



Retrieving an Incomplete Payroll Period

These are the instructions to retrieve a payroll period you were currently working on. You can finish editing the payroll period or you can delete the incomplete payroll period and start over as needed.

Visit <https://retirementplanconsultants.info> and click **Account Access**.

Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

Select role from dropdown menu: **Sponsor**

Click the **Login** button

A One-Time PIN (OTP) is required to login using multi-factor authentication (MFA). If you need additional guidance with the OTP process, click the **Guide to Logging in with MFA** link (located at the top of 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 **In Progress and/or Completed Files** option.
- 2) Then click the **Next** button at the bottom of the screen.



Retrieving an Incomplete Payroll Period

Select the “Incomplete” payroll period you were previously working on.

- 1) Make sure the correct payroll period is highlighted.
- 2) If you want to proceed with editing and completing the selected payroll period, click the **Next** button and skip to the next step at the bottom of this page.

OR

- 3) If you would like to start over rather than editing and your payroll period is in the 4th option as “Incomplete” click the **Delete** button.
- 4) When the popup box is displayed, check the **Delete** checkbox next to the records to delete and click the **Continue** button to complete the records deletion.
- 5) Click the **Start Over** button and you will be returned back to the Data Validation Center screen where you can start from the beginning to reenter contributions. Skip the remaining steps below and proceed with that process.

Data Validation Center

Overall Progress: **0% Complete**

Select Pay Period

Select division: All

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Biweekly	04-20-2020-05-03-2020	69	0
Default	Incomplete	Biweekly	05-04-2020-05-17-2020	5	0
Default	Incomplete	Biweekly	05-18-2020-05-31-2020	67	1
Default	Incomplete	Biweekly	06-15-2020-06-28-2020	73	0
Default	Incomplete	Biweekly	07-27-2020-08-09-2020	2	0
Default	Completed	Biweekly	03-23-2020-04-05-2020	1	1
Default	Completed	Biweekly	08-24-2020-09-06-2020	1	0

Buttons: PRINT GRID, DELETE (3), START OVER (5), BACK, NEXT (2)

Delete Files

Delete	File Name
<input checked="" type="checkbox"/>	All records for the payroll period

Buttons: CONTINUE (4), CANCEL

File(s)

All Files CLEAR FILTERS

New	Status	Social Security Number	Name - First	Name - Last	Current Hours	Current Wa...	Employee Pre-Tax Defer
No	Pending	****1234	Skye	Aldag	0.00	0.00	100.00
No	Pending	****4321	Alex	Baumert	0.00	0.00	0.00
No	Pending	****1111	John	Doe	0.00	0.00	0.00
No	Pending	****6658	Jane	Doe	0.00	0.00	0.00

Page 1 of 1 20 items per page

Buttons: START OVER, BACK, NEXT

To proceed with editing and completing the selected payroll period by entering the participants that may not have gotten added the first time and add the correct amounts as needed.

Click the **Next** button.



Retrieving an Incomplete Payroll Period

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

2 **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 3

- 1) Verify your totals are correct.
- 2) Select the **Method of Funding** – ACH Pull or Check.
- 3) Click the **Complete** button.

You will then see a printable confirmation screen.

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 **Sponsor Dashboard**.

Home

Data Validation Center

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