



Upload Spreadsheet to Submit 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 the **Submit Payroll Contributions** tab.

- 1) Once in the plan's Data Validation Center, choose the **Upload a file containing the payroll data** option.

- 2) Then click the **Next** button at the bottom of the screen.



Upload Spreadsheet to Submit Contributions

Home

Data Validation Center

Overall Progress: 0% Complete

Select Pay Period

Select division: All

PRINT GRID DELETE

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	Incomplete	Demo	01-19-2016-01-24-2016	0	0
Default	Incomplete	Demo	01-25-2016-01-31-2016	0	0
Default	Incomplete	Demo	02-01-2016-02-07-2016	0	0
Default	Incomplete	Demo	02-08-2016-02-14-2016	0	0
Default	Incomplete	Demo	02-22-2016-02-28-2016	11	0
Default	Incomplete	Demo	03-07-2016-03-13-2016	11	0

START OVER BACK NEXT

Retirement Plan Consultants LLC (877-800-1114) admin@retirementplanconsultants.net | [Problems viewing the site?](#)

Once the next screen is displayed, follow these steps.

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

Once the next screen is displayed, follow these steps.

- 1) Select the appropriate **Process format** from the dropdown list.
- 2) Click the **Select File** button.

Home

Data Validation Center

Overall Progress: 25% Complete

FILE UPLOAD

Process format: Payroll - RPC Demo DATA FORMAT

Select File

SELECT FILE

☐ Skip first record (Header Record)

☐ Skip last record (Trailer Record)

☐ Preview file

Special Instructions

Please Note: This field may not be used to specify a future funding date. Contributions will be drafted from the bank account on the day they are submitted.

START OVER BACK NEXT

Open

Look In: Relius Payroll

Processed Payrolls

- 01-22-2012 Get Luckie.xls
- 01-26-2012 Birman Spreadsheet.xls
- 01-26-2012 Bryan Drug (BCP).xls
- 01-26-2012 Bryan Drug.xls
- 01-26-2012 Rapport Spreadsheet.xls

File Name:

Files of Type: All Files

Open Cancel

- 1) Once the **Open** box is displayed, select the payroll spreadsheet you want to upload.
- 2) Click the **Open** button to return to the prior screen.



Upload Spreadsheet to Submit Contributions

Back on the prior screen:

- 1) If your file contains a header or trailer, you must check these boxes. Call RPC for assistance, if needed.
- 2) Enter notes in the **Special Instructions** box for any special instructions for the processors.
- 3) Then click the **Next** button at the bottom of the screen.

Home

Data Validation Center

Overall Progress: 25% Complete

FILE UPLOAD

Process format
Payroll - RPC Demo DATA FORMAT

Select File
SELECT FILE

☐ Skip first record (Header Record)

☐ Skip last record (Trailer Record)

☐ Preview file

Special instructions
Please Note: This field may not be used to specify a future funding date. Contributions will be drafted from the bank account on the day they are submitted.

START OVER BACK NEXT

Home

Data Validation Center

Overall Progress: 25% Complete

FILE UPLOAD

Process Format
Wright DVC Payroll

Select File
Wright 0115.csv

☐ Skip first record (Header Record)

☐ Skip last record (Trailer Record)

☒ Preview file

Special instructions

START OVER BACK NEXT

File Upload

File name: Wright 0115.csv

File is ready to be imported. Waiting on server. Please wait...

Current Salary	Current Bonus	Current Commission
2395	340	170
2087	205	220
2998	225	150

CANCEL OK

This file will be uploaded and validated; this may take a couple minutes depending on the size of the file and the speed of your internet. The screen will display the upload progress.

The **Payroll Totals** will populate.

NOTE: If you would like to double check the number by participant click the **Back** button before proceeding and you will see the breakdown by participant.

- 1) Choose the appropriate **Method of Funding** off the dropdown list.
- 2) Click the **Complete** button to submit processing.

Totals / Funding

Payroll Totals

☒ Submit for final processing PRINT GRID

Division	Participants	New Participants	Total Payroll Deposit	Employer Match	Employee Roth Deferral
Default	5	0	100	0	100
Totals	5	0	100	0	100

☐ Process another file

Funding/Deposit Information

Method of Funding
Select a funding method 1

Enter today's date
05/19/2020

START OVER BACK COMPLETE 2



Upload Spreadsheet to Submit Contributions

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

A **request ID** will display.

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