



Manual Submission of Payroll Contributions

Visit <https://www.yourplanaccess.net/retirementplanconsultants/>

Type in your **Username** and **Password**, as provided in your welcome letter.

Select role from dropdown menu: **Sponsor**

Click the **Login** button

A One-time PIN (OTP) is required to login. If you need additional guidance with the OTP process, click the **Logging in with Multi-Factor Authentication (MFA)** link (located above this gray login box).

Click the **Enter the Data Validation Center to Submit Contributions** under **Submit Payroll Contributions** Tab.

- 1) Once in the plan's Data Validation Center, choose the **Manually enter employee information** option.
- 2) Click the **Next** button at the bottom of the screen.



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Once the next screen is displayed, follow these steps:

- 1) Select the appropriate **Pay Period** from the list.
- 2) Click the **Next** button.

1

2

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4

Select Pay Period Edit Data Totals / Funding Confirm / Import

Select division: All Print Grid Delete Selected Rows

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Demo	12-21-2015-12-27-2015	0	0
Default	Incomplete	Demo	12-28-2015-01-03-2016	0	0
▶ Default	Completed	Demo	01-04-2016-01-10-2016	1	0
▶ Default	Completed	Demo	01-11-2016-01-17-2016	11	0

Start Over BACK **Next**

Once the next screen is displayed, follow these steps:

4

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Edit Data

*****1234, Aldag, Skye Payroll period: 03/07/2016 - 03/13/2016

File(s) All Files CLEAR FILTERS

Status	Social Security Number	Name - First	Name - Last	Current Hou.	Current Wa.	Employee Pre-Tax Deferral
Valid	*****1234	Winter	Spring	0.00	0.00	100.00
Valid	*****4321	Jane	Smith	0.00	0.00	0.00
Valid	*****1111	John	Doe	0.00	0.00	0.00
Valid	*****6658	Jane	Doe	0.00	0.00	0.00

START OVER BACK **Next**

- 1) Select the **Add All** icon  to add all employees to your list for entry. You can sort by SSN, First Name or Last Name by clicking on the title bar.
- 2) Enter the contributions amounts under the appropriate source (Deferral, Roth, Employer, etc.).
- 3) Click the **Save** icon  and the columns will total.
- 4) Click the **Payroll Totals** icon  and an additional screen will populate to double check totals.
- 5) When finished, click the **Next** button.

Once the next screen is displayed, follow these steps:

- 1) Review the amounts entered.
- 2) Choose the appropriate **Method of Funding** off the dropdown list.
- 3) Click the **Complete** button at the bottom of the screen to submit for processing.

1

2

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Data Validation Center

Overall Progress: 67% Complete

Totals / Funding

Payroll Totals

☒ Submit for final processing PRINT GRID

Division	Participants	New Participants	Total Payroll Deposit	Employer Match	Employee Roth Deferral
Default	2	0	1110	0	0
Totals	2	0	1110	0	0

☐ Process another file

Funding/Deposit Information

Method of Funding: ACH Pull Select a funding method ACH Pull Check

From bank account: ABC Bank Name: ABC US Bank

START OVER BACK **COMPLETE**



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Click the **checkbox** to certify and click **Continue**.

Totals Verification

☒ I certify that I have reviewed the totals presented and that the results of the import are correct and approved for final import.

CANCEL

CONTINUE

Home

Data Validation Center

Play

Play All

Print

Overall Progress: **100% Complete**

Confirm / Import

✔ Your request has been submitted for processing. Your request ID is 560331, Date/Time is Feb 15, 2016 at 11:43:24 am

Funding Summary

Plan:

RPC Demo Company 401(k)

Division:

All

Payroll period:

Weekly 02/29/2016 - 03/06/2016

Method of funding:

ACH Pull

Bank account:

Account on File

Additional information:

Payroll Summary

Employee Pre-Tax Deferral

\$100.00

Employer Match

\$0.00

Employee Roth Deferral

\$0.00

Employer

\$0.00

Loan Payment

\$0.00

Total Payroll Deposit

\$100.00

Funding Instructions

You have requested to have funds pulled from your designated bank account.

Bank name:

Account on File

Bank alias:

Account on File

Account owner:

Account on File

Account #:

Account on File

Routing #:

000000000

START OVER

EXIT

If you wish to print your confirmation page, click the **Print** icon.

Click the **Exit** button at the bottom of the screen to return to the **Sponsor Dashboard**.