

Ameriprise Online Payroll Remittance

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Getting set up and accessing the website

- **Is there an extra charge to use this website to remit contributions to Ameriprise?**
 - There is no additional charge to remit contributions on our website.
- **How long does it take to set my organization up for Online Payroll Remittance? How long for bank account changes?**
 - It takes 7-10 days for us to complete the setup process for a bank ACH Pull so that you can then submit contributions on our website. This same time frame also applies to bank account changes. We pull a \$.01 test transaction from the bank account on the Online Payroll ACH agreement that was submitted for your organization and then wait seven days to push it back. Only after this complete process can we give you access to submit contributions online.
- **I forgot my password, username, or am locked out of the website. How can I regain access?**
 - If you are locked out or have forgotten your username or password, please send an email to payrollsupport@nbsbenefits.com. Include the name of the organization you have access to. We can reset your login credentials and resend them to the email address on file. Please note that a request to reset login credentials must come from the contact who owns the credentials.

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Submitting Contributions

- **How do I submit payroll contributions on this website?**
 - On the login page for our website (<https://www.nbspayroll.com/>), you'll find a document titled "OPR Manual" that has instructions and screenshots showing how to use our website to submit your payroll contributions. There is also a video titled "Using the Process Payroll Module" that shows the steps for various ways to submit payroll contributions online.

If you would like additional help, we're happy to walk you through the process over the phone. Please call us at (877) 938-7310 between 7:00 a.m. and 5:00 p.m. Mountain Time and a member of our team would be happy to assist you.
- **Is online payroll remittance automated?**
 - Online remittance transactions are not automated and cannot be scheduled ahead of time. When you are ready to remit contributions, you will need to log in and submit the transaction. Funds will be pulled from your bank and post to employee Ameriprise accounts two business days after you submit them online.
- **Why is my source column heading showing as "Post Tax and Other?"**
 - The source heading "Post Tax and Other" is a catch-all source for several different types of accounts. The plan types that fall under this source are Traditional and Roth IRA, 401(a), and Non-Qualified. Your contributions may be pre-tax, but still should be submitted under the Post-Tax and Other source if they fall under one of these plan types.

- **When will the funds I submitted online post to employee Ameriprise accounts?**
 - Contributions you submit online will post to employee Ameriprise accounts two business days after the transaction was submitted online assuming that each employee's Ameriprise account is set up and ready to receive funds.
- **What will the transaction look like on my bank statement?**
 - The transaction will display on your bank statement that it went to "Ameriprise/NBS" with an ID of D411667086.
- **I'm going to submit a payment that is over my maximum allowable transaction amount. Will the payment go through?**
 - Each transaction you submit must be under your maximum allowable transaction amount that shows on your Plan Info page. If you need that amount raised, you can send us an email at payrollsupport@nbsbenefits.com and we will raise it to the amount you specify. If you submit a payment over your maximum allowable transaction amount, the funds will not be pulled from your bank account until you email us and ask us to raise this amount.
- **My payroll submission confirmation page disappeared before I had a chance to save/print. Can that be regenerated?**
 - Unfortunately, the payroll submission confirmation pages cannot be regenerated. If you need to go back and see the total you submitted, you can go to the section titled "Uncompleted and previous submissions." There you'll see the two most recently completed transactions for your organization. You can click on one and then click "Next" to see the amounts that you submitted.

After these transactions settle (two business days after submitting them online), you can run reports on our website to show contributions by date and employee.

- **I submitted the wrong amount for an employee. How can I fix it?**
 - If we have not yet requested the funds you submitted from your bank, we may be able to delete the pending transaction and open a new payroll period for you so you can resubmit the funds. If it's after 10:00 a.m. Mountain Time the business day following the day you submitted the funds online, we will not be able to stop the transaction you submitted online from proceeding.

If we have already requested or pulled funds from your bank account, you will need to contact Ameriprise to request a correction or return. You can receive further instructions on this process by contacting your local Ameriprise advisor or by calling the Ameriprise Home Office at (800) 862-7919 and requesting an excess removal.

- **How do I make sure the funds I remit online are posted under the correct plan year?**
 - Ameriprise does not keep track of the plan year that funds were submitted under, but rather they post the funds you submit based on the date they are received. All plan year recordkeeping should be kept on your end as the employer.

