

How to ADD NEW EMPLOYEES so they can utilize Online Enrollment?

Please follow these steps below:

1. Access the **Payroll Center** on the <https://www.yourbenefitaccount.net/yourfutureisdaily> website
2. Click on the **Process Selection** dropdown, and select the "**Demographic**" option
3. Choose a **Process Method** for getting your new employee(s) into the system
 - 3a. "**Upload a file containing the demographic data**" and click Next (see 4a below)
 - OR ---
 - 3b. "**Manually enter new employee information**" and click Next (see 4b below)
4. Depending on the Process Method you just chose in Step 3 above, you will do one of the following:
 - 4a. **File Upload Method** - **Browse for the demographics file you want to upload.** If your file is using a Header row (column descriptions), you will need to check the box to "**Skip first record (Header Record)**" and then click Next. Your new employees will be displayed on the next screen. Click **Next** if everything looks good. You will now see the results of the data import. Click **Complete**.
 - 4b. **Manual Entry Method** - Click the "**Add New**" button. **Enter the appropriate data in each of the fields. Repeat as needed** for each new employee you want to add during this process. Once you have the data for all new employees entered on this screen, click **Next**. You should now see the results of the data import (manual entry). Click **Complete**.
5. **Send an email to Jesse Piercy at TPP at jpiercy@tppkc.com and copy the advisor that services your district** to let them know your new employees are entered and ready for online enrollment. If you are not certain of which advisor services your district, please instead just copy Luke McKee at lmckee@compassfr.us.

Using the "File Upload Method"

#1

The screenshot shows the top navigation bar of the 'your future is daily' system. The 'Payroll' menu item is circled in red. A dropdown menu is open, showing options: 'Payroll Center', 'Payroll File Layout', 'Upload File', and 'Transaction Entry'. The 'Upload File' option is highlighted. The background shows a 'Plan Summary by Investment' page with a table of plan details.

| | |
|------------------------------|---|
| Plan year | 07/01/2020 - 06/30/2021 |
| Plan contact/File attachment | Jesse Piercy <jpiercy@tppkc.com> |
| Top heavy this year | This plan is not top heavy for the current plan year. |
| Payroll is processed | Monthly |

#2

The screenshot shows the 'Data Validation Center' page. The 'Process selection' dropdown menu is circled in red, with 'Demographic' selected. Below the dropdown, the 'Upload a file containing the demographic data' radio button is selected. A 'DATA FORMAT' button is visible. In the bottom right corner, a 'NEXT' button is circled in red.

Using the "File Upload Method" (continued)

Home

Data Validation Center

Play Play All Print

Process selection

Demographic

Process Method:

Upload a file containing the demographic data

Manually enter new employee information

DATA FORMAT

Work with existing demographic file

NEXT

#3a

Home

Data Validation Center

Play Play All Print

Overall Progress: 25% Complete

FILE UPLOAD

Process format

DVC ESSDACK Add New Employo...

DATA FORMAT

Select File

Demographics - Add New Employee import

SELECT FILE

Skip first record (Header Record)

Skip last record (Trailer Record)

Preview file

Enter a Requested ACH Pull Date and/or any Special Instructions below.

(ACH will be pulled using current processing date if not otherwise specified)

START OVER

BACK

NEXT

#4a

Using the "File Upload Method" (continued)

#4a
cont'd

Data Validation Center Play Play All Print

Overall Progress: **50% Complete**

Edit Data

Save Undo Delete Refresh Add All Add New Add Existing Validate Records Print Errors Print Grid Download

333999999, Anderson, John

File(s)
All Files CLEAR FILTERS

| New | Status | Social Security Num... | Name - First | Name - ... | Date of Birth | Date of Hire - Original | Addr |
|-----|--------|------------------------|--------------|------------|---------------|-------------------------|--------|
| Yes | Valid | 333999999 | John | Anderson | 07/19/1972 | 08/01/2012 | 613 S. |

<< < Page 1 of 1 > >> 20 items per page

Severity Error

START OVER BACK NEXT

Using the "File Upload Method" (continued)

Data Validation Center Play Play All Print

Overall Progress: **75% Complete**

Totals

File Import Results PRINT REPORT

Import Census Report

| | |
|------------------------|---|
| Job Status: | Warnings |
| Plan ID: | ESSDACK |
| Plan name: | ESSDACK Consortium 403(b) Retirement Plan |
| DER name: | DVC ESSDACK Add New Employee |
| Mode: | Validate Only |
| Transfer processed on: | 04/24/2021 |
| Execution Errors | |
| None | |
| Special Instructions | |

There were no notes assigned to this job.

