</p>	<p>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.</p>
<p>Loan Number</p>	<p>Three digits required and must include leading zeros. For example: 001, 002, 006.</p>

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

Loan Repayment Import File Sample in MS Excel Format



## Templates Screen

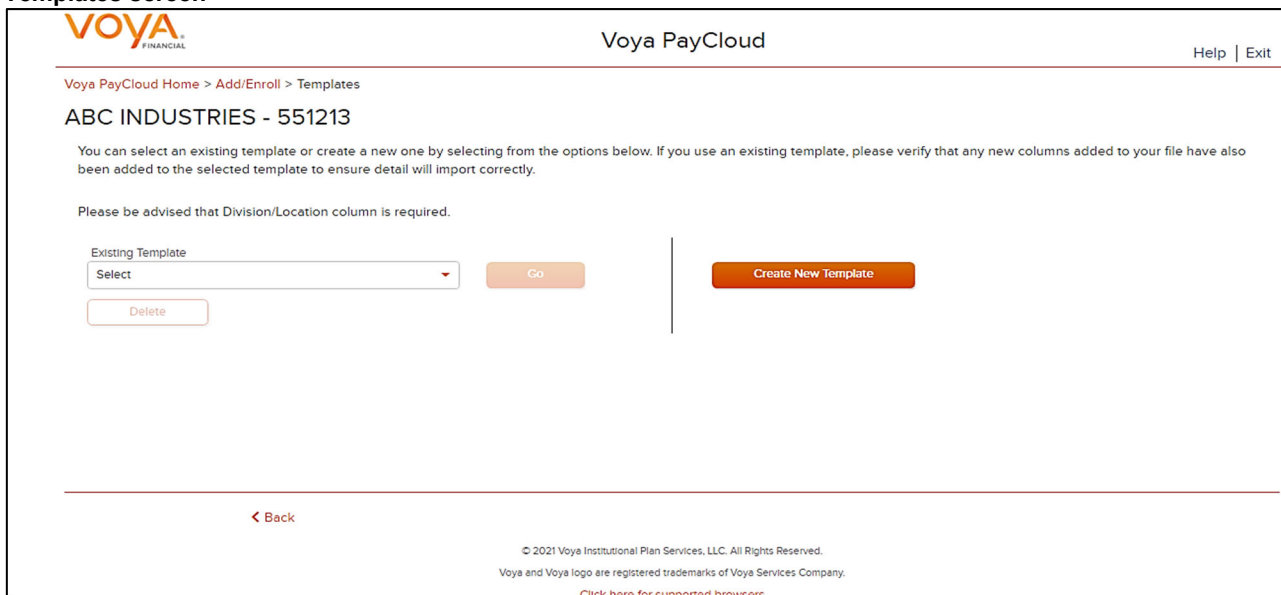
After you've selected **Continue** from the File Browse screen, you'll see the Templates screen. From here you can:

- 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.

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



## 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 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

Voya PayCloud

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

ABC INDUSTRIES - 551213

Create a new template

1 New Template Name

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

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

Headers: No Headers

Trailers: No Trailers

4 Now select each column title:

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

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

< 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](#)

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

### Create column headings

## Fields

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

## Screen Options

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

## Map Column Header Screen

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

### Map column header screen - New Template

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

ABC INDUSTRIES - 551213

Existing Template: Test Template 1

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

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

Now select each column title:

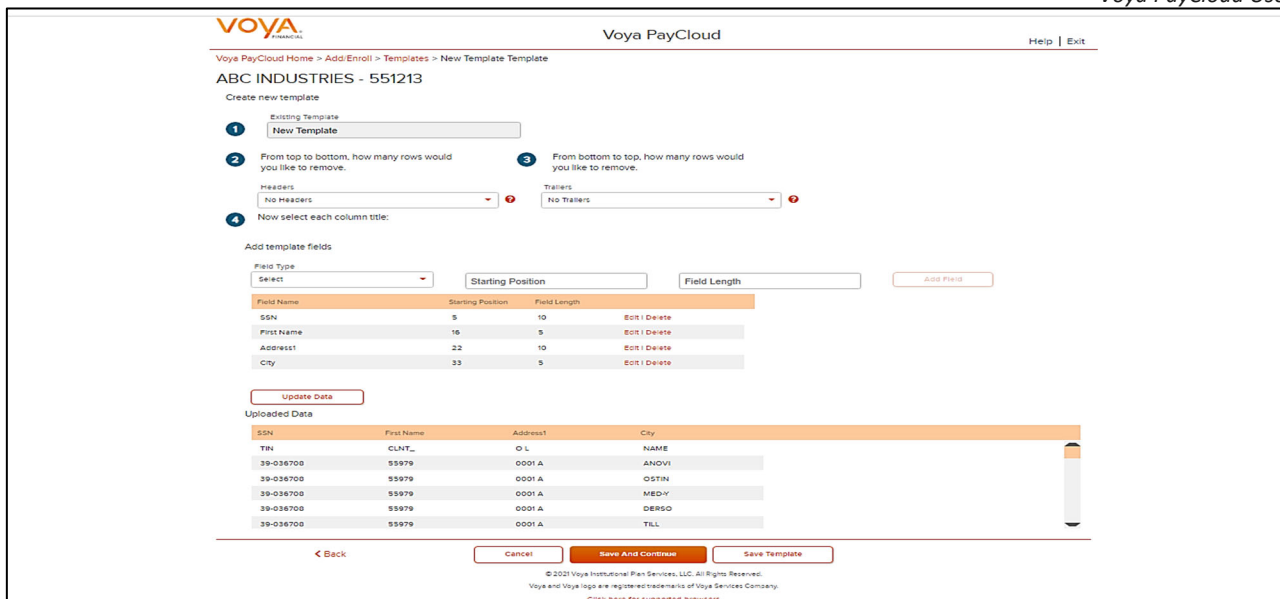
This template can be modified by selecting a new heading from the drop down list. To bypass a column, select Not Applicable.

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

© 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.](#)

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

## Screen Options

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



- Click **Save Template** to save the template

## Existing Template Screen

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

### Existing Template screen

Voya PayCloud Home > Add/Enroll > Templates > Tem\_Enroll\_15Jan Template

ABC INDUSTRIES - 551213

Existing Template  
Tem\_Enroll\_15Jan

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

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

Now select each column title:

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

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

< 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](#)

## Fields

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

## Screen Options

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

## Error Corrections

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

### Error Messages screen

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

ABC INDUSTRIES - 551213

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

[View Error Messages](#)

Existing Template  
1 Test Template 1

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

Headers: 1      Trailers: No Trailers

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

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

< Back      Cancel      Save And Continue      Save Template

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

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

### Error Message Details

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

**Done**

### Screen Options

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

### Error Messages

Validations and corresponding error messages include:

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

<p><b>“Participant Not in Authorized Division/Location”</b></p>	<p>Verify that the participant’s division code is correct.</p>	<p>You cannot import a participant for a division that you are not authorized for.</p>
<p><b>“The participant has an invalid date of birth. We are unable to determine the correct Voya Lifetime Investment Protection (VLIP) fund. Please re-enter the date of birth.”</b></p>	<p>Verify that the date of birth is correct, in the correct format (MM-DD-YYYY) and falls within the VLIP DOB range.</p>	<p>This error appears if a VLIP fund is chosen and the DOB field is left blank or the format is incorrect. Participants enrolling in these funds are automatically enrolled into their age-appropriate VLIP vintage (fund).</p>
<p><b>“This participant currently has both \$ and % election types on file. Contribution election types must match across all sources. Please call 1-800-238-6212 (select option 0 and then option 2 for Voya PayCloud) for assistance.”</b></p>	<p>Verify that the contribution election types already on file are the same for all sources, on a per-participant basis (either all dollars or all percents).</p>	<p>This appears if contribution election types (\$ or %) are inconsistent among the different sources, for a given participant.</p>
<p><b>“xx-xx-xxxx - Social Security number must be 9 digits.”</b></p>	<p>Verify that the SSN has nine digits.</p>	<p>SSN is not nine digits.</p>
<p><b>“xxx-xx-xxxx- Participant Social Security number not found.”</b></p>	<p>Verify that the SSN exists in the plan.</p>	<p>Appears if the SSN not in the recordkeeping system.</p>
<p><b>Example “&lt;Field&gt; cannot be negative”</b></p>	<p>Verify the amounts do not have negatives or parenthesis.</p>	<p>The error message will display the column heading.</p>
<p><b>Example “&lt;Field&gt; is limited to two decimal places”</b></p>	<p>Verify that the dollar amounts do not have more than 2 decimal places.</p>	<p>The error message will display the column heading.</p>
<p><b>Example “Error in column #: &lt;Field&gt; already exists”</b></p>	<p>Verify that the same column heading has not been selected twice.</p>	<p>The error message will display the column heading and the expected length.</p>
<p><b>Example: “Select heading for column 2”</b></p>	<p>Verify that column headings have been selected.</p>	<p>The error message will display the column heading number.</p>
<p><b>ZIP Code does not match State</b></p>	<p>Verify that the ZIP code is correct.</p>	

## Verification Screen

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

### Verification screen (For Enrollment Import)

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

ABC INDUSTRIES - 551213

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

View Error Messages

Existing Template  
1 Test Template 1

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

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

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

	A	B	C	D	E	F
11	SSN	Not Applicable	First Name	Last Name	Address1	City
	9999904319		TESTFIRST	TESTLAST10	123 MAIN	ANY
12	999984320	1	TESTFIRST	TESTLAST11	123 MAIN	ANY
13	999984321	1	TESTFIRST	TESTLAST12	123 MAIN	ANY
14	999984322	1	TESTFIRST	TESTLAST13	123 MAIN	ANY
15	999984323	1	TESTFIRST	TESTLAST14	123 MAIN	ANY

Back Cancel Save And Continue Save Template

© 2021 VOA Institutional Plan Services, LLC. All Rights Reserved.  
Voya and VOA logo are registered trademarks of VOA Services Company.  
[Click here for supported browsers](#)

## Screen Options

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

### Confirmation screen

Voya PayCloud Home > Add/Enroll Confirmation

ABC INDUSTRIES - 551213

Print

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

< Back    Cancel    Save And Continue    Save Template

© 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

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

ABC INDUSTRIES - 551213

Add/Enroll a participant in the plan

Social Security Number (NNNNNNNNN)

Last Name    First Name    MI

Country: United States of America    Zip Code

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


Status: 04-Eligible; Not Participate

Enroll this participant

< Back    Cancel    Continue

© 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](#)

### Participant Information screen – QDIA Default Enrollment option


Voya PayCloud
Help | Exit

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

**ABC INDUSTRIES - 551213**

Add/Enroll a participant in the plan

Status  
 OA-Eligible, Not Participant  
 Enroll this participant  
 Has the participant elected the Morningstar Managed Account Program?  
 Is this a GDIA default enrollment


< Back
Cancel
Continue

© 2019 Voya Institutional Plan Services, LLC. All rights reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers.](#)

## Fields

The following fields accept data entry from you; if not noted as Optional, then the field would be required for data entry.

Field	Description
<b>Social Security Number</b>	Social Security Number must include nine digits. The nine digit user entry will be formatted as NNN-NN-NNNN
<b>Email (Optional)</b>	Participant e-mail address
<b>Last Name</b>	Participant last name
<b>First Name</b>	Participant first name
<b>MI (Optional)</b>	Middle Initial
<b>Address Line 1</b>	Participant address
<b>Address Line 2 (Optional)</b>	Participant address
<b>City</b>	Participant City
<b>State</b>	Participant State
<b>Zip Code</b>	Participant Zip Code
<b>Country</b>	Defaults to United States of America. A different country may be selected from the drop-down

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



Field	Description
	<p>Check the “Is this a Default Enrollment?” checkbox if you are performing a default enrollment to enroll the participant into the plan’s default investment option. You will need to set up and/or confirm the investment election to the appropriate fund based on the plan’s investment option as part of this enrollment transaction.</p> <p>Do not select the default enrollment box if the employee has submitted a signed enrollment form and has made a positive election.</p> <p>Contact Voya for further information</p>

## Screen Options

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

## Error Messages

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

## Sample error message

The screenshot shows the 'Add/Enroll Participant Information' screen for 'ABC INDUSTRIES - 551213'. The form contains the following fields and values:

- Social Security Number (NNNNNNNNN): 012-56-7878
- Email Address (Optional): (empty)
- Last Name: Test
- First Name: Error
- MI: MI
- Address Line 1: 319 Trailside Way
- Address Line 2 (Optional): (empty)
- City: Ashland
- State: Select (dropdown menu)
- Country: United States of America (dropdown menu)
- Zip Code: 01721000

A red error message is displayed below the Zip Code field: "Please enter a valid Zip Code".

At the bottom of the form, there are two date fields: "Date of Birth (MM/DD/YYYY)" and "Date of Hire (MM/DD/YYYY)", both with calendar icons. Below these is a "Status" section with the text "04-Eligible; Not Participate" and a checkbox labeled "Enroll this participant" which is currently unchecked.

Navigation buttons include a red "< Back" button, a white "Cancel" button, and an orange "Continue" button.

Footer text includes: "© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.", "Voya and Voya logo are registered trademarks of Voya Services Company.", and "Click here for supported browsers".

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

## 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

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

**ABC INDUSTRIES - 551213**

Please indicate contribution elections below

Contribution Elections

EE PRE TAX  
Percent 10.00 %

ROTH  
Percent 80.00 %

Catch-Up Contribution Elections

ROTH  
Percent 85.00 %

Investment Elections

Please choose "Across ALL Sources Elections" or choose the specific sources of money that you want to invest differently for future money.

Select Sources

- Across ALL Sources Elections
- LRI ER Elections
- ROTH ROLLOVER Elections
- MURREY ER Elections
- PRIORMATCH Elections
- ROLLOVER Elections
- ER MATCH Elections
- LEMAY PS Elections
- ROTH Elections
- QNEC Elections
- TAKEOVER Elections
- LEMAY S/H Elections
- PRETX.MTCHD Elections

< Back      Cancel      Continue

© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

Field	Description
<b>Contributions Election Amount or Percent</b>	The mode of contributions to be used i.e. dollar amount or percent of the Contribution Elections.
<b>Source</b>	The source for the contribution elections.
<b>Catch Up Contribution Election Type</b>	The mode of catch-up contributions to be used for all sources (Percent or Amount)
<b>Catch-Up Source</b>	The source for the catch-up contribution elections.
<b>Investment Elections</b>	The checkbox indicates that investment election will be allocated across all sources.
<b>Source List</b>	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 Home > Participant Update Search Participant > Participant Update Participant Information > Additional Information > Contribution Elections > Investment Elections

ABC INDUSTRIES - 551213

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

Search by:

Fund Name	Across ALL Sources
American Funds 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 %
Neuberg Berm Real Est Fnd R6	0 %
<b>Total</b>	<b>100 %</b>

< 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](#)

Contributions can be allocated to individual funds on this screen.

