



Copying Previous Payroll to Submit Contributions

Visit <https://retirementplanconsultants.info/login/>

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** option under the **Submit Payroll Contributions** tab.

1) Once in the plan's Data Validation Center, choose the **Copy information from a previous payroll period** option.

2) Then 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) Select the appropriate **Pay Schedule** off the dropdown list to copy.
- 3) Select the appropriate **Pay Period** off the dropdown list to copy.
- 4) Click the **Next** button at the bottom of the screen.

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Demo	03-14-2016-03-20-2016	0	0
Default	Not started	Demo	03-21-2016-03-27-2016	0	0
Default	Not started	Demo	03-28-2016-04-03-2016	0	0
Default	Not started	Demo	04-04-2016-04-10-2016	0	0
Default	Not started	Demo	04-11-2016-04-17-2016	0	0
Default	Not started	Demo	04-18-2016-04-24-2016	0	0
Default	Not started	Demo	04-25-2016-05-01-2016	0	0

Select Previous Pay Period To Copy

Select pay schedule: Demo

Select pay period: 02-29-2016-03-06-...

Start Over BACK Next

Edit Data

Save Undo Payroll Totals Delete Refresh Add All Add New Add Existing Validate Records Print Errors Print Grid Download

****1234, Aldag, Skye Payroll period: 04/04/2016 - 04/10/2016


File(s) All Files CLEAR FILTERS


New	Status	Social Security Number	Name - First	Name - L.	Current Hours	Current Wag.	Employee Pre-Tax Defer
No	Pending	****1234	Winter	Spring	0.00	0.00	100.00
No	Pending	****4321	Jane	Smith	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

START OVER BACK NEXT

Once the next screen is displayed, follow these steps

- 1) Review the contributions amounts under the appropriate source (Deferral, Roth, Employer, etc.).

- 2) Click the **Save** icon  and the columns will total.

- 3) Click the **Totals** icon  and an additional screen will populate to double check totals.

- 4) When finished, click the **Next** button at the bottom of the screen.

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.

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

From bank account: ABC

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.

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

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**.