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.

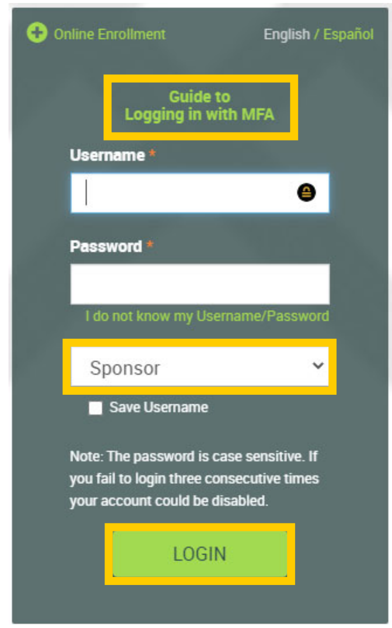
Visit https://retirementplanconsultants.info and click **Account Access**.

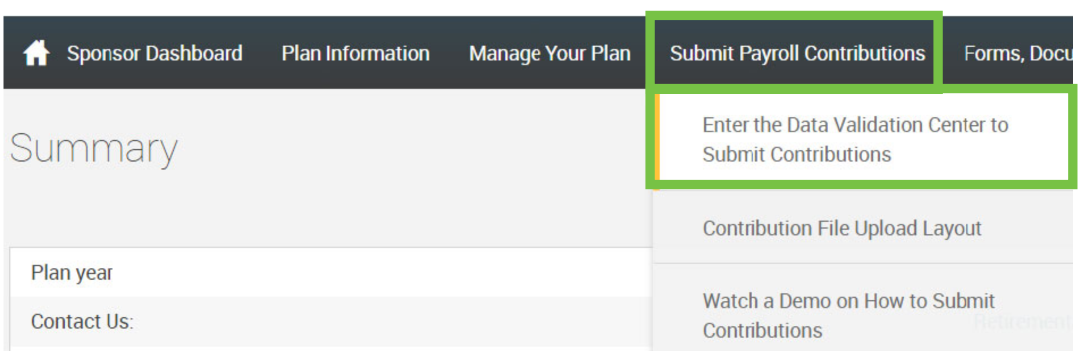
Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

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).

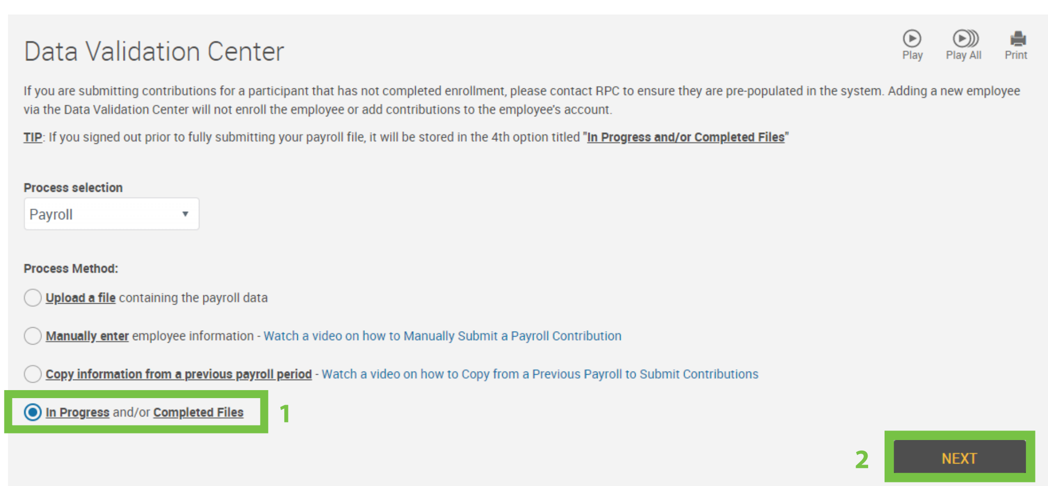




Click the **Enter the Data Validation Center to Submit Contributions** under the **Submit Payroll Contributions** tab.

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

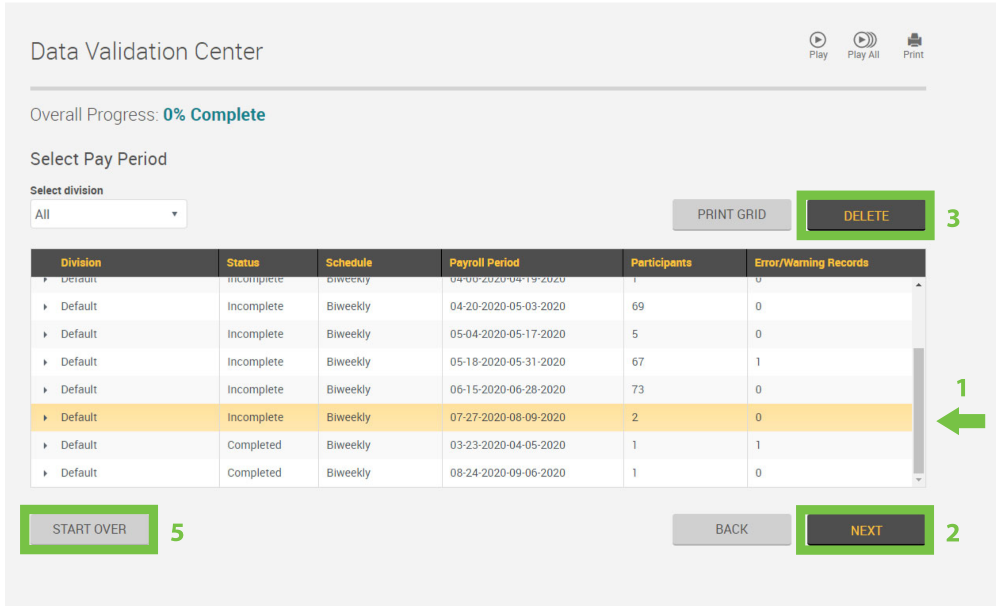
Select the "Incomplete" payroll period you were previously working on.

