

What	When	Who
Review payroll process	Week 4-5	Plan Sponsor and TAG
Remit first regular payroll file	Day 60	Plan Sponsor and TAG
Set up automated payroll feeds	Day 60-90	Plan Sponsor, TAG and JH

WHAT EMPLOYEE DATA IS REQUIRED:

Mandatory for effective employee web access and enrollment

Name

Social Security number

Home address

Date of birth

Employer provided email address

Provides optimal participant experience, plan services and annual reviews

Employment status and effective date

Eligibility date and indicator

Pretax or after-tax contribution (\$ or %)

Hire date

Base salary