Website User Guide:

Copy From Previous Pay Period

national benefit services

Contents

PSW User Guide: Copy from Previous

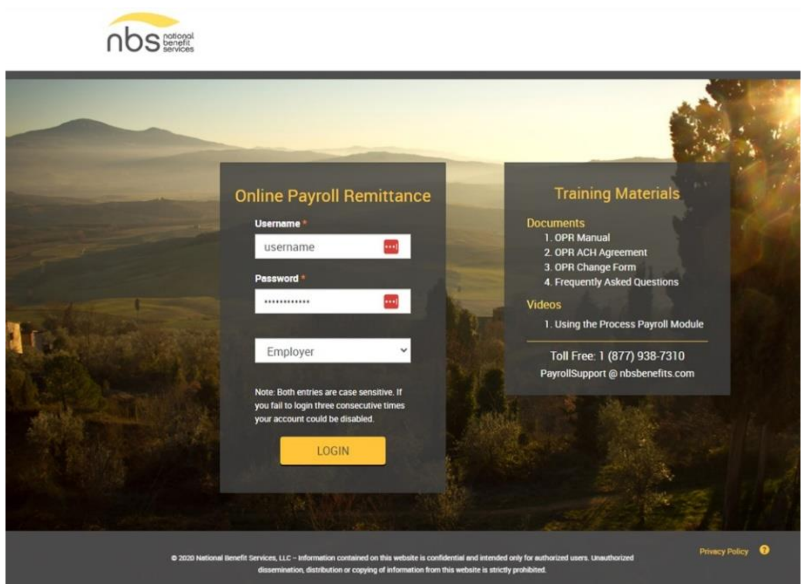
One of the Process Methods on the website is "Copy information from a previous payroll period." This method copies the participants and allocations from a selected pay period to a new pay period. This is helpful when employers make the same or similar contributions each pay period. It also saves one step over the "Manually enter contributions" option - the participant names and a dollar amount are already added to the pay period. This option is also helpful for employers who have had participants stop participating in the retirement plan whether because they decided not to participate or they are no longer employed by the employer.

Log in to the Website

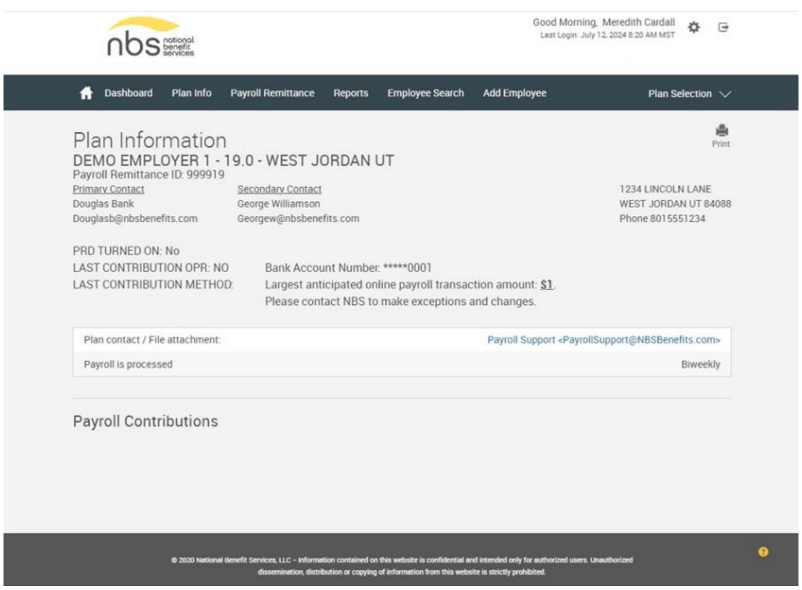
https://www.nbspayroll.com/

Enter your username and password.

Click “Login.”



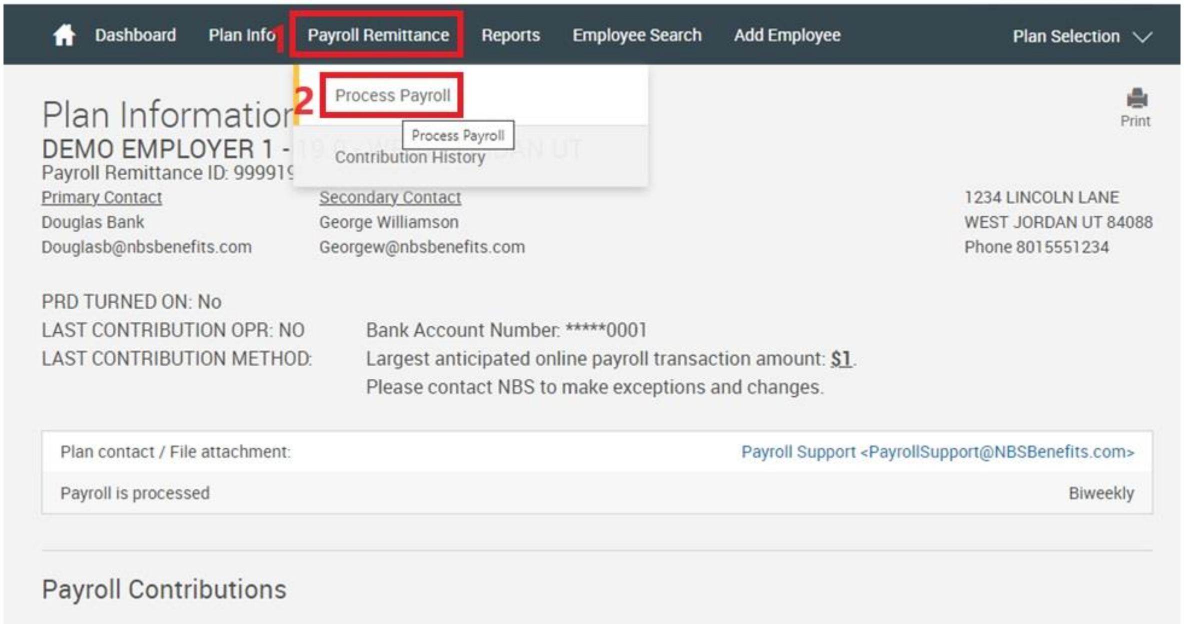
Your plan Dashboard will load.



