

**Pre-Payroll Checklist**

We recommend the following tasks be completed prior to submitting payroll each pay period:

* **Run a “Changes to Contribution Rate” report from Transamerica’s website**

This will help ensure new enrollment and deferral changes are included on the file upload. Please see the Employer “Reports” tab.

* **Run a “Loans Issued” report from Transamerica’s website**

This will help ensure new loans are established and payments will begin in a timely manner and in accordance with the amortization schedule. Please see the Employer “Reports” tab.

* **Add new hires**

Full census data for all employees receiving W-2 compensation should be included on first payroll following hire date. \*

* **Add Rehire dates**

All employees who were terminated and have returned to company need to be included.

* **Add Termination dates**

Termination dates should be included.

* **DO NOT ADD TERM DATES if…**

Employee is transferred/moved to another company or department within the company or control group.

Notify Pinnacle and Transamerica via email to [Contributions@pfslink-e.com](mailto:Contributions@pfslink-e.com) and [Theresa.Mackey@transamerica.com](mailto:Theresa.Mackey@transamerica.com) to remove a Termination Date that was erroneously included on a payroll file. Termination dates can only be removed manually.

\***Not including employee data on first payroll file submitted may result in employee not receiving enrollment kit, other information regarding the plan and possibly result in compliance issues.**