



Copying Previous Payroll to Submit Contributions

Payroll & Employee Info Documents

Setup Payroll Integration

Submit Payroll Contributions

Add or Update Employee Info

Lookup Employee

Choose **Payroll & Employee Info** and select **Submit Payroll Contributions** from the dropdown.

Select **Payroll** from the **Process selection** dropdown.

Choose **Copy information from a previous pay period** for your **Method of Submission**.

Click **NEXT**.

Data Validation Center
SELECT THE PROCESS YOU WANT TO USE.

Payroll: Use this process to submit Payroll Data.

Add/Update Employees: Use this process to add

****Click the tab on the right for HELP!****

Check the [Plan Sponsor Resource Center](#) for helpful

Process selection
Payroll

Method of Submission

☐ Upload a file containing the payroll data - [Click Here](#)

☐ Manually Enter payroll data - [How to Manually Enter](#)

☒ Copy information from a previous payroll period

1)

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Monthly	06-01-2025-06-30-2025	0	0
Default	Not started	Monthly	07-01-2025-07-31-2025	0	0
Default	Not started	Monthly	08-01-2025-08-31-2025	0	0
Default	Not started	Monthly	09-01-2025-09-30-2025	0	0
Default	Not started	Monthly	10-01-2025-10-31-2025	0	0

Select Previous Pay Period To Copy

2) Select prev schedule
Monthly

3) Select pay period
05-01-2025-05-31-...

4) START OVER BACK NEXT

1) Select the **Pay Period** from the list you will be submitting.

2) Choose 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.



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Review and update the contribution amounts.

Select **Save**.

Select **Payroll Totals** to confirm amounts.

Click **NEXT**.

Payroll period: 06/01/2025 - 06/30/2025

Social Security Num...	Name - First	Name - ...	Date of Birth	Date of Hire - Original	Employee Pre-Tax Deferral
*****8888	test	Name	01/01/1964	01/01/2020	35.00
*****3645	test	test	01/01/2000	01/01/2020	0.00
*****5555	test	test1	01/01/2000	01/01/2020	10.00

Data Validation Center

Overall Progress: **67% Complete**

Totals / Funding

Payroll Totals

☒ Submit for final processing

Division	Participants	New Participants	Total Payroll Deposit	Employee Pre-Tax Deferral	Employee Roth Defe
Default	3	0	192.5	45	85
Totals	3	0	192.5	45	85

☐ Process another file

Funding/Deposit Information

Method of Funding

Select a funding method

Funding date

09/02/2025

Make your selection from the **Method of Funding** dropdown.

Click **COMPLETE**.

Check the box for verification and select **CONTINUE**.

Verification

☒ I verify the information is accurate and I am authorized by the Employer to approve the final submission of this import.

Submissions after 11:00 am CST will be processed the following business day.

Click **CONTINUE** to Submit

CANCEL CONTINUE



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Data Validation Center



Overall Progress: **100% Complete**

Upload Details

 Your request has been submitted for processing. Your request ID is **3825546**, Date/Time is Sep 02, 2025 at 04:30:09 pm

Funding Summary

Plan:

0 RPC Demo Retirement Plan

Division:

All

Payroll period:

Monthly 06/01/2025 - 06/30/2025

Method of funding:

ACH Pull

Account on File

Additional information:

Payroll Summary

Employee Pre-Tax Deferral

\$45.00

Employee Roth Deferral

\$85.00

Safe Harbor Non Elective

\$62.50

Total Payroll Deposit

\$192.50

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 on File

000000000

START OVER

EXIT

A payroll confirmation email will be sent to Primary Plan Contact.

If you would like to print your confirmation page, select the **Print** icon.

Click **EXIT** to return to the **Plan Dashboard**.