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Payroll Period Questions

- **Can I change my pay period dates or frequency?**
 - If your organization's payroll schedule changes or you decide you'd like to remit contributions on a different frequency, please call or email us and provide your pay schedule frequency (annual, quarterly, monthly, bi-weekly, semi-monthly, weekly, or daily) and the start and end dates of the next pay period you would like available for you to remit online.
- **The payroll period I need seems to have disappeared. Where did it go?**
 - If you select a payroll period and start working on it but don't finish and submit it, that payroll period will move to the section called "Uncompleted and previous submissions." To get to that section, after you click "Process Payroll" on your main page, choose the 4th option. You will see there your missing payroll period marked as "Incomplete." You can select it, continue working on it, and then submit it. If after selecting it and attempting to move forward, you get an error message, please email us to have the payroll period reset.
- **My pay periods on the website don't match my organization's actual payroll periods. Can this be fixed?**
 - We can change your payroll schedule to fit the frequency that you need to submit contributions. If you need a change made, please call or email us. To make this change we will need your desired pay schedule frequency (annual, quarterly, monthly, bi-weekly, semi-monthly, weekly, or daily) and the start and end dates of the first pay period you would like available for you to remit online.
- **I accidentally used the wrong pay period to remit contributions. What should I do?**
 - The actual date of the payroll period you select when you submit contributions does not affect how those contributions are posted at Ameriprise in any way. Ameriprise does not keep track of the payroll date that funds were submitted under, but rather they post the funds you submit based on the date they are received.

We can't change a payroll period associated with a payment that you already submitted. If you unintentionally skipped a pay period, you can use the skipped one for your next remittance.
- **How do I submit an off-cycle contribution? (match, bonus, extra, profit sharing, etc.)**
 - You have a couple of options here. You can combine your off-cycle contributions with regularly scheduled contributions and submit them all together using an existing payroll period on our website. If you do this, please make sure that the amount of the payment doesn't exceed your largest anticipated transaction amount. If it does, you'll need to email us and ask us to raise this maximum transaction amount.
 - If you would prefer to remit your off-cycle or extra contributions in a separate transaction from your regularly scheduled contributions, you can email us and request that an extra payroll period be added for you to use.

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Making updates and changes to your organization's information

- **How do I change the contact information for my organization?**

- Employer address and phone number can be updated by sending an email to payrollsupport@nbsbenefits.com to provide the new information and request a change.

To change your plan contacts that display on your Plan Info page and have access to your organization on our website, you should submit our Online Payroll Change Form. You can download this form from our website login page (<https://www.nbspayroll.com/>). Fill out the applicable sections of the form and email it to us at payrollsupport@nbsbenefits.com or fax it to (801) 838-7311.

- **How do I remove former employees from my employee list?**

- We can enter a termination date for your former employee, but we can't remove them from your group completely as their contribution history is stored there.

To avoid seeing terminated employee names as you're submitting payments, you can use the option to "Copy information from a previous payroll period." After choosing that option, the site will prompt you to select a payroll period to copy from. If the payroll period that you select to copy from did not have funds for the terminated employee(s) submitted, that employee won't appear on the payroll you're working with. You can then change any amounts or add additional employees one by one to the payroll you're working with.

- **What is the bank account on file for my organization?**

- If you're not sure what bank account information we have on file, send an email to payrollsupport@nbsbenefits.com. We can provide the name of the bank and the last couple digits of the current account on file.

- **How do I change my organization's bank account information on file with NBS?**

- You will find our Online Payroll Change Form on our website login page (<https://www.nbspayroll.com/>). Please download the form, fill out the applicable sections, and return it to us at payrollsupport@nbsbenefits.com or fax it to 801-838-7311.

It takes between seven and ten days to complete the process of changing your organization's bank account information as we need to run a \$.01 test transaction on the new bank account. During this time, those with current login credentials will not be able to access your organization's page on our website to remit payroll contributions.

We will send email notifications to your organization's contacts to inform them when we will pull the test transaction and when it has completed successfully.

- **Can I have more than one bank account set up online so I can select which one to remit from?**

- Each employer remittance group, or plan, in our system can only have one bank account associated with it on our website. If you need to remit funds from more than one bank account, we will need to set up an additional employer remittance group for your

organization. Please email us if this is something you need, and we can provide further instructions for how to initiate this process.

- **How do I add a new employee?**

- Before you can submit contributions for a new employee, they will need to have an Ameriprise account set up. They can work with your local Ameriprise advisor to get an account set up. Once their account is set up and ready to receive funds, you can go ahead and submit contributions for them.

If you don't see the employee's name in your employee list yet, you can add them manually as you're processing your payroll by clicking the "Add New" button. Make sure that you accurately enter their full name and social security number in the proper fields. You can then enter an amount for them and submit their contributions normally.

If you submit funds for a new employee whose account is not yet active and ready to receive funds, these funds will be returned to your organization via check.

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Other Questions

- **A contribution for an employee was returned to me via check. Why?**

- If you submit funds for an employee whose account is inactive or who does not have an Ameriprise account, these funds will be returned to your organization. There are various reasons why an employee's account can no longer accept funds. We don't have those details here at NBS.

Your employee can work with a local Ameriprise advisor to get an account set up and ready to receive funds. Once that takes place and you have confirmed that the account is ready to receive funds, you can mail back the return check to Ameriprise and we will process it.

- **I tried to run a report on your website, but it didn't pull up.**

- If you attempt to run a report on our website and the report does not load, this is likely because you have a pop-up blocker enabled on your web browser. You should still be able to view and download the report by choosing "View Reports" from the drop-down menu and then selecting the report you ran from the list on that page.

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