



PAYROLL INTEGRATION REQUEST FORM

We have received your request to establish an integration between Ameritas and your payroll company. Please contact your payroll company contact to review their integration capabilities and if any additional service charges will apply. To initiate the integration project with Ameritas, please complete this form with your payroll company and return this form to your Ameritas contact.

Company Information

Company Name: _____

Company ClientID(s) at Payroll Company: _____

Payroll Company: _____ Service Level: _____

Payroll Provider Software: _____

Integration Contact: _____ Integration Contact Email: _____

Target Integration Start Date*: _____

Integration Services Requested

Please confirm with your payroll company their ability to support each type of integration and any applicable charges.

____ 180 Payroll Files SFTP from Payroll Company to Ameritas

____ 360 Contribution Rate Change Files from Ameritas to Payroll Company

____ 360 Loan Information from Ameritas to Payroll Company (*available only if 1 loan outstanding allowed*)

*Note: While Ameritas will make every reasonable effort to meet your target start date, file complexities or scheduling limitations with Ameritas or your payroll company may delay the integration completion. Please be prepared to provide an interim file with required payroll information if the integration is delayed to ensure timely deposits to your plan.