## Fields

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

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

## Add/Enroll Investment Elections screen – Default Investment Option

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

**ABC INDUSTRIES - 551213**

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

Fund Name:  
Voya Solution 2050 Portfolio Srv

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

< Back      Cancel      Continue

© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)



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

## Screen Options

- Click **Back** to go to 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.

### Add/Enroll Verify screen

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

**ABC INDUSTRIES - 551213**

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

Participant Name ST TE-DP	Participant Address PO BOX 363 0.00 LITCHFIELD PARK, AZ 853400363 USA	Social Security Number 347642404
Email Address NICKOLASBARTHLOMEW-DP@XYZ.COM	Date of Birth 06/23/1969	Date of Hire 08/01/2011
E Mail Address NICKOLASBARTHLOMEW-DP@XYZ.COM	Status 00-Active And Eligible	

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

< Back      Cancel      Edit      Submit

© 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 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
  - Click **Cancel** to go 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 enrollment will display in the top left of the screen.




## Add/Enroll Confirmation screen – Default Enrollment option


Voya PayCloud
Help | Exit

Voya PayCloud Home > Add/Enroll Confirmation

### ABC INDUSTRIES - 551213

 Print

**✔ Participant (Bern Brandon) successfully enrolled on 10/16/2019 at 06:03:14.**

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

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

Contribution Elections Source	Type	Amount
EE PRE TAX	%	10.00
ROTH	%	80.00
Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	85.00

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

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

Fund Name:  
Voya Solution 2050 Portfolio Srv


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

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

Go To Homepage

© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Add/Enroll Confirmation screen – Default Enrollment option not performed


Voya PayCloud
Help | Exit

---

Voya PayCloud Home > Add/Enroll Confirmation

### ABC INDUSTRIES - 551213

✔ Participant (Test 4 Test Participant 4) successfully enrolled on 10/16/2019 at 07:24:59.

Print

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

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

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

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	85.00

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

Fund Name	Across ALL Sources
ABC_JC_31	50%
LongName36	50%

[Go To Homepage](#)

© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

### 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


The screenshot shows the Voya PayCloud Home screen for ABC INDUSTRIES - 551213. The interface includes the following elements:

- Header:** VOYA FINANCIAL logo, "Voya PayCloud", and "Help | Exit" link.
- Plan Information:** "Voya PayCloud Home", "ABC INDUSTRIES - 551213", and a "Change Plan" link.
- Instruction:** "Select an operation from the tiles shown below".
- Functional Tiles:**
  - Add/Enroll:** Add Enroll participant
  - Participant Update:** View/Update participant information
  - Batch Participant Update:** Update multiple participants
  - Contributions:** Process contributions to accounts
  - Pending/Submitted Batches:** Review batch information
  - Loan Repayment:** Process loan repayments
  - Contributions/Loan Repayment:** Process a file with contributions and/or loan repayment data
  - Bank Information:** Add or update assigned bank
  - Administration:** Review and update your settings
- Availability Notice:** "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".
- Footer:** Copyright notice for 2021 Voya Institutional Plan Services, LLC, and a link for supported browsers.

## Participant Search Screen

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

### Participant Search

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

## Screen Options

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

### Search Results screen

Social Security Number	Participant Name
789-07-8900	T, I
347-64-2404	TE-DP, ST
123-43-2123	TEST, TEST
142-56-3452	TEST 3, FIRSTTEST 3
123-78-9456	TEST BADI, TEST RAGHAV
485-94-5849	TEST P1, P1
584-75-8475	TEST P2, P2
849-85-9458	TEST PARTICIPANT 2, TEST 2
545-48-5787	TEST PARTICIPANT 4, TEST 4
963-96-3963	TEST RA, RA R
998-87-7665	TEST TEST, DF

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


## Screen Options

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

## Participant Information Screen

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

### Participant Information screen

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

## Fields

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

Field	Description
Termination Date (if applicable)	The date of termination.
Termination Reason	Reason for the termination: Retirement  Permanent Disability

Field	Description
	<p>Death</p> <p>Voluntary Termination</p>
<p><b>Do You Want to Make the Participant Active?</b></p>	<p>Checking this box allows you to define contribution and investment elections for the participant. The Plan Entry Date defaults to the current date. If the plan requires the participant to define their own contribution and investment elections, leave this box unchecked.</p>
<p><b>Has the Participant Elected the Morningstar Managed Account Program?</b></p>	<p>Morningstar election checkbox (if applicable for your plan).</p>
<p><b>Is this a QDIA Default Enrollment?</b></p>	<p>Displays if the plan offers QDIA enrollment for participants that are eligible but not participating. If the plan's QDIA is Managed Accounts, you must also select the Morningstar checkbox.</p> <p>You can click on the question icon for help text. The below information displays within a pop-up.</p> <p>“A Qualified Default Investment Alternative (“QDIA”) is an investment alternative or option, as defined under rules issued by the Department of Labor, that has been chosen by the Plan’s fiduciary in those instances when participants fail to provide direction or instruction how to invest monies in their retirement plan account.</p> <p>Check the QDIA default enrollment box to indicate that you are enrolling the employee into the plan’s QDIA option. You will need to set up the investment election to the appropriate QDIA option as part of this enrollment transaction.</p> <p>Do not select the QDIA default enrollment box if the employee has submitted a signed enrollment form with any portion of the investment election that uses the QDIA fund. For example if the employee actively elects 100% to the plan's QDIA option, this is not considered a defaulted investment election.</p> <p>Contact Voya for further information.”</p> <p><b>Note:</b> This option is not available for all plans.</p>
<p><b>Is this a Default Enrollment?</b></p>	<p>Displays if the plan does not offer QDIA default enrollment.</p> <p>You can click on the question symbol for help text. The below information displays within a pop-up.</p> <p>Check the “Is this a Default Enrollment?” checkbox if you are performing a default enrollment to enroll the participant into the plan’s default investment option. You will need to set up and/or confirm the investment election to the appropriate fund based on the plan’s investment option as part of this enrollment transaction.</p> <p>Do not select the default enrollment box if the employee has submitted a signed enrollment form and has made a positive election.</p> <p>Contact Voya for further information</p>

## 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

## Fields

Field	Description
<b>Leave of Absences Start Date</b>	Start date of the leave. Use the calendar icon
<b>Leave of Absence Start Reason</b>	This field is required if a Start Date is entered. Select from: FMLA  Military  Other
<b>Leave of Absences End Date</b>	The end date for a leave, if known. Use the calendar icon

Field	Description
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.”

### Sample error message

The screenshot shows the 'Update participant information' screen for 'ABC INDUSTRIES - 551213'. The form contains the following fields and values:

- Social Security Number (NNNNNNNN): 423093770
- Last Name: ALMAN-DP
- First Name: YICKY
- MI: MI
- Address Line 1: 2213 B
- Address Line 2 (Optional):
- City: TULSA
- State: OK
- Country: United States of America
- Zip Code: 98899
- Date of Birth: 11/19/1987
- Date of Hire: 10/09/2018
- Termination Date: 12/12/2018
- Termination Reason: Voluntary Termination
- Status: 00-Active And Eligible

A red error message is displayed below the Zip Code field: "Zip code is not valid for the state".

At the bottom of the form, there are three buttons: "< Back", "Cancel", and "Continue".

Footer text: © 2021 Voya Institutional Plan Services, LLC. All Rights Reserved. Voya and Voya logo are registered trademarks of Voya Services Company. [Click here for supported browsers](#)

## Additional Information Screen

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



**Additional Information Screen**

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

**Date Fields**

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

Field	Description
<p><b>Rehire Date</b></p>	<p>Rehire Date should be populated with the employee's most recent hire date. By populating this field (Rehire Date), employees in a terminated status code will be updated to an active status and all applicable termination information will be removed.</p> <p>Please advise the employee that they must establish their contribution rates and confirm their investment allocations in the plan on line in order to resume contributions to the savings plan.</p> <p>Voya does not use this field to calculate vesting. Depending on your plan's vesting method and service options you may be required to update additional information to correctly calculate the vested balances for the employee.</p> <p>Contact Voya for further information</p>
<p><b>Alternate Vesting Date</b></p>	<p>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.</p> <p>For example, if your Employee's rehire date is January 1, 2007 and you need to take into account an additional one year of service prior to the rehire date, your employee's Alternate Vesting Date would be January 1, 2006.</p>
<p><b>Adjusted Date of Hire</b></p>	

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

## Screen Options

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

## Participant Update Contribution Elections Screen

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

### Participant Update Contribution Elections screen

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

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

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

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

## Fields

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

## Screen Options

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


## Participant Update Investment Elections Screen

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



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

### Participant Update Investment Elections screen – No Default Enrollment


Voya PayCloud
Help | Exit

---

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

**ABC INDUSTRIES - 551213**

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

Search by: Select Search Q

Fund Name	Across ALL Sources
American Funds Nv Prspctv R3	0 %
ABC_JC_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 %
Newborn Bond Deal Est Srv 06	0 %
Total	100 %

< Back

Cancel
Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.

Voya and Voya logo are registered trademarks of Voya Services Company.

[Click here for supported browsers](#)


## Fields

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

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

### Participant Update Investment Elections screen – Default Enrollment



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

### Screen Options

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


### Error Messages

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

## Participant Update Verify Information Screen

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

### Participant Update Verify Information Screen – No Default Enrollment


Voya PayCloud
Help | Exit

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

**ABC INDUSTRIES - 551213**

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

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


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

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

< 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](#)

### Participant Update Verify Information Screen – Default Enrollment


Voya PayCloud
Help | Exit

---

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

### ABC INDUSTRIES - 551213

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

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

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

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

< Back


Cancel
Edit
Submit

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

### Participant Update Confirmation screen – No Default Enrollment


Voya PayCloud
Help | Exit

---

Voya PayCloud Home > Participant Update Confirmation

### ABC INDUSTRIES - 551213

✔ Participant successfully updated.

🖨️ Print

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

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


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

Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

Go To Homepage

© 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](#)


### Participant Update Confirmation screen – Default Enrollment


Voya PayCloud
Help | Exit


---

Voya PayCloud Home > Participant Update Confirmation

**ABC INDUSTRIES - 551213**

 **Participant successfully updated.**

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

 **Print**

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

Contribution Elections Source	Type	Amount
EE PRE TAX	%	50.00
ROTH	%	20.00
Catch-Up Contribution Elections Source	Type	Amount
ROTH	%	0.00

Go To Homepage

© 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

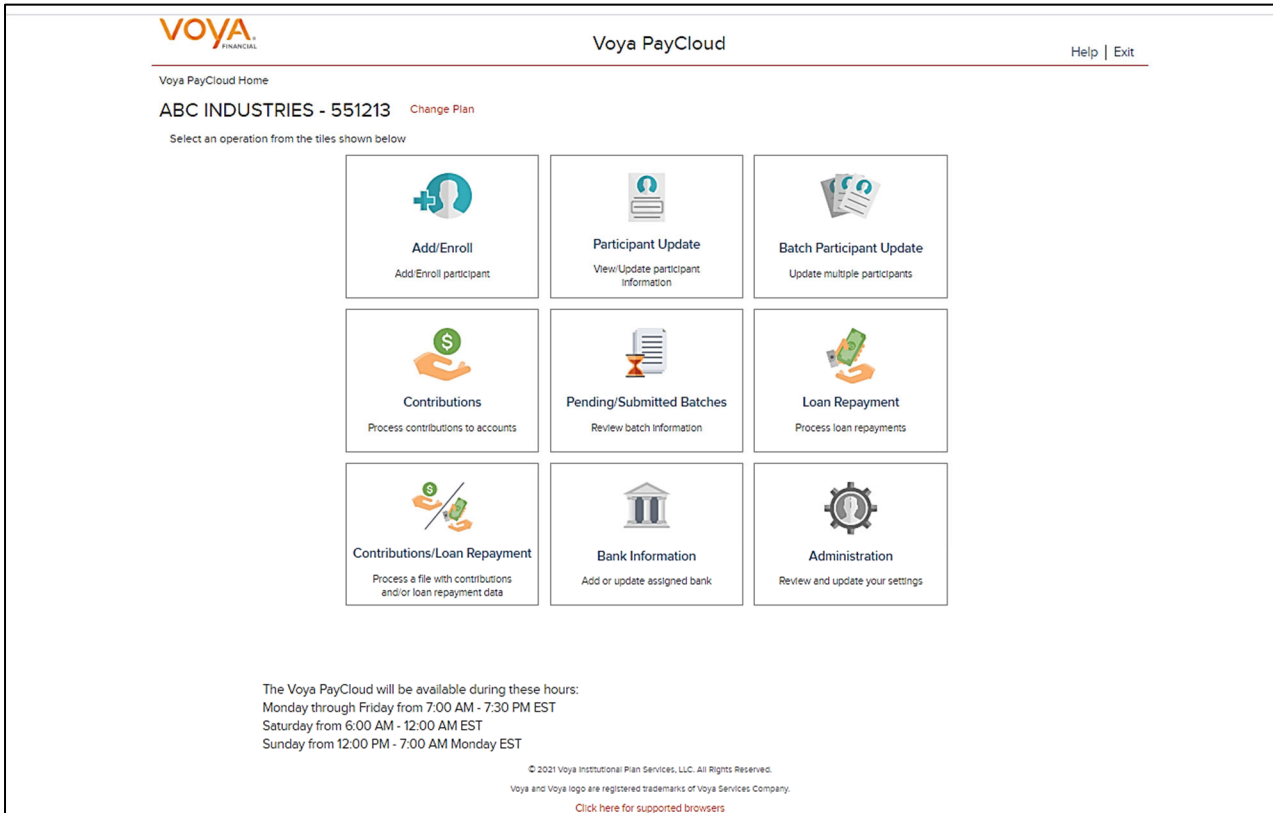
- Click **Print** to print a copy of the confirmation screen
- Click **Go to Homepage** to go to the Home screen

# Batch Participant Update

## Overview

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

### Home screen



## Batch Participant Import Screen

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

### Batch Participant Update – Import File screen



**VOYA**  
FINANCIAL

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 manually  
I will manually enter the participant data.