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.

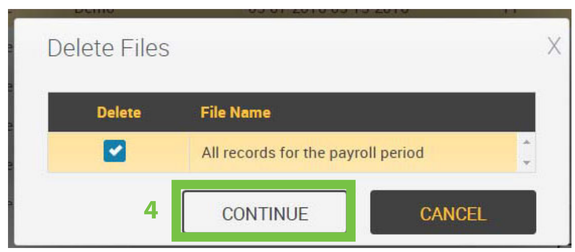
OR

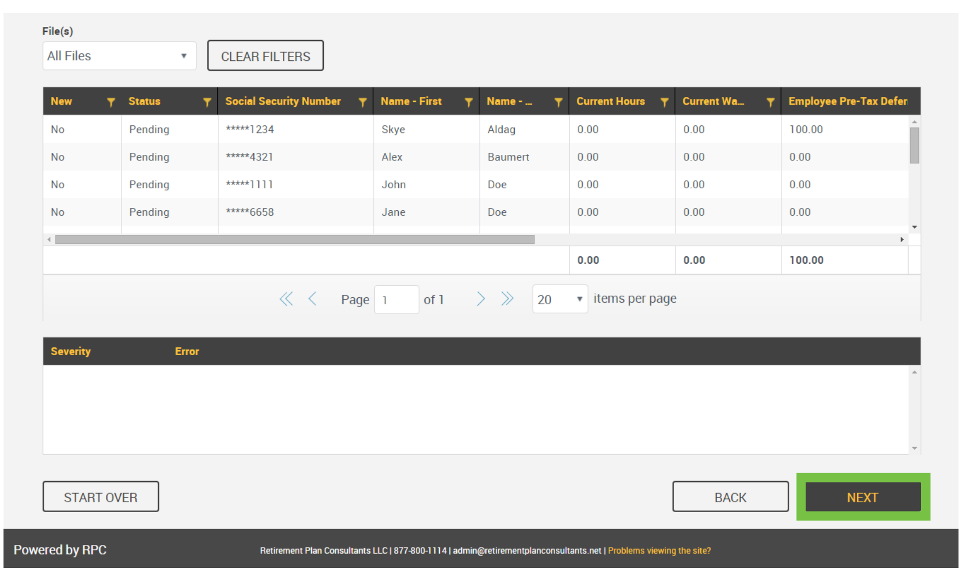
3) If you would like to start over rather than editing and your payroll period is in the 4th option as "Incomplete" click the **Delete** button.



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.

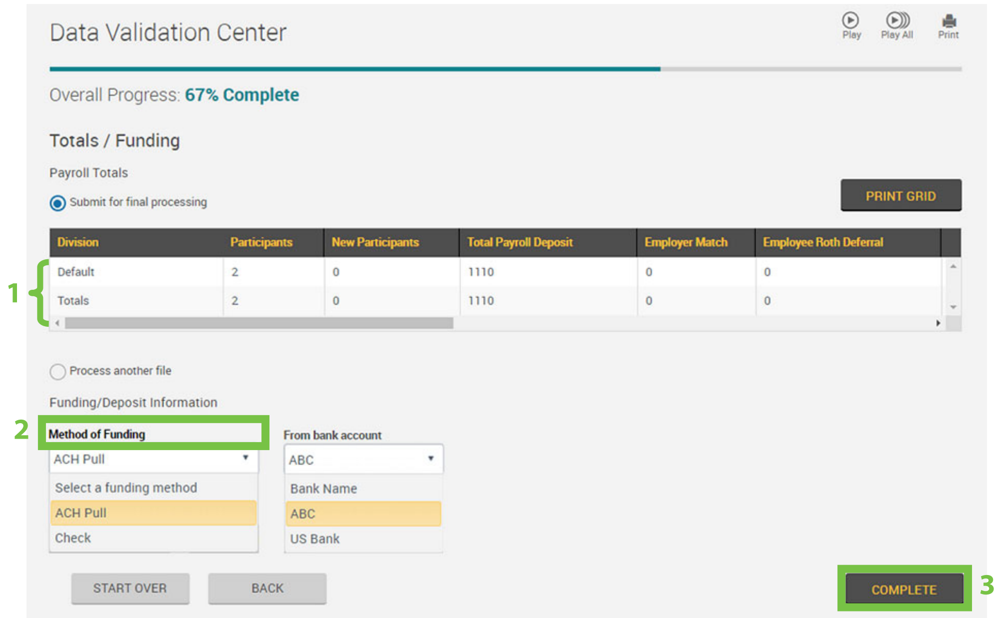




To proceed with editing and completing the selected payroll period by entering the participants that may not have gotten added the first time and add the correct amounts as needed.

Click the **Next** button.

Retrieving an Incomplete Payroll Period



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**.