| | |
|----------------------------------|---|
| Existing employees updated: | 0 |
| New employees added: | 1 |
| Total employees transferred: | 1 |
| Total employees NOT transferred: | 0 |
| Client import errors: | 0 |
| Oracle server import errors: | 0 |

List of new employees

| SS # | Last Name | First Name |
|----------|-----------|------------|
| *****999 | Anderson | John |

Validation Rules

| SSN | LASTNAME | FIRSTNAME | DESCRIPTION | SEVERITY |
|----------|----------|-----------|---|----------|
| *****999 | Anderson | John | Update Actual Payroll Frequency for Loans to Semi-Monthly (S) | Warning |

General Validation Messages

File Submission

Submit for final processing

Process another file

START OVER BACK COMPLETE

#4a
cont'd

#5

Send an email to Jesse Piercy at TPP at jpiercy@tppkc.com and copy the advisor that services your district to let them know your new employees are entered and ready for online enrollment. If you are not certain of which advisor services your district, please instead just copy Luke McKee at lmckee@compassfr.us.

Using the "Manual Entry Method"

#1

The screenshot shows the top navigation bar of the 'your future is daily' system. The 'Payroll' menu item is circled in red. Below the navigation bar, the 'Plan Summary by Investment' page is visible. A dropdown menu is open under 'Payroll', with 'Transaction Entry' highlighted. The page also displays a table with plan details such as 'Plan year', 'Plan contact/File attachment', and 'Payroll is processed'.

#2

The screenshot shows the 'Data Validation Center' page. The 'Process selection' dropdown menu is open, and 'Demographic' is selected and highlighted. Below the dropdown, there are three radio button options: 'Upload a file containing the demographic data' (selected), 'Manually enter new employee information', and 'Work with existing demographic file'. A 'DATA FORMAT' button is visible next to the 'Manually enter...' option. The 'NEXT' button at the bottom right is circled in red.

Using the "Manual Entry Method" (continued)

Home

Data Validation Center

Play Play All Print

Process selection

Demographic

Process Method:

Upload a file containing the demographic data

Manually enter new employee information

DVC ESSDACK Add ...

DATA FORMAT

Work with existing demographic file

NEXT

#3b

Data Validation Center

Play Play All Print

Overall Progress: 0% Complete

Edit Data



Save

Undo

Delete

Refresh

Add All

Add New

Add Existing

Validate Records

Print Errors

Print Grid

Download

File(s)

All Files

CLEAR FILTERS

| New | Status | Social Security Num... | Name - First | Name - ... | Date of Birth | Date of Hire - Original | Addi |
|-----|--------|------------------------|--------------|------------|---------------|-------------------------|------|
|-----|--------|------------------------|--------------|------------|---------------|-------------------------|------|

| | | | | | | | |
|-----|-----|--|--|--|--|--|--|
| Yes | New | | | | | | |
|-----|-----|--|--|--|--|--|--|

Page 1 of 1 20 items per page

Severity Error

START OVER

BACK

NEXT

#4b

Using the "Manual Entry Method" (continued)

Data Validation Center Play Play All Print

Overall Progress: **75% Complete**

Totals

File Import Results PRINT REPORT

Import Census Report

| | |
|------------------------|---|
| Job Status: | Warnings |
| Plan ID: | ESSDACK |
| Plan name: | ESSDACK Consortium 403(b) Retirement Plan |
| DER name: | DVC ESSDACK Add New Employee |
| Mode: | Validate Only |
| Transfer processed on: | 04/24/2021 |
| Execution Errors: | None |
| Special Instructions: | |

There were no notes assigned to this job.

| | |
|----------------------------------|---|
| Existing employees updated: | 0 |
| New employees added: | 1 |
| Total employees transferred: | 1 |
| Total employees NOT transferred: | 0 |
| Client import errors: | 0 |
| Oracle server import errors: | 0 |

List of new employees

| SS # | Last Name | First Name |
|----------|-----------|------------|
| *****999 | Anderson | John |

| Validation Rules | SSN | LASTNAME | FIRSTNAME | DESCRIPTION | SEVERITY |
|------------------|----------|----------|-----------|---|----------|
| *****999 | Anderson | John | | Update Actual Payroll Frequency for Loans to Semi-Monthly (S) | Warning |

General Validation Messages

File Submission

Submit for final processing

Process another file

START OVER BACK COMPLETE

#4b
cont'd

#5

Send an email to Jesse Piercy at TPP at jpiercy@tppkc.com and copy the advisor that services your district to let them know your new employees are entered and ready for online enrollment. If you are not certain of which advisor services your district, please instead just copy Luke McKee at lmckee@compassfr.us.