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

© 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

- 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**  
FINANCIAL

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 manually**  
I will manually enter the participant data.

Select a File

[Browse...](#)

[View Sample File for formatting instructions](#)

[Back](#) [Continue](#)

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Screen Options

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

## 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<sup>®</sup> FINANCIAL

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

Please be advised that Division/Location column is required.

Existing Template

Select Go

Delete Create 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](#)

## 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 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

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

ABC INDUSTRIES - 551213

Create a new template

1 New Template Name

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

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

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


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

< Back Cancel Save And Continue Save Template

© 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](#)

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


Voya PayCloud
Help | Exit

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

### ABC INDUSTRIES - 551213

Create a new template

- 1
- 2 From top to bottom, how many rows would you like to remove?  
 Headers:  ?
- 3 From bottom to top, how many rows would you like to remove?  
 Trailers:  ?
- 4 Now select each column title:  
 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	Column 1	Last Name	First Name	ADDR 1	ADDR 2	City
2	Last Name	Lisa	Haydon	1113 B		Vatican
3	First Name	LN	Fn	12	1212	OK
	Middle Initial					
	Social Security Numb					

< 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](#)

## Fields

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

Field	Description
	“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.”
<b>Column Headings</b>	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 <b>Not Applicable</b> .

## 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 FINANCIAL** Voya PayCloud Help | Exit

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

**ABC INDUSTRIES - 551213**

1 Existing Template  
Test Template 3

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

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

4 Now select each column title:

Add template fields

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

Field Name	Starting Position	Field Length	
Social Security Number	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 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](#)

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.

### Existing Template screen

VOYA FINANCIAL

Voya PayCloud Help | Exit

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

ABC INDUSTRIES - 551213

Existing Template  
 1 Test Template 10

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

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

4 Now select each column title:

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

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

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

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

Field	Description
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.

Field	Description
	“Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”

## Screen Options

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

## Error Corrections

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

### Error Messages screen

Voya PayCloud

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

ABC INDUSTRIES - 551213

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

View Error Messages

Existing Template: Test Template 10

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

Headers: 1 Trailers: No Trailers

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

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

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 **Back** to go to the Templates screen.
- Click **Cancel** to go to the Home screen



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

### Error Message Details

**Errors**
 Print

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

Done


### Screen Options

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

## Batch Participant Update Audit Verify Information Screen

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

### Verification screen


Voya PayCloud
Help | Exit

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

### ABC INDUSTRIES - 551213

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

Search by: 

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	tdst12@gmail.com	980423006	09091985

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

◀ Back

Cancel
Submit

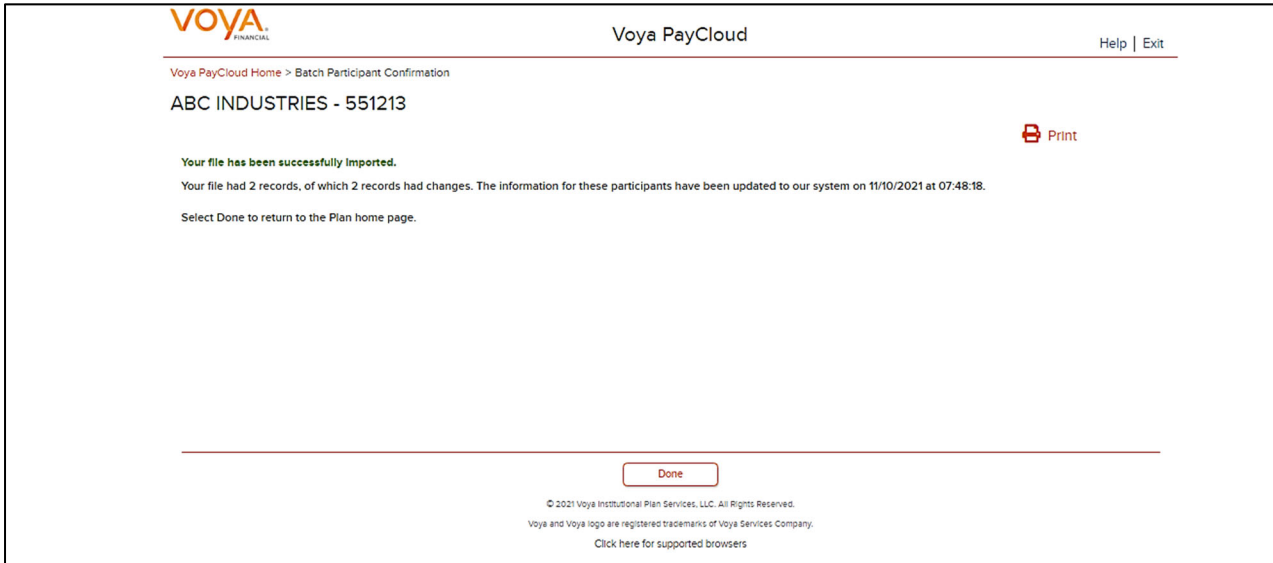
© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

### Screen Options

- Click **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]

**VOYA**  
FINANCIAL

Voya PayCloud

Help | Exit

Voya PayCloud Home > Batch Participant Import > Field Selection

**ABC INDUSTRIES - 551213**

The following fields (unless otherwise indicated) are available for updates by enabling the checkbox. Note that the field marked inquiry only are displayed for your convenience and are not available for updates.

- NAME
- ADDRESS
- EMPLOYEE STATUS (Inquiry Only)
- DATE OF BIRTH
- DATE OF HIRE
- ALT VEST DATE (Inquiry Only)
- PAYROLL FREQUENCY (Inquiry Only)
- REHIRE DATE (Inquiry Only)

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

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

## Batch Participant Update Screen


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

There are two ways to change existing information for participants:

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

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

### Batch Participant Update screen


Voya PayCloud
Help | Exit

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

### ABC INDUSTRIES - 551213

Select Division/Location

0001 HARDWOODS SPECIALTY PRODUCTS

Display Active Participants Only  
 Display All

Done

Search by: Select Search Q

Name	SSN	First Name	Last Name	MI	Address Line1	Address Line2
LAST_NAME U, TESTING...	012686501	TESTING_U	LAST_NAME U	U	100 MAIN ST	100 MAIN ST1
BARNETT-DPIWE, HAMILT...	014480274	HAMILTON	BARNETT-DPIWE	QWE Q	801 JEFFERSON AVEa1	a2 UPDATE
HELDT-DP, RON QWE F	021674040	RON	HELDT-DP	QWE F	3305 S 500 E	0.00
GOTCHER-DP1, ROBBIE Q...	026655190	ROBBIE	GOTCHER-DP1	QWE F	501 NORCROSS LN	0.00
PARAS-DP, JUNIORGEWWE	027657203	JUNIORGEWWE	PARAS-DP		10950 ARROW RTE	0.00
BONELLI-DP, BUCK	028837868					

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


Back
Cancel
Submit

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

Field	Description
<b>Select Division/Location</b>	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.
<b>Select All Divisions</b>	To select all divisions listed.
<b>Display Active Participants Only</b>	Select this option to display all active participants in the plan.
<b>Display Active and Ineligible Participants</b>	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."
<b>Display All Participants</b>	Select this option to display all participants in the plan
<b>Hide Terminated Participants</b>	Uncheck this box to display the terminated participants in the plan. This box is checked by default and does not display the terminated participants
<b>All other fields</b>	You can edit any information in the lower part of the screen, except the Participant Name and SSN.

