



# Upload Spreadsheet to Submit Contributions

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 **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 (877-600-1114) 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: Payroll Files

01-03-2022 Weekly.xls

01-03-2022 Semi-Monthly.xls

01-03-2022 Location A.xls

01-03-2022 Location B.xls

01-03-2022 Exempt Payroll.xls

01-03-2022 Non-Exempt Payroll.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  
Payroll - RPC Demo DATA FORMAT

Select File

Demo Payroll File.xlsx

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

File Upload

File name: Demo Payroll File.xlsx

Initial file format validation complete. Preview file and confirm you wish to continue to import the file.

Social Security Number	Name - First	Name - Last	Date of Birth
89	Payroll	Test	199001

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 the **Continue** button.

### 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.

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
<b>Total Payroll Deposit</b>	<b>\$100.00</b>

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

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**.