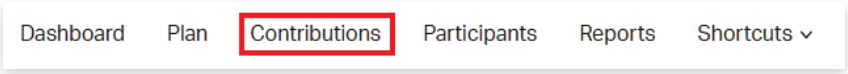
Contribution submission instructions

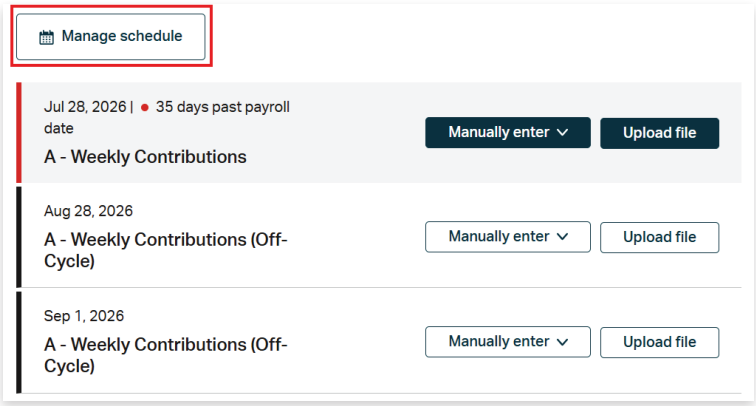
Via manual entry

You can submit contributions manually or by uploading a file, all from your plan website. This guide is a walkthrough for submitting manually.

1. Log in to your plan website.
2. Select **Contributions** on your dashboard.

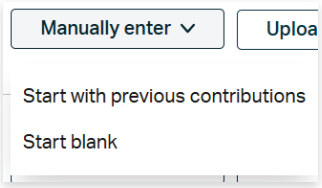


3. From the **Contributions** page, select the contribution date and site you're submitting for.
   a. If the date you're looking for doesn't appear, follow the steps to add an off-cycle date by selecting **Manage Schedule**.

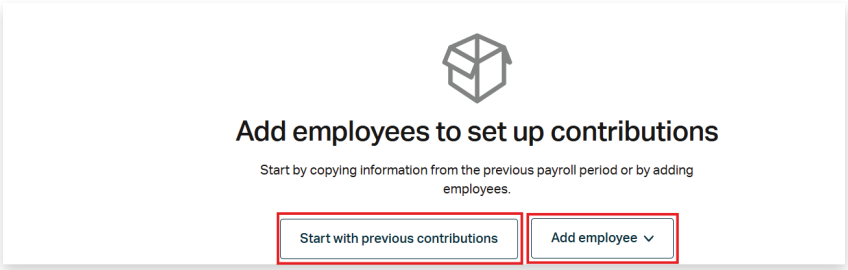


4. Select **Manually** enter and choose **Start with previous contributions** or **Start blank** from the dropdown menu.

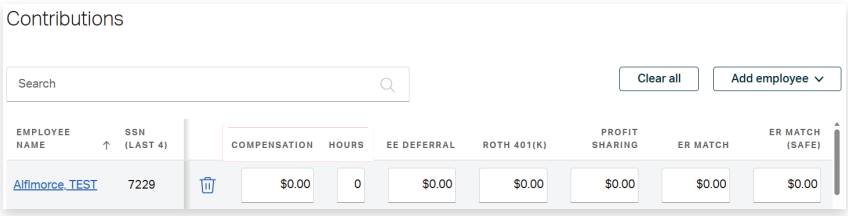
   Note: If you'd previously started an entry but did not submit it, you will see a **Resume** option instead of **Manually enter**. Select **Resume** to continue or **Reset** to cancel and start over.
   a. **Start with previous contributions** helps to expedite the process by using data from your most recent payroll. **Skip to step 6**.
   b. **Start blank** begins a new contribution submission and you must manually add employees and contribution amounts. **Continue to step 5**.