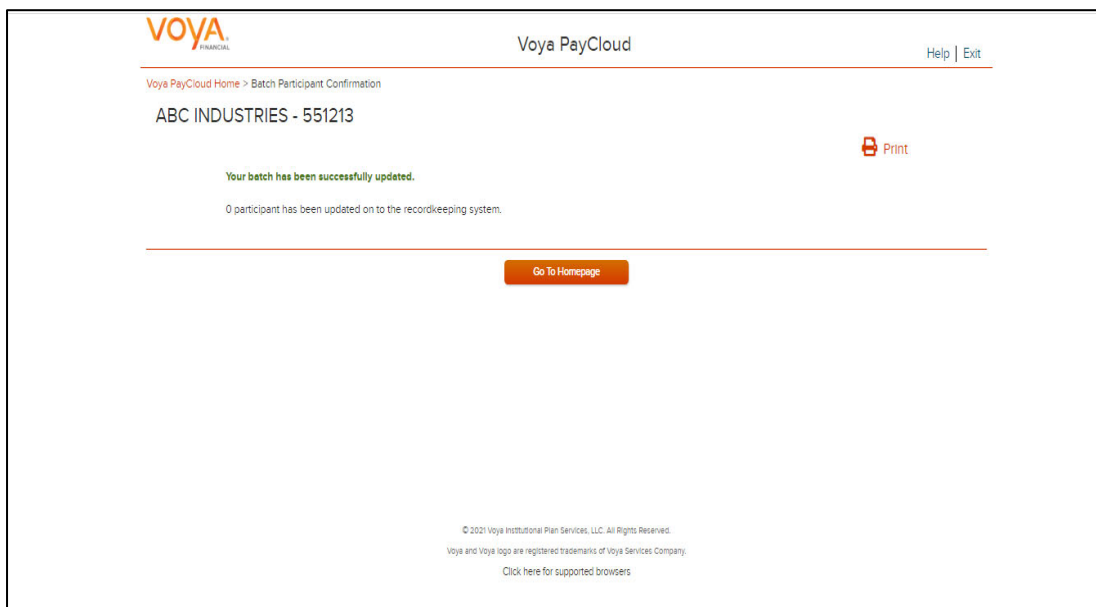
Field	Description

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

## Screen Options

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

### Confirmation screen



## Screen Options

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



# Contributions

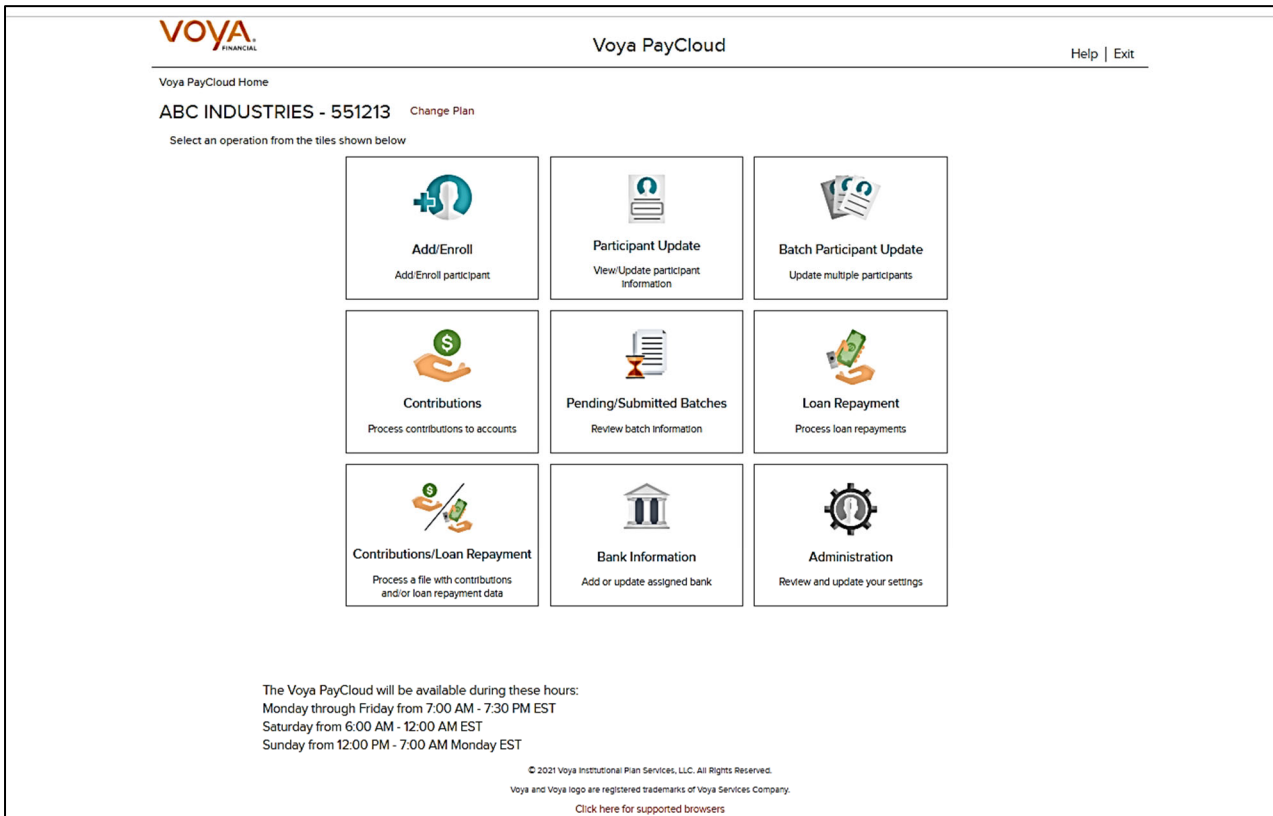
## Overview

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

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

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

### Home screen



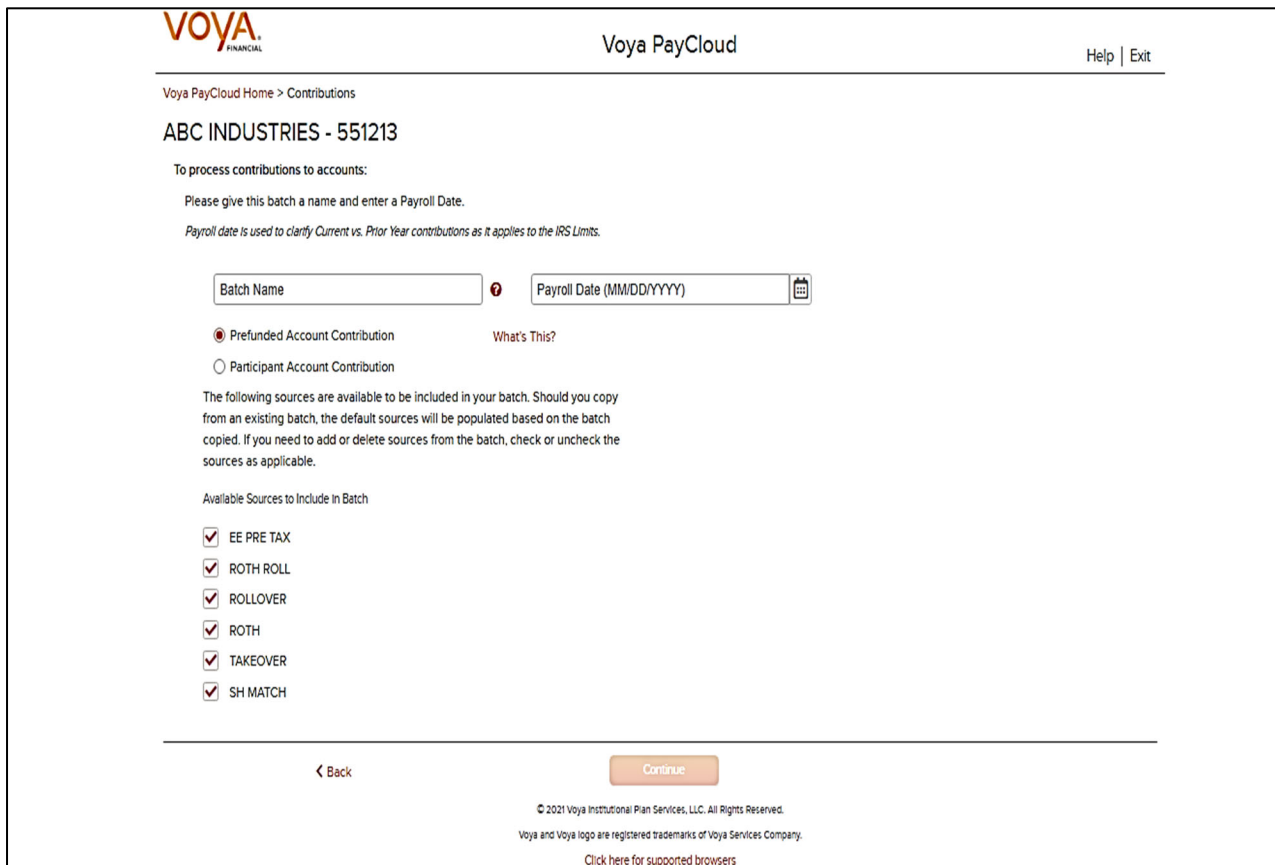
## Contributions Set Up Screen

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**  
FINANCIAL

Voya PayCloud Help | Exit

Voya PayCloud Home > Contributions

**ABC INDUSTRIES - 551213**

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

Batch Name  ? Payroll Date (MM/DD/YYYY)  

Prefunded Account Contribution What's This?  
 Participant Account Contribution

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

Available Sources to Include in Batch

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


← Back
Continue

© 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](#)

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

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




Voya PayCloud
Help | Exit

Voya PayCloud Home > Contributions

### ABC INDUSTRIES - 551213

To process contributions to accounts:

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

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

Prefunded Account Contribution What's This?  
 Participant Account Contribution  
 Display Active Participants Only  
 Display All
- Would you like to upload a file containing participant data?

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

Process contributions manually  
I will manually enter the participant data.

Display Participants With Contributions

Copy Payroll Data From

Select

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

Available Sources to Include in Batch







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


← Back
Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

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

Field	Description
	 <b>Note:</b> 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.
<b>Prefunded Account Contribution</b>	Select this option to contribute to the Prefunded Account through the contribution batch   <b>Note:</b> 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
<b>Participant Account Contribution</b>	Select this option to contribute to the Participant Account through the contribution batch
<b>Display Active Participants Only</b>	Select this option to include only active participants in the contribution batch. This is selected by default   <b>Note:</b> This option is available for selection only for Participant Account Contribution
<b>Display Active and Ineligible Participants Only</b>	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."   <b>Note:</b> This option is available for selection (depending on plan settings) only for Participant Account Contribution
<b>Display All Participants</b>	Select this option to include all participants in the contribution batch   <b>Note:</b> This option is available for selection only for Participant Account Contribution
<b>Select All Division/Location</b>	Check this box to select all the divisions/locations in the plan for the batch (may not appear, depending on plan settings).
<b>Select Division/Location</b>	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.
<b>Display Participants with Contributions</b>	Filters for only the active plan participants that have made contributions (optional). This does not include active participants that have not contributed.   <b>Note:</b> 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





Field	Description
<b>Copy Payroll Data From</b>	<p>This field contains a drop-down list of previously submitted payroll files (may not appear, depending on plan settings). You can choose to create a new payroll and copy the financial data from your last payroll. This may be helpful if your payroll does not contain many changes. This data can include hours, (which can be accumulated provided your plan is set up for this function).</p> <p> <b>Note:</b> Previously submitted payroll files are sorted by pay date, with the most recent batch displayed first. This option is applicable only for Participant Account Contribution</p>
<b>Source Selection</b>	<p>Checked sources will appear on the following batch screen. If you have chosen to copy payroll data from a previously submitted payroll file, the default sources will be prepopulated based on the file copied. You can add or delete sources (check or uncheck) as applicable.</p>

## Screen Options

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

### Contributions Set Up screen with 'Upload a File' option selected for File Import

## Fields

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

## Screen Options

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

## File Browse

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

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

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

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

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



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

## Templates Screen

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

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

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

### Templates screen

**VOYA**  
FINANCIAL

Voya PayCloud

Help | Exit

Voya PayCloud Home > Contributions > Templates

## ABC INDUSTRIES - 551213

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

Please be advised that Division/Location column is required.

Existing Template

Select

Go

Create New Template

Delete

< 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](#)

## 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 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
<b>New Template Name</b>	Enter a name for the new template.
From top to bottom, how many rows would you like to remove?	<p>Select the number of header rows contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored to obtain the file data. They will still appear on this screen to help you select the column headings</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”</p>
From bottom to top, how many rows would you like to remove?	<p>Select the number of trailer rows contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”</p>
<b>Check Box if Dollar Amounts Have an Implied Decimal</b>	Check this box if the imported file has implicit decimals. If your file has decimals, leave this box unchecked.
<b>Column Headings</b>	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

Field	Description
	for each available source in the plan. To bypass a column, including name, select <b>Not Applicable</b> .

## Screen Options

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

## Map Column Header Screen

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

### Map column header screen - New Template

Voya PayCloud Home > Contributions > Templates > New template Template

ABC INDUSTRIES - 551213

Create new template

Existing Template  
 1 New template

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

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

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

4 Now select each column title:

Add template fields

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

Field Name	Starting Position	Field Length	
Social Security Number	5	9	Edit   Delete
BOTHROLL	18	2	Edit   Delete

Update Data

Uploaded Data

Social Security Number	EE PSE TAX	BOTH ROLL
9194 100	2	5
9209 100	2	6
9104 100	2	7
9123 100	2	6

< 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.  
 P193-194-000-000000000000

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

### Map column header screen - Existing Template



Voya PayCloud Home > Contributions > Templates > New template Template

ABC INDUSTRIES - 551213

Existing Template:

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

Headers:  Trailers:

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

4 Now select each column title:

Add template fields:

Field Type:  Starting Position:  Field Length:

Uploaded Data

Social Security Number	EE PRE TAX	ROTH ROLL
91594 100	2	5
92091 100	2	6
31084 100	2	7
51233 100	2	0

< 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](#)

## Existing Template Screen

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

### Existing Template screen

Voya PayCloud Home > Contributions > Templates > ContTest Template

ABC INDUSTRIES - 551213

Existing Template:

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

Headers:  Trailers:

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

4 Now select each column title:

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

	A	B	C	D	E
	Social Security Number	ROLLOVER	EE PRE TAX	Not Applicable	Column 5
1	SSN	ROLLOVER	EE PRETAX	ER PROFIT	Div Loc
2	013-45-9990	20.00	4.00	17.00	1006
3	313-43-7023	15.00	2.00	18.00	1006
4	321546123	12	22	0.00	1006

< Back

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

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

## Screen Options

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

## Error Corrections

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

### Error Messages screen

Voya PayCloud Home > Contributions > Templates > ContTest Template

ABC INDUSTRIES - 551213

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

View Error Messages

Existing Template: ContTest

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

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

Headers: 1 Trailers: No Trailers

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

4 Now select each column title:

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

	A	B	C	D	E
	Social Security Number	ROLLOVER	EE PRE TAX	Not Applicable	Not Applicable
1	SSN	ROLLOVER	EE PRE TAX	ER PROFIT	Div/Loc
2	013-45-9990	20.00	4.00	17.00	1006
3	313-43-7023	15.00	2.00	10.00	1006
4	321546123	12	22	0.00	1006

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

## Error Message Details

Errors Print

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

Done

## Screen Options

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

## Contributions Payroll Input Screen

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


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


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contributions > Payroll

### ABC INDUSTRIES - 551213

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

Batch Name

Payroll Date

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	EE PRE TAX	ROTH ROLL	ROLLOVER	ROTH	TAKEOVER	SH MATCH
P	999991001	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

< Back

Cancel
Save And Continue

© 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](#)

### Contributions Payroll Input screen – Participant Account Contribution


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contributions > Payroll

### ABC INDUSTRIES - 551213

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

Batch Name

Payroll Date

Search by:

Name	SSN	Status	Alt Vest Date	Payroll Frequency	EE PRE TAX	ROTH ROLL	ROLLOVER	RO
BACKER-DP, FRANKLYN	879787628	01-Active: Awaits Suspension		1	0.00	0.00	0.00	
BADIGERI, RAGHAV	123123124	30-Term & Awaiting Payment	05/17/2019	1	0.00	0.00	0.00	
BANDA-DP, EFRENE	485462760	10-Susp From Ee Cntrbs Only		1	0.00	0.00	0.00	
BANJUELOS-DP, DAMIAN	635423801	01-Active: Awaits Suspension		1	0.00	0.00	0.00	
BARNETT-DP/WE, HAMILTON ...	014480274	00-Active And Eligible		1	0.00	0.00	0.00	
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	
BONELLI-DP, BUCK	028837868	00-Active And Eligible			0.00	0.00	0.00	
<b>Total</b>					<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

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

Add Participants from Alternate Location

Add Additional Participants

New Enrollment

< Back

Cancel
Save And Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

### Prefunded Account Contribution

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

## Participant Account Contribution

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

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

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

## Multiple Division Plans

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

### Contributions Payroll Input Screen with Multiple Division Plan

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

Voya PayCloud Home > Contributions > Payroll

**ABC INDUSTRIES - 551213**

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

Batch Name:  Payroll Date:

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

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

Search by:

Name	SSN	Period Comp	Division/Location	Mos. Svc	Number Of Hours	Number Of Hours	Elig Hrs Anniv	1
4	xxxxx9607	0.00	1001	1	0.00	0.00	0.00	1,629.00
AKEY-DP, TEST 2	xxxxx9843	0.00	1001	14	0.00	0.00	0.00	1,539.00
ANGUANO-DP, TRINA	xxxxx5379	0.00	1005	4	0.00	0.00	0.00	1,629.00
ANGUS-DP, KATIA	xxxxx7780	0.00	1005	2	0.00	0.00	0.00	1,629.00
ANSELMO-DP, AMBROSE	xxxxx9476	0.00	1005	4	0.00	0.00	0.00	1,629.00
ARCHAMBAULT-DP, CLEMENT...	xxxxx7859	0.00	1005	1	0.00	0.00	0.00	1,629.00
ARDOIN-DP, CHI	xxxxx5799	0.00	1005	1	0.00	0.00	0.00	1,131.00
BARCO-DP, HOPE	xxxxx5926	0.00	1005	5	0.00	0.00	0.00	1,578.00
BARSDALE-DP, KYONG	xxxxx2315	0.00	1005	8	0.00	0.00	0.00	1,629.00
BEETS-DP, PAULINE	xxxxx5582	0.00	1005	1	0.00	0.00	0.00	1,629.00
BEGLEY-DP, GINO	xxxxx2896							
<b>Total</b>								

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

© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)


## Screen Options

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

## Add Participants from Alternate Location screen

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

### Add Participants from Alternate Location


Voya PayCloud
Help | Exit

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

#### ABC INDUSTRIES - 551213

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

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

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

- Select the Div Sub to apply funding to.
 

Select Division/Location to Apply Funding to SSN

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

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

Social Security Number	Participant Name		Added Participants
123-45-6799	TEST, TEST ASD T	Add	TEST, TEST ASD
999-99-0002	TAKEOVER 2	Add	123456799 0001 <span style="float: right; color: red;">Remove</span>
999-99-0003	TAKEOVER 3	Add	TAKEOVER, 3
999-99-0004	TAKEOVER 4, FN 4	Add	999990003 0001 <span style="float: right; color: red;">Remove</span>

© 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.](#)

Select a Div/Sub to apply the funding to.

