

Employer Registration Checklist



Adding a Delegate(s)

Select **My delegates** from the left navigation bar on your dashboard, then select **Add a delegate**. Complete all fields with the required information (name, work email, phone number, and physical/ mailing address) and click Next. Then, select the payrolls to which the delegate should have access (entire company or specific payrolls), leave a note if needed, and click Next. Finally, select a level of authorization for the Delegate and click Next. On the Review page you'll be given the opportunity to confirm your information. Select Previous to make edits or Submit to receive your confirmation number. **See page 19 in your Employer Handbook for more details on Delegates.**



Add a Payroll Representative(s)

Select **My payroll representative** from the left navigation bar on your dashboard, then select **Add a payroll representative**. When you confirm your payroll will not be submitted by an internal person, you'll be given the opportunity to enter the company's name and representative's information (email, name, phone number). Click **Next** to continue. Then, answer several questions regarding how the representative will be interacting with your account and click **Next**. On the Review page you'll be given the opportunity to confirm your information. Select **Previous** to make edits or **Submit** to receive your confirmation number. **See page 14 in your Employer Handbook for more details on Adding a Payroll Representative.**



Creating a Payroll List

Select **My Payrolls** from the left navigation bar on your dashboard and select **Add new payroll**. First, enter your company locations in Illinois. After you enter each location, click **Save**. Once all locations are entered, or you've entered what you need, click **Next** to continue. On the next page, select a location and complete the required information (compensation type, pay cycle, start date, payroll name). Click **Add** once you've entered everything for this payroll. You can then select another location to create another payroll list or click **Next** to continue. On the Review page you'll be given the opportunity to confirm your information. Select **Previous** to make edits or **Submit** to receive your confirmation number. **See page 29 in your Employer Handbook for more details on Payroll Lists.**



Adding an Employee(s)

Select **My employees** from the left navigation bar on your dashboard. Then, click **Add new employee(s)**. You can choose to add employees manually or upload an Excel file with the required information.

- **Manual Entry** Select the radio button next to **I will type information on the next page**, then select **Next**. Enter the information outlined for the employee you are adding and continue through the pages until you **Submit** and receive your confirmation number.
- **Upload a File** Select the radio button next to **I will upload information on the next page**, then select **Next**. **Download** the Excel spreadsheet and enter your information following the **Formatting Tips** provided in Step 2 and save your document. Then you can click **Choose a file**, select your file from its saved location, and click **Upload**. Select **Submit** to complete the upload and receive your confirmation number. **See page 34 in your Employer Handbook for more details on Uploading a file.**





Adding Bank Information

Select **Bank information** from the left navigation bar on your dashboard. An Administrator or Contact Person may add a bank by selecting **Add**. Complete all fields (routing number, bank name, bank account number and account type) and check the box to confirm that your ACH transactions will not involve a bank or other financial services company, including any branch or office thereof, located outside the territorial jurisdiction of the United States. Select **Next**, review the information to confirm that it is accurate, then select **Submit** to complete and receive a confirmation number. **See page 27 in your Employer Handbook for more details on Adding Bank Information.**



Managing contributions

Select **Manage contributions** from the left navigation bar on your dashboard. This page will allow you to review **pending contribution rate updates** made by employees, send **new contributions**, and view **past contributions**. When you're ready to send contributions select the **Payroll list** and enter the **Pay date**. If applicable, check the box below **Pay date** to indicate that a more recent payroll contribution to Illinois Secure Choice has already been submitted for this payroll list. Then select **Begin entering contributions**. You can then choose to provide details on employees manually or upload an Excel file with the required information. **See page 56 in your Employer Handbook for more details on Sending Contributions.**

- **Sending Contributions** There are several method options for Sending new contributions:
 - **Bank Account (ACH Pull)** Upload contributions for a payroll list into the portal (either manually or with the payroll file) and select **ACH Pull** If the payroll is uploaded before 4 PM EST, it starts the 3 business-day process outlined below. If payroll upload occurs after 4 PM EST, the payroll file will hold and the process will begin the next day.
 - **ACH Push** Upload contributions for a payroll list into the portal and select **ACH Push**. On the confirmation screen, the system will display the routing and account number you will need to send the funds to the program.
 - **Wire** Upload contributions for a payroll list into the portal, select **Wire**. Wire instructions with the routing and account numbers for your Illinois Secure Choice portal will appear on the confirmation page
 - **Check (payable to Illinois Secure Choice)** Enter payroll information and select **Check**. A mailing address and the funding reference number which you will need to write on the check will appear on the confirmation page. Mail to:
Illinois Secure Choice
P.O. Box 56000
Boston, MA
02205-6000

See pages 57, 58 in your Employer Handbook for details on sending contributions methods.

- **Manual Entry** Select the radio button next to **I will type my amounts on the next page**, then select one of the radio buttons indicating how you will send the funds to Illinois Secure Choice (debit the account on file, enter bank information for one-time use, send money via ACH, wire the funds, mail a check). Select **Next** and enter the **Total contribution** amount and the amount for each employee. If you are not making a contribution for an employee, the contribution field should be left blank or \$0.00 should be entered. Employees highlighted in **green** have been recently added or reactivated to the payroll. Employees highlighted in **gold** indicate that the employer has not acknowledged that they are aware of the Employee's contribution rate. Select **Next** to go to the review page and select **Submit** to receive your confirmation number and funding reference number. **See page 60 in your Employer Handbook for more details on Sending Contributions.**





• **Upload a File** Select the radio button next to **I will upload an Excel spreadsheet**, then select one of the radio buttons indicating how you will send the funds to Illinois Secure Choice. Select **Next. Download** the Excel spreadsheet and enter your information following the **Formatting Tips** provided in the Step 2 and save your document. Then, enter the total amount of the employee contributions in the box in Step 3. Click **Choose a file**, select your file from its saved location, and click **Upload**. The review page will allow you to verify the information uploaded is accurate. You may select **Previous** to make edits or **Submit** to receive your confirmation number and funding reference number. **See page 63 in your Employer Handbook for more details on Uploading an Excel Payroll Contribution Template.**

The Illinois Secure Choice Savings Program ("IL Secure Choice") is overseen by the Illinois Secure Choice Savings Board ("Board"). Ascensus College Savings Recordkeeping Services, LLC ("ACSR") is the program administrator. ACSR and its affiliates are responsible for day-to-day program operations. Participants saving through IL Secure Choice beneficially own and have control over their Roth IRAs, as provided in the program offering set out at saver.ilsecurechoice.com.

IL Secure Choice's Portfolios offer investment options selected by the Board. For more information on IL Secure Choice's Portfolios go to saver.ilsecurechoice.com. Account balances in IL Secure Choice will vary with market conditions and are not guaranteed or insured by the Board, the State of Illinois, the Federal Deposit Insurance Corporation (FDIC) or any other organization.

IL Secure Choice is a completely voluntary retirement program. Saving through a Roth IRA will not be appropriate for all individuals. Employer facilitation of IL Secure Choice should not be considered an endorsement or recommendation by your employer of IL Secure Choice, Roth IRAs, or these investments. Roth IRAs are not exclusive to IL Secure Choice and can be obtained outside of the program and contributed to outside of payroll deduction. Contributing to an IL Secure Choice Roth IRA through payroll deduction offers some tax benefits and consequences. You should consult your tax or financial advisor if you have questions related to taxes or investments.



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