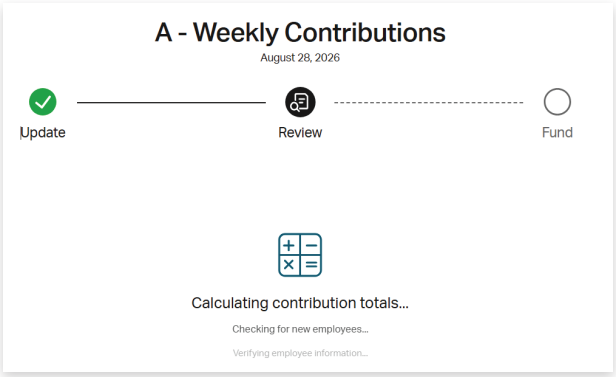
5. If you selected **Start blank**, begin by selecting the **Add employee** dropdown menu and choose **Search for existing employee** to load existing data from the most recent payroll or **Add a new employee** to manually enter applicable information.



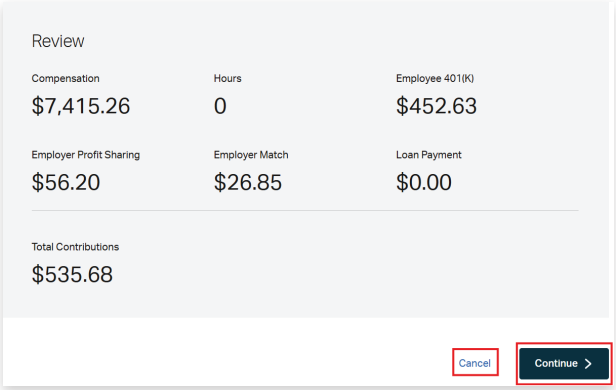
6. If you selected **Start with previous contributions**, confirm that all loaded data is correct. For manually added employees, complete the employee field, including compensation, hours, and contribution amounts.



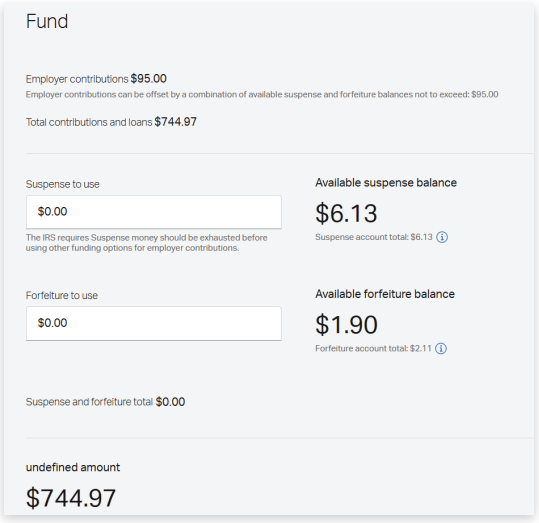
7. Select **Save and continue**. The system will perform an initial, real-time review of the submission to help identify and correct any data alerts that could possibly delay processing.



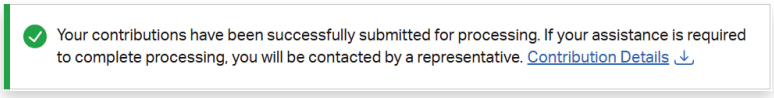
8. From the **Review** page, verify that the information matches the intended totals for each contribution source from the payroll. If everything is correct, select **Continue**. Select **Cancel** to update the contributions if there are any inaccuracies.



9. Confirm or edit the information on the **Fund** page.
    a. If applicable, you may see options to use **Suspense to use** and/or **Forfeiture to use** toward your employer contributions.
        — **Suspense to use** will pre-fill the maximum amount available. You can edit this, but can't exceed the available balance shown.
        — **Forfeiture to use** will always pop up as zero, but you can enter any amount up to the available balance.
    b. If you need to update the bank account information:
        i. Select **Cancel**.
        ii. Return to the **Contributions** page.
        iii. Select **Update bank account**.