To add a participant to the selected batch:

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

To delete a previously added participant:

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

## Screen Options

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

### Pending or Submitted Batches screen – Success message

Voya PayCloud

Voya PayCloud Home > Pending/Submitted Batches

ABC INDUSTRIES - 551213

Please select Batch Type

**Your contributions batch file has been added to the list of pending batches below.**

Batch Type: Pending Batches

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

Batch Name	Batch Type	Payroll Date	Status	Scheduled Date	Division/Location	EE PRE TAX	
<input type="radio"/> testbatchtoday	Contributions	2021-11-14-1	Ready to Post		0001 HARDWOODS SP...	6.00	Edit   Print   Delete
<input type="radio"/> AutoCont Test	Contributions	2021-11-11-5	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutoCont Test	Contributions	2021-11-11-3	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutoCont Test	Contributions	2021-11-11-2	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutoCont Test	Contributions	2021-11-11-1	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutoCont Error	Contributions	2021-11-10-5	Ready to Post		0001 HARDWOODS SP...	1.00	Edit   Print   Delete
<input type="radio"/> AutoCont Error	Contributions	2021-11-10-4	Scheduled for Process...	2021-11-11	0001 HARDWOODS SP...	1.00	Edit   Print   Delete
<input type="radio"/> AutoCont Error	Contributions	2021-11-10-3	Scheduled for Process...	2021-11-11	0001 HARDWOODS SP...	1.00	Edit   Print   Delete
<input type="radio"/> AutoCont Error	Contributions	2021-11-10-2	Contains Errors		0001 HARDWOODS SP...	2.00	Edit   Print   Delete
<input type="radio"/> AutoCont Error	Contributions						Edit   Print   Delete

< Back

Run Batch

© 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](#)

## 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

The screenshot shows the Voya PayCloud Home screen for 'ABC INDUSTRIES - 551213'. The page features a header with the Voya logo and 'Voya PayCloud' text, along with 'Help | Exit' links. Below the header, there is a navigation bar with 'Voya PayCloud Home' and 'Change Plan' options. The main content area is titled 'Select an operation from the tiles shown below' and contains a 3x3 grid of tiles:

- Add/Enroll**: Add/Enroll participant
- Participant Update**: View/Update participant information
- Batch Participant Update**: Update multiple participants
- Contributions**: Process contributions to accounts
- Pending/Submitted Batches**: Review batch information
- Loan Repayment**: Process loan repayments
- Contributions/Loan Repayment**: Process a file with contributions and/or loan repayment data
- Bank Information**: Add or update assigned bank
- Administration**: Review and update your settings

At the bottom of the screen, there is a footer section with the following text:

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

© 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](#)

## Pending / Submitted Batches Screen

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

### Pending Batches or Submitted Batches screen

Voya PayCloud Home > Pending/Submitted Batches

ABC INDUSTRIES - 551213

Please select Batch Type

Batch Type  
Pending Batches

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

Search by:  Search

Batch Name	Batch Type	Payroll Date	Status	Scheduled Date	Division/ Location	EE PRE TAX	
<input type="radio"/> testbatchtoday	Contributions	2021-11-14-1	Ready to Post		0001 HARDWOODS SP...	6.00	Edit   Print   Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-11-5	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-11-3	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-11-2	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-11-1	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-10-5	Ready to Post		0001 HARDWOODS SP...	1.00	Edit   Print   Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-10-4	Scheduled for Process...	2021-11-11	0001 HARDWOODS SP...	1.00	Edit   Print   Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-10-3	Scheduled for Process...	2021-11-11	0001 HARDWOODS SP...	1.00	Edit   Print   Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-10-2	Contains Errors		0001 HARDWOODS SP...	2.00	Edit   Print   Delete
<input type="radio"/> AutCont Error	Contributions						Edit   Print   Delete

< Back Run Batch

© 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](#)

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
<b>Search By</b>	Search Options: Batch Name  Batch Type  Payroll Date  Status  Schedule Date  Division/Location  Contribution Total  Loan Total
<b>Search</b>	Ability to enter the search value for the selected Search Option
<b>Batch name</b>	Your name for the batch. Non-editable
<b>Batch type</b>	Contributions  Loans  Combined
<b>Payroll date</b>	Date you entered for the batch. This format is YYYYMM-DD <Sequence Number>. The sequence number is assigned automatically by the system.
<b>Status</b>	Pending batches: Open  Contains errors  Ready to Post  Scheduled  Submitted batches all have status: "Submitted."
<b>Scheduled Date</b>	Will display only for batches scheduled
<b>Division/Location</b>	Will display only for multiple division plans. Display values : Multiple divisions or Specific division code
<b>Contribution Total</b>	Total batch contribution
<b>Loan Total</b>	Total loan

## Screen Options

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

## Pending Batches Funding Details Screen (Remittance Screen)

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

### Pending Batches Funding Details screen

**VOYA**  
FINANCIAL

Voya PayCloud Help | Exit

Voya PayCloud Home > Pending/Submitted Batches > Funding

### ABC INDUSTRIES - 551213

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

Batch Name testbatchtoday	Plan Number 551213	Plan Name ABC INDUSTRIES
Payroll Date 11/14/2021	Payroll Sequence Number 1	User ID kran1993d46b0
Total Contribution 41.00	Total Loan Repayments 0.00	Total Funding Required for ACH/EFT 41.00

Method Of Remitting Fund

ACH Debit

Bank Name JPMC	Account Number 789789789M	ABA Number 123456789
-------------------	------------------------------	-------------------------

Plan Will Initiate Funding

Submit Date

Submit Now

Schedule Date

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

Account Name	Money Source Type	Available Account Balance	Enter Offset Amount
Forfeiture	ROTH ROLL	\$9,947.69	\$0.00
Forfeiture	ROLLOVER	\$9,773.29	\$0.00
Forfeiture	EE PRE TAX	\$04,769.95	\$0.00
Forfeiture	ROTH	\$9,970.79	\$0.00

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

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

[← Back](#)
[Finish](#)

© 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](#)

## 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
<b>ACH Debit</b>	This will be the default if allowed by the plan. Banking information is displayed below for reference.
<b>Plan will initiate Funding</b>	Select this for all other methods for this batch
<b>Submit Now</b>	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
<b>Schedule Date</b>	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
<b>Forfeiture and Prefunded Account Balance</b>	The Forfeiture and Prefunded Account Balance section will display depending on the plan settings
<b>Payroll Calendar</b>	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. <b>Note</b> : This is not applicable for Loan Repayment batch files

### **Forfeiture and Prefunded Account Balance Fund Table**

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

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

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

If the plan does not have multiple Divisions/Locations:

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

If the plan has multiple Divisions/Locations:

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

Entering the Offset Amount:

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

### Screen Options

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

### Pending Batches Submission pop-ups

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

Batch Funding

---

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

Do you wish to continue ?

---

Cancel
OK

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

Batch Funding

---

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

Do you wish to continue ?

---

Cancel
OK

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

## 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
OK

### 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 PayCloud
Help | Exit

---

Voya PayCloud Home > Batch Submission Confirmation

## ABC INDUSTRIES - 551213

✔ Contributions Batch submitted successfully.
Print

Date/Time 11-12-2021 05:25:17	Plan Number 551213	Plan Name ABC INDUSTRIES
Batch Name testbatchtoday	Payroll Sequence Number 1	User ID krani1993d46b0
Payroll Date 11-14-2021	Total Loan Repayments 0.00	Total Funding Required for ACH/EFT 41.00
Method Of Remitting Fund		
Bank Name JPMC	Account Number 789789789M	ABA number 123456789

NOTE- Batch processing information  
ACH Debit- Submit now. Batches submitted successfully on weekends and market holidays, or after 4:00pm ET (or earlier, should the market close for trading prior to 4:00pm ET) on any business day, will not be processed until the following business day.  
Note: Please maintain a copy of your records, either save it using the file operation on the browser's menu or take a print out using the print button

Done

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

### Pending Batches Edits

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

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

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


Voya PayCloud
Help | Exit


Voya PayCloud Home > Pending/Submitted Batches > Payroll


### ABC INDUSTRIES - 551213

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

Batch Name

Payroll Date



Search by: Select  

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


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

[Back](#)

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.

## Contribution Screen





## Payroll Administration

Help | Exit

Payroll Administration Home > Pending/Submitted Batches > Payroll

### ABC INDUSTRIES - 551213

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

Batch Name

Payroll Date

View Error Messages

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

Search by: Select  Q

Name	SSN	Status	Division/Location	Termination Date	Termination Reason	EE PRE TAX	BOTH ROLL	RollOver
ACVH, TYRONYDAN R	xxxxx9605	00-Active And Eligible	0001	11/19/2019	Select	0.00	0.00	0.00
ADFA, ADF Q	xxxxx7233	00-Active And Eligible	0001		Select	0.00	0.00	0.00
AVENDANO-DP, JAMEY M	xxxxx4634	00-Active And Eligible	0001		Select	0.00	0.00	0.00
BADIGERL, RAGHAV	xxxxx3124	00-Active And Eligible	0001		Select	0.00	0.00	0.00
BAUMANN-DP, AVER	xxxxx3591	00-Active And Eligible	0001	12/12/2020	Select	0.00	0.00	0.00
BELAIR-DP, EVERETT	xxxxx3352	00-Active And Eligible	0001	12/12/2020	Select	0.00	0.00	0.00
BENCE-DP, BRANDON	xxxxx6250	00-Active And Eligible	0001	01/01/2018	Select	0.00	0.00	0.00
BLACKER-DP, SHAUN	xxxxx3350	00-Active And Eligible	0001		Select	0.00	0.00	0.00
BONELLI-DP, BUCK	xxxxx7868	00-Active And Eligible	0001		Select	0.00	0.00	0.00
BOURKE-DP, BRYCE	xxxxx2678	00-Active And Eligible	0001		Select	0.00	0.00	0.00
BOYES-DP, HARLAN	xxxxx9862							
Total						12312312.00	2,121,321.00	321321

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

Add Participants from Alternate Location
New Enrollment

Back
Cancel
Save And Continue

© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Screen Options

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

## Scheduled Pending Batch Edits


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

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

## For Pending Loan Batches Only

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

### Error messages screen

**Errors**  Print

Batch: Loan Payroll Date: 2018-01-01

Batch Name: Test Batch1 Payroll Seq: 2

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

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

**Done**

## Screen Options

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

## Error Correction

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

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

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

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



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

## Submitted Batches

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

### Submitted Batches screen

Voya PayCloud

Voya PayCloud Home > Pending/Submitted Batches

ABC INDUSTRIES - 551213

Please select Batch Type

Batch Type  
Submitted Batches

Search by: Select Search

Batch Name	Batch Type	Payroll Date	Status	Division/ Location	EE PRE TAX	ROTH ROLL	
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...	6.00	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	0001 HARDWOODS SP...	60.00	0.00	Print

< 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.](#)

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

OK

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

## Batch Report screen


Voya PayCloud
Help | Exit

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


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

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

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

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

NOTE- Batch processing information  
 Batches submitted successfully on weekends and market holidays, or after 4:00pm ET (or earlier, should the market close for trading prior to 4:00pm ET) on any business day, will not be processed until the following business day.  
 You have chosen to offset your ACH debit with employer funds. Please be advised that the available balance of employer accounts are subject to change and market fluctuation. The available balance could also be reduced by multiple batches submitted on the same day. This may require Voya to request additional funds from you to complete the transaction.

◀ Back
 Print

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

# Loan Repayments

## Overview

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



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

### Home screen


The screenshot shows the home screen of the Voya PayCloud interface. At the top, the VOYA FINANCIAL logo is on the left, 'Voya PayCloud' is in the center, and 'Help | Exit' is on the right. Below the header, it says 'Voya PayCloud Home' and 'ABC INDUSTRIES - 551213' with a 'Change Plan' link. A prompt asks the user to 'Select an operation from the tiles shown below'. The main area contains a 3x3 grid of tiles:

- Add/Enroll:** Add/Enroll participant
- Participant Update:** View/Update participant information
- Batch Participant Update:** Update multiple participants
- Contributions:** Process contributions to accounts
- Pending/Submitted Batches:** Review batch information
- Loan Repayment:** Process loan repayments
- Contributions/Loan Repayment:** Process a file with contributions and/or loan repayment data
- Bank Information:** Add or update assigned bank
- Administration:** Review and update your settings

At the bottom, there is a notice about system availability hours and a copyright notice for 2021 Voya Institutional Plan Services, LLC.

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 PayCloud

Help | Exit

---

Voya PayCloud Home > Loan Repayment

## ABC INDUSTRIES - 551213

To process a loan repayment:

- 1**

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

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

Batch Name	Payroll Date
Test name <span style="float: right; color: red; font-size: 0.8em;">?</span>	11/01/2021 <span style="float: right; font-size: 0.8em;">📅</span>
- 2**

Would you like to upload a file containing participant data?

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

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

---

← Back
Continue

© 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 **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

Voya PayCloud Home > Loan Repayment

## ABC INDUSTRIES - 551213

To process a loan repayment:

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

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

Batch Name:  ? Payroll Date:

Display Active Loans Only

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

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

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

Select a File:

[View Sample File for formatting instructions](#)

[< 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](#)

## 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
<b>Batch Name</b>	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.”
<b>Payroll Date</b>	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.   <b>Note:</b> 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.
<b>Select All Division/Location</b>	Click this box to select all the locations for the batch (if applicable).
<b>Select Division/Location</b>	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.
<b>Display Active Loans Only</b>	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.

## Templates screen

VOYA  
FINANCIAL

Voya PayCloud

Help | Exit

Voya PayCloud Home > Loan Repayment > Templates

### ABC INDUSTRIES - 551213

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

Please be advised that Division/Location column is required.

Existing Template  
Select

Go

Create New Template

Delete

< 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](#)

## Screen Options


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

## Create Template Screen

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

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

## Create Template screen


Voya PayCloud
Help | Exit

Voya PayCloud Home > Loan Repayment > Templates > Create Template

### ABC INDUSTRIES - 551213

Create a new template

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

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

Trailers:  ⓘ
- 4 Now select each column title:
 

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

	A	B	C	D
	Column 1	Column 2	Column 3	Column 4
1	SSN	LN	LA	DIV SUB
2	935968005	001	110.24	0903
3	819993497	001	95.51	0903

< 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](#)

## Fields

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

Field	Description
	"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."
<b>Check Box if Dollar Amounts Have an Implied Decimal</b>	Check this box if the imported file has implicit decimals. If your file has decimals, leave this box unchecked.
<b>Column Headings</b>	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 <b>Not Applicable</b> .


