

10.12. Excluding a Class of Employees

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If the plan document provides for excluding a particular class of employee you can follow the steps below to code your census:

1. From the Compliance Menu click “Plan Specifications”. Expand the Eligibility section and under “Exclusions - Other” select “Yes” for “Exclude other Employees from definition of Eligible Employee (any exclusion must satisfy Code section 401(a)).
 2. Enter the code you plan to use to identify those who are excluded, e.g. if you want to exclude interns from all participation in the plan, enter “Intern” for each contribution type. If you want to exclude temporary workers from employer contributions but allow them to defer, enter “Temp” for each employer contribution type but leave deferrals blank.
 3. Add the following column to your primary census grid: R:EmployeeClassOther; alternatively you can add a supplemental grid under “Other Imports/Exports/Reports” with the following columns:
 - M:LastName
 - M:FirstName
 - M:SSN
 - R:EmployeeClass
 - R:EmployeeClassOther
 4. Select “Other” in the Employee Class column on your main census for these excluded individuals.
 5. Enter the name of the excluded class that the person is in the Employee Class Other column; e.g. “Intern” or “Temp” in the examples above.
 6. Select “Other” in the Employee Class column on your main census for these excluded individuals.
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