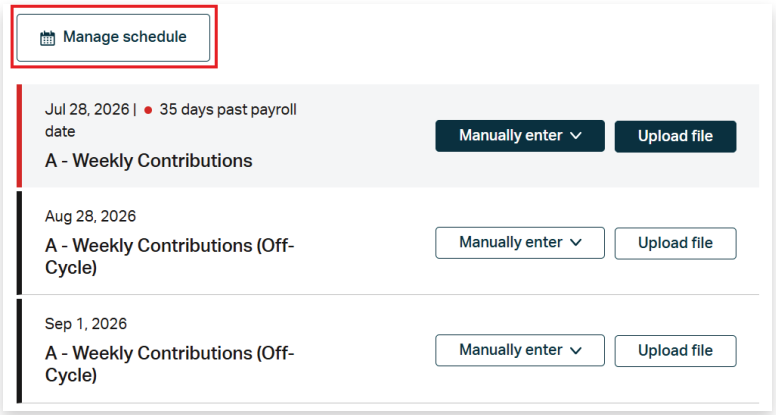
10. Select **Submit**. Your contributions have been successfully submitted.
11. On the following page, you can review your submission. You will also receive a confirmation email.



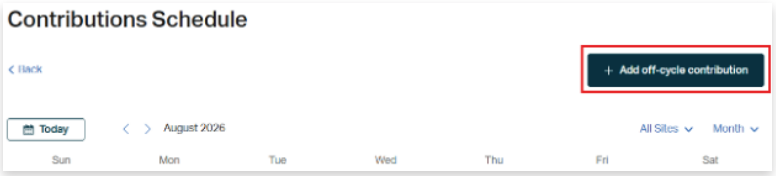
12. Plan contacts who have notifications enabled will receive an automated funding request (AFR) email. This email will include the contribution date, site, source totals, method of funding (ACH, check, or wire), and funding instructions, if necessary.
    a. If the full suspense amount is being used to fund contributions, a "Contribution Submission Received" email will be sent. It addresses the tentative amount of suspense. Once the exact amount of suspense available is confirmed, the contribution will be processed and an AFR will be sent with the exact suspense amount used and additional funding information.
13. To view the tracking status of the contribution submission, scroll to the bottom of the **Contributions** page and select **View Details**. The status of all contributions for the last 30 days will appear here.

Add an off-cycle date

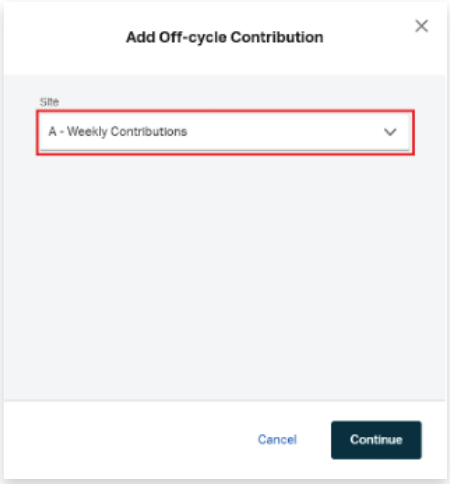
1. Select **Manage schedule**.



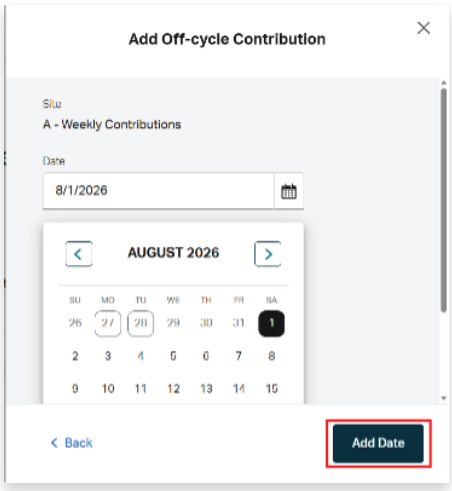
2. Select **Add off-cycle contribution**.



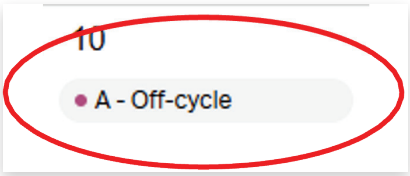
3. Select the site from the dropdown menu, then select **Continue**.



4. Choose and select **Add Date**.



5. Once a date has been chosen, you will see the date on the calendar as **Off-cycle**.



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