## Screen Options

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

## Map Column Header Screen

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

### Map column header screen - New Template


Voya PayCloud
Help | Exit

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

## ABC INDUSTRIES - 551213

Create new template

**1** Existing Template

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

Headers

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

Trailers

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

**4** Now select each column title:

Add template fields

Field Type

Starting Position

Field Length

Field Name	Starting Position	Field Length	
Social Security Number	5	9	<a href="#">Edit</a>   <a href="#">Delete</a>
Loan Number	15	5	<a href="#">Edit</a>   <a href="#">Delete</a>
Loan Amount	21	5	<a href="#">Edit</a>   <a href="#">Delete</a>

Uploaded Data


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

[Back](#)

© 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](#)

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

### Map column header screen - Existing Template


Voya PayCloud
Help | Exit

Voya PayCloud Home > Loan Repayment > Templates > T11 Template

### ABC INDUSTRIES - 551213

**1** Existing Template

T11

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

Headers: No Headers

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

Trailers: No Trailers

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

**4** Now select each column title:

Field Name	Starting Position	Field Length	
Social Security Number	1	10	<a href="#">Edit</a>   <a href="#">Delete</a>
Loan Number	11	3	<a href="#">Edit</a>   <a href="#">Delete</a>
Loan Amount	15	6	<a href="#">Edit</a>   <a href="#">Delete</a>

Update Data

Uploaded Data

Social Security Number	Loan Number	Loan Amount
696665555	000	3.65
507152275	000	7.54
254354354	000	3.23
684773590	000	2.34
382833864	000	5.43
657696288	000	6.54

< 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](#)

## Existing Template Screen

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

### Existing Template screen

Voya PayCloud

Help | Exit

Voya PayCloud Home > Loan Repayment > Templates > oldTemp Template

ABC INDUSTRIES - 551213

Existing Template

1 oldTemp

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

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

Headers: 1

Trailers: No Trailers

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

4 Now select each column title:

Add template fields

Field Type: Select

Starting Position: Starting Position

Field Length: Field Length

Add Field

Field Name	Starting Position	Field Length
Social Security Number	1	9
Loan Number	10	3

Update Data

Uploaded Data

Social Security Number	Loan Number	Loan Amount
507152275	00	02 75
254354354	00	01 3.2
684773590	00	01 2.3
382833864	00	01 5.4
657696288	00	01 6.5

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](#)

## 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 for possible error messages and their meanings. This step also removes formatting marks from the imported data. If there are no errors, you will be taken to the Loan Input screen
- Click **Save Template** to save the template

## Error Corrections

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

### Error Messages screen

Voya PayCloud Home > Loan Repayment > Templates > TestLoan Template

ABC INDUSTRIES - 551213

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

[View Error Messages](#)

1 Existing Template  
TestLoan

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

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

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

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


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

© 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 **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

**Errors**
 Print


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

Done

## Screen Options

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

## Loan Repayments screen with process loan repayment manually selected


Voya PayCloud
Help | Exit


Voya PayCloud Home > Loan Repayment

### ABC INDUSTRIES - 551213

To process a loan repayment:

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

❗



Display Active Loans Only

- 2 Would you like to upload a file containing participant data?
  - Upload a file  
I have a file with participant(s) data that I would like to import.
  - Process loan repayment manually  
I will manually enter the participant data.

< Back
Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

Field	Description
<b>Batch Name</b>	Enter the batch name. Batch names cannot contain commas. Click the question icon next to the Batch Name for help information. The help information will display in a pop-up and will read "The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas."



Field	Description
<b>Payroll Date</b>	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.
<b>Select All Division/Location</b>	Check this box to select all the divisions/locations in the plan for the batch (may not appear, depending on plan settings).
<b>Select Division/Location</b>	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.
<b>Display Active Loans Only</b>	Click this box to display only active loans in the plan. The system displays this field only if there is more than one loan type. If you uncheck this box and the plan has accounts with a loan status other than active, the batch contains the Loan Status for the applicable accounts.

## Screen Options

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

## Loan Input Screen

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

**Loan Input screen**

**VOYA**  
FINANCIAL

Voya PayCloud Help | Exit

Voya PayCloud Home > Loan Repayment > Loan Payment Details

ABC INDUSTRIES - 551213

**Payment amount**

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

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

**Changing the funding source (temporarily)**

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

*This division/location will not be updated on the participant through the Loan Repayment batch. To permanently change a participant's division/location, use Participant Update.*

Batch Name:  Payroll Date:

Search by:

Name	SSN	Loan #	Principal Balance	Expected Amount	Payment Amount
DEJONG-DR, DONALD	927808951	001	1,044.67	20.00	0.00
DOCKINS-DR, RUDDOLF	706676108	001	527.99	30.06	0.00
GRAINGER-DR, JEAN	235750073	001	50.66	65.91	0.00
HUARD-DR, GABRIEL	265675174	001	2,375.96	63.14	0.00
KONOPKA-DR, TONIE	584613023	001	18,156.93	164.00	0.00
MARLEY-DR, BOYD	163465948	001	1,595.78	59.75	0.00
MART-DR, GROVER	041696437	001	8,769.25	151.02	0.00
PLATT-DR, FREEMAN	019701503	001	34,692.19	504.61	0.00
SEIGLER-DR, ROBBY	574793411	001	43,917.90	507.49	0.00
SIMIEN-DR, AL	531659970	001	12,666.74	321.79	0.00
<b>Total</b>					<b>0.00</b>

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

© 2021 VOA Institutional Plan Services, LLC. All Rights Reserved.  
Voya and VOA logo are registered trademarks of VOA Services Company.  
[Click here for supported browsers](#)

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

## Fields

Field	Description
<b>Payment Amount</b>	The <b>Payoff Amount</b> (if applicable) and <b>Expected Amount</b> 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.
<b>Multiply Payment Amounts by</b>	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 <b>Multiply</b> 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**  
FINANCIAL

Voya PayCloud Help | Exit

Voya PayCloud Home > Loan Repayment > Loan Payment Details

**ABC INDUSTRIES - 551213**

Payment amount Changing the funding source (temporarily)

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

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

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

*This division/location will not be updated on the participant through the Loan Repayment batch. To permanently change a participant's division/location, use Participant Update.*

Batch Name:  Payroll Date:

Search by:

Name ▲	SSN ▼	Loan # ▼	Principal Balance ▼	Expected Amount ▼	Payment Amount ▼
DEJONG-DR, DONALD	927008951	001	1,044.67	20.00	0.00
DOCKING-DR, RUDOLF	706676100	001	\$27.99	30.06	0.00
GRAINGER-DR, JEAN	235750073	001	\$0.66	65.91	45.00
HUARD-DR, GABRIEL	265679174	001	2,375.96	63.14	0.00
KONOPKA-DR, TONIE	504613023	001	10,156.93	164.08	43.00
MARLEY-DR, BOYD	163465940	001	1,595.70	59.75	0.00
MART-DR, GROVER	041696437	001	8,769.25	151.02	0.00
PLATT-DR, FREEMAN	819701503	001	34,692.19	504.61	0.00
SEIGLER-DR, ROBBY	574793411	001	43,917.90	507.49	20.00
SIMIEN-DR, AL	531659970	001	12,608.74	321.79	0.00
<b>Total</b>					<b>108.00</b>

ⓘ

Multiply EXPECTED AMOUNT and populate PAYMENT AMOUNT by

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

## Add Participants from Alternate Location screen

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

### Add Participants from Alternate Location

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

## ABC INDUSTRIES - 551213

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

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

- Select the Div Sub to apply funding to.
 

Select Division/Location to Apply Funding to SSN

0001 HARDWOODS SPECIALTY PRODUCTS

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

Division/Location : 9999

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

Search By SSN
- Search Participant by SSN
 

Search

Social Security Number	Participant Name	
123-45-6/99	1 ES1, 1 ES1 ASD 1	Add
999-99-0002	TAKEOVER 2	Add
999-99-0003	TAKEOVER 3	Add
999-99-0004	TAKEOVER 4, FN 4	Add

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

DONE

© 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.](#)

Select a Div/Sub to apply funding to.

To add a participant to the selected batch:

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

To delete a previously added participant:

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

## Screen Options

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

## Pending or Submitted Batches screen – Success message

### Pending or Submitted Batches screen – Success message

Voya PayCloud Home > Pending/Submitted Batches

ABC INDUSTRIES - 551213

Please select Batch Type

✔ Your loans batch file has been added to the list of pending batches below.

Batch Type  
Pending Batches

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

Search by:

Batch Name	Batch Type	Payroll Date	Status	Scheduled Date	Division/ Location	EE PRE TAX	
<input type="radio"/> AutCont Error	Contributions	2021-11-23-5	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> AutCont Error	Contributions	2021-11-23-3	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> AutCont Test	Contributions	2021-11-23-2	Ready to Post		0001 HARDWOODS SP...	4.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> AutCont Error	Contributions	2021-11-23-1	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> ContLon Batch	Combined	2021-11-19-4	Ready to Post		0001 HARDWOODS SP...	0.30	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> AutCont Test	Contributions	2021-11-19-3	Ready to Post		0001 HARDWOODS SP...	4.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> Test52	Loans	2021-11-15-10	Ready to Post		0001 HARDWOODS SP...	0.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> tst	Combined	2021-11-15-9	Ready to Post		0001 HARDWOODS SP...	10.20	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> Loan11f52021	Loans	2021-11-15-8	Ready to Post		0001 HARDWOODS SP...	0.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>
<input type="radio"/> Template 1	Loans	2021-11-15-7	Ready to Post		0001 HARDWOODS SP...	0.00	<a href="#">Edit</a>   <a href="#">Print</a>   <a href="#">Delete</a>

[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.](#)

## If you're using an Imported Loan File:

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

# Contributions/Loan Repayment File Processing

## Overview

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

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

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

### Home screen

The screenshot displays the Voya PayCloud Home interface. At the top left is the VOYA FINANCIAL logo. The header includes 'Voya PayCloud' and 'Help | Exit'. Below the header, it identifies the user as 'ABC INDUSTRIES - 551213' with a 'Change Plan' link. A prompt asks the user to 'Select an operation from the tiles shown below'. The main area contains a 3x3 grid of tiles:

- Add/Enroll**: Add/Enroll participant
- Participant Update**: View/Update participant information
- Batch Participant Update**: Update multiple participants
- Contributions**: Process contributions to accounts
- Pending/Submitted Batches**: Review batch information
- Loan Repayment**: Process loan repayments
- Contributions/Loan Repayment**: Process a file with contributions and/or loan repayment data
- Bank Information**: Add or update assigned bank
- Administration**: Review and update your settings

At the bottom, there is a notice about system availability hours: Monday through Friday from 7:00 AM - 7:30 PM EST, Saturday from 6:00 AM - 12:00 AM EST, and Sunday from 12:00 PM - 7:00 AM Monday EST. Copyright information for 2021 Voya Institutional Plan Services, LLC is also present, along with a link for supported browsers.

## 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

**VOYA**  
FINANCIAL

Voya PayCloud Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment

**ABC INDUSTRIES - 551213**

Process a file with contributions and loan repayment data.

To process a contributions/loans file:

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

Batch Name  ? Payroll Date (MM/DD/YYYY)

Prefunded Account Contribution What's This?

Participant Account Contribution

Display Active Participants Only

Display All

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

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





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

Display Active Loans Only

[Back](#) Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

## Fields

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

## Screen Options

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

## File Browse

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.

## Contributions/Loan Repayments Import Formatting Rules

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

## Data Fields and Formatting

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

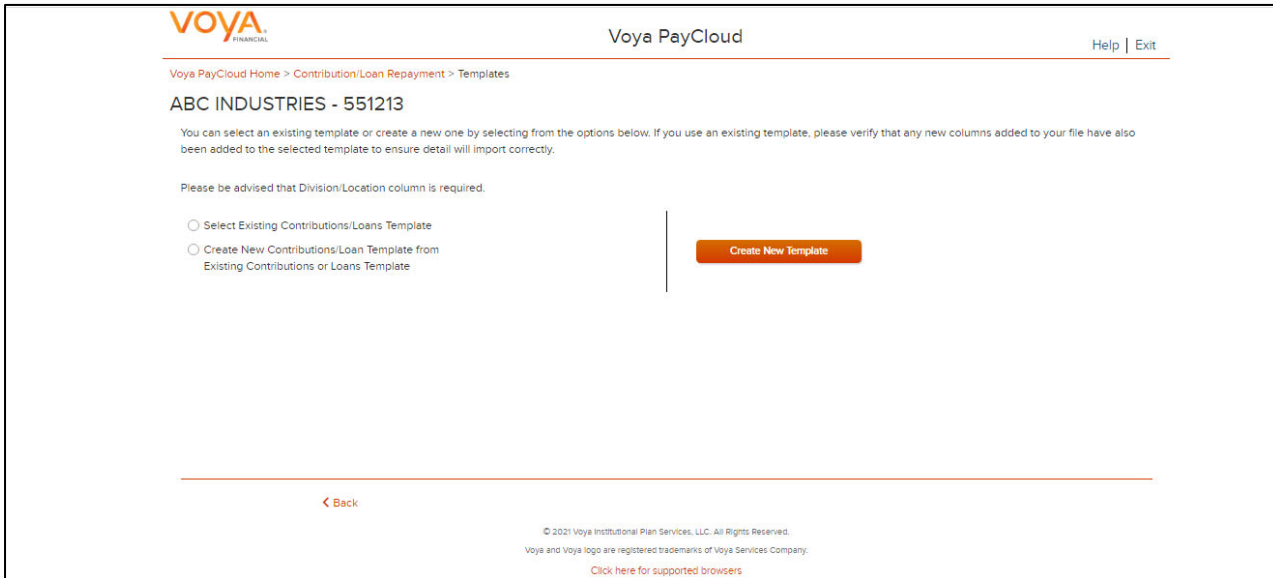
- Participant name is not required.
- Contribution source and Loan Repayment Amount columns:
  - If the file does not contain decimals, please check the box titled, “Check this box if dollar amount in the file do not have decimal points.” when mapping template.
  - Do not include dollar signs or commas.
  - Acceptable formats can either be: 999.99 (explicit decimal) or 99999 (implied decimal, assumes the two digits in the rightmost positions in the cell are cents; use the check box for this format).
- Division codes (if applicable):
  - Maximum 4 digits (valid values based on plan requirements): If you receive the following error message: “Participant not in Authorized Division/Location. Please validate the Division/Location you entered. If you have entered the correct Division/Location, please contact your Plan Manager.”
- Indicate negatives with minus sign to the immediate left of the amount, no parenthesis. For example, -9999.99.
- Negatives contributions are not permitted for loan repayments
- Loan Number
  - Three digits required and must include leading zeros (for example, 001,002,006)
- Refer to the loan amortization schedule for payment amount and loan number
- Loan Repayments: Payments must be the exact payment amount or an exact multiple of the scheduled repayment
- Actual hours-Plan Year to Date (for vesting purposes):
  - Overlay method replaces previous hours
  - Values should be accumulated by Sponsor and submitted to overlay the previous grand total
  - Hours must be submitted in whole numbers and must not exceed 4 digits.
- Anniversary hours (for plan eligibility rules):
  - Overlay method-Values should be accumulated.
  - Hours must be submitted in whole numbers and must not exceed 4 digits.
- Current Hours (Plan year or Anniversary hours):
  - Accumulate option – special set up required. The amount submitted will add to the total that exists on the system.
  - Hours must be submitted in whole numbers and must not exceed 3 digits.
- Termination Date:
  - Acceptable formats : MM-DD-YYYY, MM/DD/YYYY or MMDDYYYY
  - Must contain 8 digits
  - Leading zeros in months must be maintained
- Termination Reason:
  - Valid values:
    - V - Voluntary
    - 1 – With Cause
    - 2 – Laid Off
    - 3 – Special
    - 4 – Retirement
    - 5 – Permanent Disability
    - 6 - Death

## Templates Screen

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

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

## Templates screen



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

## Screen Options

- On choosing the 'Select Existing Contribution/Loan Template' you will be provided with a drop down list of saved combined file templates
  - Click **Go** after selecting an existing template to go to the Existing Template screen
  - 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
  - Contributions
  - 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**

**Fields**

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

Field	Description
	<p>“Select the number of headers contained in the import file. Options include “No Headers” (default), and the values 1-9. When the file is imported, these header fields will be ignored.”</p>
<p><b>From bottom to top, how many rows would you like to remove?</b></p>	<p>Select the number of trailer rows contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.</p> <p>Upon clicking the question icon, the following text will display within a pop-up.</p> <p>“Select the number of trailers contained in the import file. Options include “No Trailers” (default), and the values 1-9. When the file is imported, these trailer fields will be ignored.”</p>
<p><b>Check Box if Dollar Amounts Have an Implied Decimal</b></p>	<p>Check this box if the imported file has implicit decimals. If your file has decimals, leave this box unchecked.</p>
<p><b>Column Headings</b></p>	<p>Select a heading name for each column from the drop-down list. The list consists of the Contributions information including a Termination Date and Termination reason, Loan information i.e. Loan ID, Loan 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 <b>Not Applicable</b>. If Loans are not allowed for the plan, the Loan information is not shown</p>

## Screen Options

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

## Map Column Header Screen

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

### Map column header screen - New Template

Voya PayCloud

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

ABC INDUSTRIES - 551213

Create new template

Existing Template  
 1 New template

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

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

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

4 Now select each column title:

Add template fields

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

Field Name	Starting Position	Field Length	
Social Security Number	5	9	Edit   Delete
EE PRE TAX	15	2	Edit   Delete
ROTH ROLL	18	2	Edit   Delete
ROTH	21	2	Edit   Delete

Update Data

Uploaded Data

Social Security Number	EE PRE TAX	ROTH ROLL	ROTH
65555 000	3	65	7
52275 000	7	54	3
54354 000	3	23	4
73590 000	2	34	2
33064 000	5	43	4
96280 000	6	54	9

< 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](#)

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

<<Map column header screen - Existing Template>>

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

ABC INDUSTRIES - 551213

1 Existing Template  
New template

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

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

4 Now select each column title:  
 Check this box if dollar amounts in file do not have decimal points

Add template fields

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

Field Name	Starting Position	Field Length	
Social Security Number	5	9	Edit   Delete
EE PRE TAX	15	2	Edit   Delete
ROTH ROLL	18	2	Edit   Delete
ROTH	21	2	Edit   Delete

Update Data

Uploaded Data

Social Security Number	EE PRE TAX	ROTH ROLL	ROTH
65555 000	3	65	7
52275 000	7	54	3
54354 000	3	23	4
73590 000	2	34	2
33054 000	5	43	4
98200 000	6	54	9

< 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.](#)

## Existing Template Screen

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

< Existing Template screen >>

## Fields

Field	Description
<b>Existing Template</b>	Template name.
<b>From top to bottom, how many rows would you like to remove?</b>	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."
<b>From bottom to top, how many rows would you like to remove?</b>	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 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 PayCloud

Voya PayCloud Home > Contribution/Loan Repayment > Templates > test Template

ABC INDUSTRIES - 551213

Create a new template

Template last saved on Wednesday, November 17th, 2021 08:40:27 AM

View Error Messages

Existing Template: test

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

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

Headers: No Headers

Trailers: No Trailers

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

Now select each column title:

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

	A	B	C	D	E	F
	Social Security Number	ROLLOVER	EE PRE TAX	Not Applicable	Not Applicable	Not Applicable
1	SSN	ROLLOVER	EE PRE TAX	ER PROFIT	Number of Hours	Anniversary Hrs
2	41174198					
3	76980493	15.00	2.00	18.00	250	50


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 software](#)

## 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

 Print


SSN	Error
XXXXX6188	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:

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

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

Batch Name

Payroll Date

Prefunded Account Contribution What's This?

Participant Account Contribution

Display Active Participants Only

Display All

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

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

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

Display Participants With Contributions

Copy Payroll Data From:

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

Available Sources to Include in Batch

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


---

Display Active Loans Only

< Back
Continue

© 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](#)

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


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment

### ABC INDUSTRIES - 551213

Process a file with contributions and loan repayment data.

To process a contributions/loans file:

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

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

Batch Name

Payroll Date

Prefunded Account Contribution What's This?

Participant Account Contribution

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


Available Sources to Include in Batch

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

< Back
Continue

© 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.](#)

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


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment

### ABC INDUSTRIES - 551213

Process a file with contributions and loan repayment data.

To process a contributions/loans file:

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

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

Batch Name

Payroll Date

Prefunded Account Contribution What's This?

Participant Account Contribution

Display Active Participants Only

Display All

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

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

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

Display Participants With Contributions

Copy Payroll Data From

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






Available Sources to Include in Batch




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

< Back
Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers.](#)

**Fields**

Field	Description
<b>Batch Name</b>	<p>Required field is used for memo purposes only. It allows you to enter a description for the payroll you are creating, so the description name is entirely your decision.</p> <p>Click on question symbol next to the field. The following text will display</p> <p>“The batch name must contain no more than 20 alpha-numeric characters or spaces and cannot include commas.”</p>
<b>Payroll Date</b>	<p>Select the dates using the calendar icon. Payroll dates for the following year (up to January 15) can be submitted from December 15 to 31. Payroll dates after January 15 must be submitted after January 1.</p> <p> <b>Note:</b> Please use the correct plan year payroll date when remitting contributions. The payroll date is used to clarify Current vs. Prior Year contributions as it applies to the IRS Limits.</p>
<b>Prefunded Account Contribution</b>	<p>Select this option to contribute to the Prefunded Account through the contribution batch</p> <p> <b>Note:</b> This option will display depending on the plan settings</p> <p>Clicking on the ‘What’s this?’ link will open the Prefunded Account Guide in a new window</p>
<b>Participant Account Contribution</b>	<p>Select this option to contribute to the Participant Account through the contribution batch</p>
<b>Display Active Participants Only</b>	<p>Select this option to include only active participants in the contribution batch. By default, this will be selected.</p> <p> <b>Note:</b> This option is available for selection only for Participant Account Contribution</p>
<b>Display Active and Ineligible Participants Only</b>	<p>Select this option to include participants which are either in an active status or ineligible status in the contribution batch</p> <p>Clicking on the help icon will display the below text in a pop-up:  “Select this option if you wish to include participants which are either in an active status or an ineligible status.”</p> <p> <b>Note:</b> This option is available for selection (depending on plan settings) only for Participant Account Contribution</p>
<b>Display All Participants</b>	<p>Select this option to include all participants in the contribution batch</p> <p> <b>Note:</b> This option is available for selection only for Participant Account Contribution</p>
<b>Select Division/Location</b>	<p>Changes divisions to display participants. Only divisions that you have prior access to will be selectable. Select the appropriate division (if applicable). Multiple divisions can be selected by clicking on the division name. Selected divisions are displayed with “X” icon. Click the “X” to deselect a division. Selected Divisions are displayed in bold in the dropdown and the user can deselect the same by clicking on the division name. This field is only displayed for plans that maintain different divisions or locations for their participants.</p>
<b>Select All Division/Location</b>	<p>Check this box to select all the divisions/locations in the plan for the contribution batch (may not appear, depending on plan settings).</p>

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

## Screen Options

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

## Participants Screen

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

### Participants screen

**VOYA**  
FINANCIAL

Voya PayCloud Help | Exit

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

### ABC INDUSTRIES - 551213

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

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

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

- Select the Div Sub to apply funding to.  
Select Division/Location to Apply Funding to SSN  
0001 HARDWOODS SPECIALTY PRODUCTS  
*If the participant has transferred to your division/location and the division/location has not yet been updated, please contact the current division/location.*  
Division/Location : 9999  
*If the participant is actively employed in multiple divisions/locations and the primary division/location should be changed to your authorized division/location, please contact your relationship manager.*
- Search By  
Social Security Number
- Search Participant by SSN

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

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

© 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](#)

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

**Contribution screen.**

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



**Contributions/Loan Repayments Input screen – Prefunded Account Contribution**


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment > Payroll

### ABC INDUSTRIES - 551213

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

Batch Name

Payroll Date

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

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


Name ▼	SSN ▼	Status ▼	EE PRE TAX ▼	ROTH ROLL ▼	ROLLOVER ▼	ROTH ▼	TAKEOVER ▼	SH
P	999991001	00-Active And Eligible	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Total			0.00	0.00	0.00	0.00	0.00	0.00

< Back
Cancel
Save And Continue

© 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](#)

**Contributions/Loan Repayments Input screen – Participant Account Contribution**




Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment > Payroll

### MARS ADVERTISING, INC. - 551214

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

**Payment amount**

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

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

**Changing the funding source (temporarily)**

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

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

Batch Name:  Payroll Date:

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

Search by:

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

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

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

< Back
Cancel
Save And Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers.](#)

## Fields

### Prefunded Account Contribution

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

### Participant Account Contribution

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

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

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

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


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

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

## Multiple Division Plans

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

### Contributions/Loan Repayments set up screen – Multiple Division Plan


Voya PayCloud
Help | Exit

Voya PayCloud Home > Contribution/Loan Repayment > Payroll

**MARS ADVERTISING, INC. - 551214**

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

**Payment amount**

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

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

**Changing the funding source (temporarily)**

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

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

Batch Name  
B6

Payroll Date  
10/21/2021

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

Search by: Select Search

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

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

Multiply **EXPECTED AMOUNT** and populate **PAYMENT AMOUNT** by 1 Multiply

Add Participants from Alternate Location
Add Additional Participants
New Enrollment

Back
Cancel
Save And Continue

© 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 **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


Voya PayCloud
Help | Exit

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

## ABC INDUSTRIES - 551213

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

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

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

- 1 Select the Div Sub to apply funding to.
 

Select Division/Location to Apply Funding to SSN
- 2 Search By
- 3 Search Participant by SSN

Social Security Number	Participant Name	
123-45-6799	TEST, TEST ASD T	<a href="#">Add</a>
999-99-0002	TAKEOVER 2	<a href="#">Add</a>
999-99-0003	TAKEOVER 3	<a href="#">Add</a>
999-99-0004	TAKEOVER 4, FN 4	<a href="#">Add</a>

© 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](#)

Select a Div/Sub to apply the funding to.

To add a participant to the selected batch:

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

To delete a previously added participant:

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

## Screen Options

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

## Add Additional Participants Screen

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

### Add Additional Participants Screen

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

ABC INDUSTRIES - 551213

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

Search By  
1 Social Security Number

2 Search Participant by SSN **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.  
Voya 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


Voya PayCloud
Help | Exit

Voya PayCloud Home > Pending/Submitted Batches

### ABC INDUSTRIES - 551213

Please select Batch Type

✔ Your combined batch file has been added to the list of pending batches below.

Batch Type

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

Search by:

Batch Name	Batch Type	Payroll Date	Status	Scheduled Date	Division/Location	EE PRE TAX	
<input type="radio"/> AutCont Error	Contributions	2021-11-23-5	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit   Print   Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-23-3	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit   Print   Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-23-2	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> AutCont Error	Contributions	2021-11-23-1	Scheduled for Process...	2021-11-24	0001 HARDWOODS SP...	2.00	Edit   Print   Delete
<input type="radio"/> ContLon Batch	Combined	2021-11-19-4	Ready to Post		0001 HARDWOODS SP...	0.30	Edit   Print   Delete
<input type="radio"/> AutCont Test	Contributions	2021-11-19-3	Ready to Post		0001 HARDWOODS SP...	4.00	Edit   Print   Delete
<input type="radio"/> tst	Combined	2021-11-15-9	Ready to Post		0001 HARDWOODS SP...	10.20	Edit   Print   Delete
<input type="radio"/> Loan11152021	Loans	2021-11-15-8	Ready to Post		0001 HARDWOODS SP...	0.00	Edit   Print   Delete
<input type="radio"/> Template 1	Loans	2021-11-15-7	Ready to Post		0001 HARDWOODS SP...	0.00	Edit   Print   Delete
<input type="radio"/> B521	Combined	2021-11-15-6	Ready to Post		0001 HARDWOODS SP...	74.00	Edit   Print   Delete

[← 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](#)

### When Importing a Contributions/Loan Repayments File:

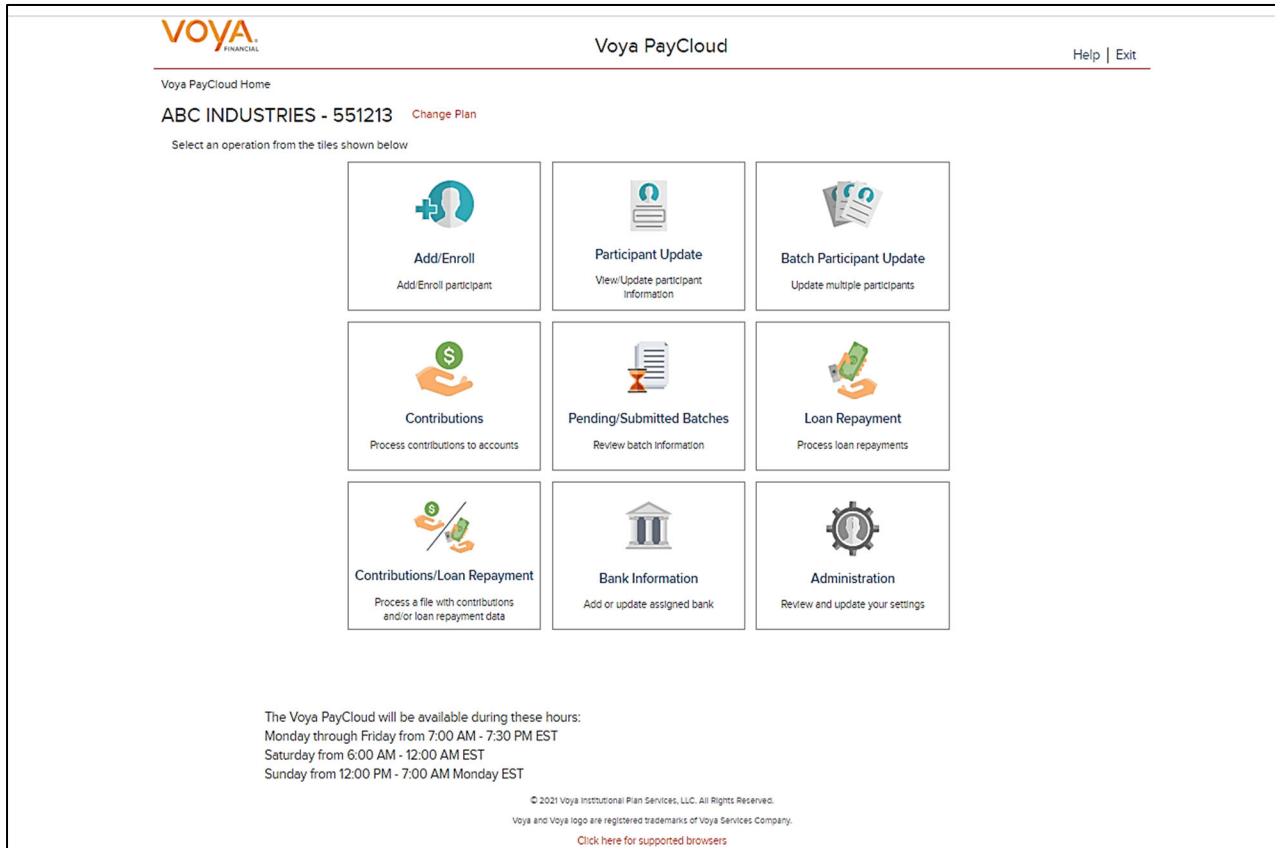
- The Contribution Input screen will also display the message “Your file has been successfully imported.”
- If the “Display Active Participants Only” box is unchecked, all participants not included in the imported file but found in the recordkeeping system will be displayed.
- Select **Continue** to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

# Bank Information

## Overview

If your selected plan is set up for ACH transmission then you will see a **Bank Information** tile on the Home screen. If you do not see a link, check with your Voya plan manager to change your bank information.


### Home screen



## Bank Information Screen

To add or modify bank information, click the Bank Information tile on the Home screen. Current bank information will be displayed. You will then have the ability to modify or add bank information as needed. Please review the policies and restrictions noted on the bottom of the Bank Information screen.

### Bank Information screen


Voya PayCloud
Help | Exit

Voya PayCloud Home > Edit Bank Information

### ABC INDUSTRIES - 551213

Please update the existing bank information as needed.

Bank Name

Bank Address (Optional)

Bank Address2 (Optional)

Bank City

Bank State

Bank Zipcode(Optional)

Routing Number

Confirm Routing Number

Account Number

Confirm Account Number

Account Type  
 Saving  
 Checking

Please remember the following when adding or changing the bank account:

- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.
- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day; past payments for prior-invested transactions will not be affected.
- Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

← Back
Continue

© 2021 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for recommended browsers.](#)

## Fields

Field	Description
<b>Division/Location</b>	Display Division/Location for the selected plan (If applicable)
<b>Apply Banking Info to All Divisions/Locations</b>	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.
<b>Bank Name</b>	Enter the bank's name
<b>Bank Address 1</b>	Enter the bank's street address.
<b>Bank Address 2</b>	Enter the bank's street address.
<b>Bank City</b>	Enter the bank's city.
<b>Bank State</b>	Select the bank state from the drop-down list.
<b>Bank ZIP Code</b>	Enter the ZIP or postal code for the bank address.
<b>Routing Number</b>	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.



Field	Description
Confirm Routing Number	Re-enter the bank's routing number.
Account Number	Enter the bank's account number. You can click on the question symbol for help text. Routing and Account number help pop-up will display. See screen below.
Confirm Account Number	Re-enter the bank's account number.
Account Type	Select Checking or Saving

## Screen Options

- Click **Back** to return to the Home screen
- Click **Cancel** to go the Home screen
- Click Continue to go to the Bank Information Verification screen

### Routing Number and Account Number

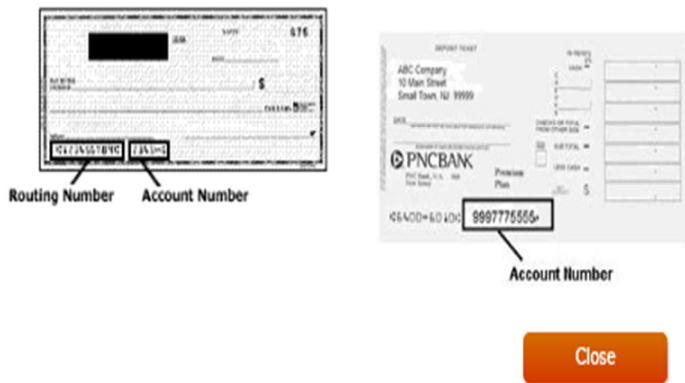
#### Help Locating the Routing Number and Account Number

The **Routing Number** is a 9 digit number that identifies your bank. It is usually located to the left of the account number at the bottom of a check. If you are using an account other than checking, contact your bank for the proper Bank Routing Number.

The **Account Number** is your checking or savings account number at your financial institution. It is usually located to the right of the Routing Number at the bottom of a check or savings deposit slip. Disregard any spaces or dashes in the middle.

Note: The check number is also printed at the bottom of the check but it should **not** be included as part of your account number.

Please refer to the check and savings deposit samples below to assist you in locating the Routing Number and Account Number.



## Alert

Please remember the following when changing the bank account:

- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.

- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day; past payments for prior-invested transactions will not be affected.

## Bank Information Screen – Multiple Division Plan

If ACH debit is active for your plan and/or division, the banking information will be displayed by division. Click **Edit** or **Add Bank** as needed to modify the information on file. Bank Information can be sorted by clicking on the column header. An upward orange arrow indicates sorting of the column in ascending order and a downward orange arrow indicates sorting of the column in descending order.

### Bank Information screen – Multiple division plan with/without banking information

Voya PayCloud Home > Bank Information

MARS ADVERTISING, INC. - 551214

Bank Information is shown below for each division associated with your plan. You may add new bank information or edit existing bank information for any division/location shown.

Search by:

Division/Location Number	Division/Location Name	Bank Name	Account	Actions
0001	MARS ADVERTISING, INC.	TestBank12345	Savings	<a href="#">Edit</a>
1001	MERCURY FULFILLMENT SYSTEMS, INC	TestBank12345	Savings	<a href="#">Edit</a>
1002	EMARKETING, LLC	TestBank12345	Savings	<a href="#">Edit</a>
1003	TPA, LLC	TestBank12345	Savings	<a href="#">Edit</a>
1004	TWIN OAKS, LLC	TestBank12345	Savings	<a href="#">Edit</a>
1005	MARS ADVERTISING, INC.	TestBank12345	Savings	<a href="#">Edit</a>
1006	NOMADIC LLC	TestBank12345	Savings	<a href="#">Edit</a>

[← 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](#)

## Screen Options

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

### Add Bank pop-up

## Add Bank

Please remember the following when adding or changing the bank account:


- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.
- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day; past payments for prior-invested transactions will not be affected.
- Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

Cancel

Continue

## Edit Bank Information Screen

### Edit Bank Information screen



## Voya PayCloud

[Help](#) | [Exit](#)

Voya PayCloud Home > Edit Bank Information

### ABC INDUSTRIES - 551213

Please update the existing bank information as needed.

<p>Bank Name <input type="text" value="DCU_Test"/></p> <p>Bank Address (Optional) <input type="text" value=""/></p> <p>Bank Address2 (Optional) <input type="text" value=""/></p> <p>Bank City <input type="text" value="Marlborough"/></p> <p>Bank State <input type="text" value="MA"/></p> <p>Bank Zipcode(Optional) <input type="text" value="01752"/></p>	<p>Routing Number <input style="border: 1px solid red;" type="text" value="211391825"/></p> <p>Confirm Routing Number <input type="text" value="211391825"/></p> <p>Account Number <input style="border: 1px solid red;" type="text" value="44279999"/></p> <p>Confirm Account Number <input type="text" value="44279999"/></p> <p>Account Type  <input type="radio"/> Saving  <input checked="" type="radio"/> Checking                 </p>
--	---

Please remember the following when adding or changing the bank account:

- Do not make more than one bank account change per business day as all pending payments are drawn from the latest updated account at the close of business for all transactions submitted for the investment date.
- Funding for future-dated scheduled batches comes from the bank that Voya has on record at the time that the investment is scheduled to take place. Interim changes to bank information could disrupt the intended debit transaction.
- If you have a need to utilize multiple bank accounts on a regular basis, contact Voya to discuss alternative solutions to your current process.
- Updating the bank account will impact all contribution payments submitted today as well as pending contributions submitted after 4:00 p.m. the prior business day; past payments for prior-invested transactions will not be affected.
- Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

< Back
Continue

© 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 **Back** to go to Bank Information Screen
- Click **Cancel** to go to the Home Screen
- Click **Continue** to go to the Bank Information Verification Screen

## Bank Information Verification Screen

### Bank Information verification screen


Voya PayCloud
Help | Exit

Voya PayCloud Home > Edit Bank Information > Verify Changes

### ABC INDUSTRIES - 551213

Please verify the following bank information:  
NOTE that the operation will not be complete until you click SUBMIT.

Bank Name	Routing Number
DCU_Test	211391825
Bank Address	Account Number
Marlborough, MA 01752	44279999
	Account Type
	Checking

By providing the bank account information above, the Plan Sponsor/Trustee acknowledges and affirms their agreement with terms and conditions previously agreed to regarding ACH Debit and authorizes Voya, on receipt of a payroll in an approved format, to debit from the account(s) listed the amount necessary to fund the contributions stated in the payroll submission. I agree to abide by those terms and conditions and by any instructions provided by Voya regarding the use of this service. Termination of this service will be effective upon Voya's receipt of a written termination request.

Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

< 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](#)

## Screen Options

- Click **Back** to return to the Edit Bank Information Screen
- Click **Cancel** to go to the Home Screen
- Click **Submit** to save the Bank Information details. Bank Information confirmation pop-up is displayed

## Bank Information Confirmation

### Bank information confirmation pop-up

Bank Information Successfully Submitted


---

This is to confirm that ACH debit has been established for your plan. All electronic detail files remitted to Voya will result in a debit from the designated bank account. Submissions received by the close of the NYSE will be used for same day processing.

Prior to your first debit, please verify with your bank that Voya is authorized to debit your account. Voya's company ID is 8602739614.


## Screen Options

- 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 PayCloud
Help | Exit

Voya PayCloud Home > Edit Bank Information > Verify Changes

### ABC INDUSTRIES - 551213

 Print

✔ Bank Information successfully created on 11/23/2021 at 12:26:42 PM.

Bank Name	Routing Number
JPMC	211391825
Bank Address	Account Number
Marlborough, MA 01752	44729999
	Account Type
	Checking


By providing the bank account information above, the Plan Sponsor/Trustee acknowledges and affirms their agreement with terms and conditions previously agreed to regarding ACH Debit and authorizes Voya, on receipt of a payroll in an approved format, to debit from the account(s) listed the amount necessary to fund the contributions stated in the payroll submission. I agree to abide by those terms and conditions and by any instructions provided by Voya regarding the use of this service. Termination of this service will be effective upon Voya's receipt of a written termination request.

Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

< Back
Go To Homepage


© 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](#)

### Bank Information Confirmation screen


Voya PayCloud
Help | Exit

Voya PayCloud Home > Bank Information Confirmation

### ABC INDUSTRIES - 551213

 Print

✔ Bank Information successfully created on 11/23/2021 at 12:26:42 PM.

Bank Name	Routing Number
JPMC	211391825
Bank Address	Account Number
Marlborough, MA 01752	44729999
	Account Type
	Checking

By providing the bank account information above, the Plan Sponsor/Trustee acknowledges and affirms their agreement with terms and conditions previously agreed to regarding ACH Debit and authorizes Voya, on receipt of a payroll in an approved format, to debit from the account(s) listed the amount necessary to fund the contributions stated in the payroll submission. I agree to abide by those terms and conditions and by any instructions provided by Voya regarding the use of this service. Termination of this service will be effective upon Voya's receipt of a written termination request.

Prior to your first debit, please verify with your bank that 8602739614 is authorized to debit your account.

< Back
Go To Homepage

© 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 **Go To Homepage** to go to the Home screen




# Reports

## Overview

The Reports section of Voya PayCloud updates when a participant changes his or her contribution deferral percent. Once created, the files will be placed in a database/directory readable by the Voya PayCloud application. Voya PayCloud provides printable copies of these reports and maintains an archive of past reports. These reports can be used to update the payroll system. This feature may not be available for all plans. Please check with your Account Manager for more details. Click on the Reports tile on the Home screen to go to the Report Selection screen.










## Home screen


Voya PayCloud
Help | Exit

Voya PayCloud Home

**ABC INDUSTRIES - 551213** [Change Plan](#)

Select an operation from the tiles shown below


 <b>Add/Enroll</b> Add/Enroll participant	 <b>Participant Update</b> View/Update participant information	 <b>Batch Participant Update</b> Update multiple participants
 <b>Contributions</b> Process contributions to accounts	 <b>Pending/Submitted Batches</b> Review batch information	 <b>Loan Repayment</b> Process loan repayments
 <b>Contributions/Loan Repayment</b> Process a file with contributions and/or loan repayment data	 <b>Bank Information</b> Add or update assigned bank	 <b>Administration</b> Review and update your settings

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

© 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](#)

## Reports selection screen





## Payroll Administration


Help | Exit

---

Payroll Administration Home > Reports

### ABC INDUSTRIES - 551213

FBAK20130328-230333

Print 

**ABC INDUSTRIES**  
 Bi-Weekly Deferral Change Report

Run Date  
 03/28/2013

Run Time  
 23:03:33

Search by: Select

Name	Part Id	Eligibility Date	Before Tax %	After Tax %	Catchup %
ARA	116563159	20120501	06.00	00.00	
RIV	118660702	00000000	04.00	00.00	
LAY	122942870	20130701	02.00	00.00	

[← Back](#)

© 2019 Voya Institutional Plan Services, LLC. All Rights Reserved.  
 Voya and Voya logo are registered trademarks of Voya Services Company.  
[Click here for supported browsers](#)

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