Choose Process Method

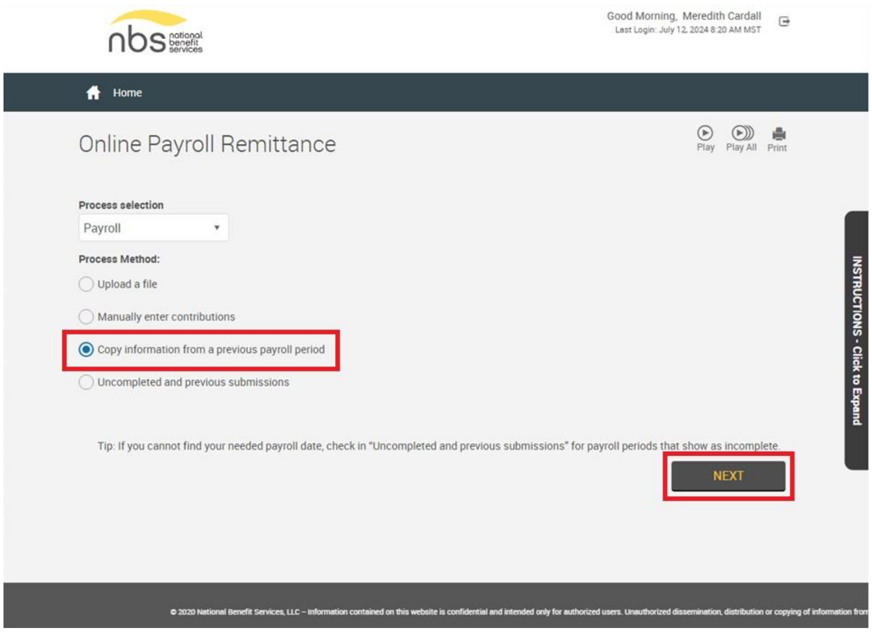
To process contributions, on the dark toolbar at the top, select "Payroll Remittance."

Then, select "Process Payroll."



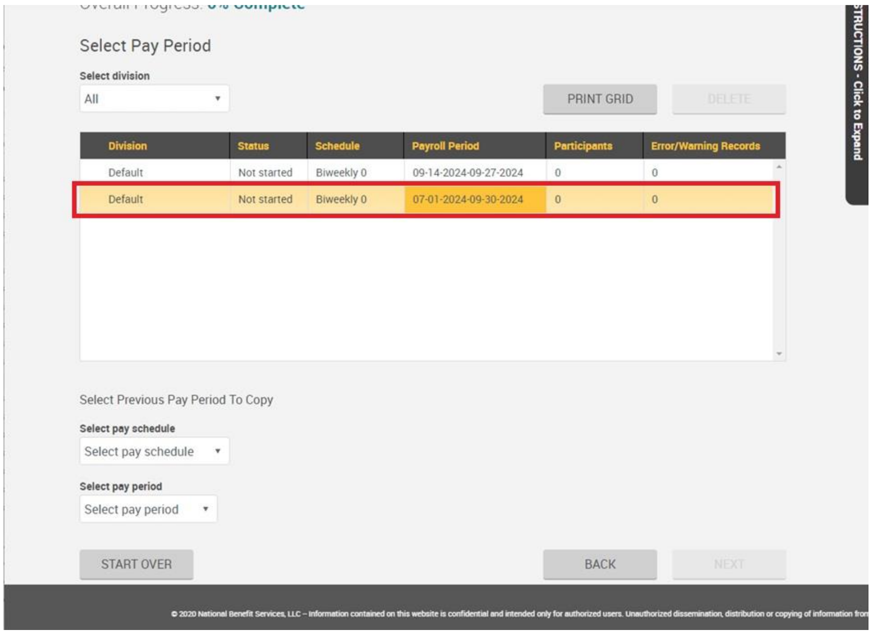
Choose "Copy information from a previous payroll period."

Then, click "Next."



Copy from Previous Options

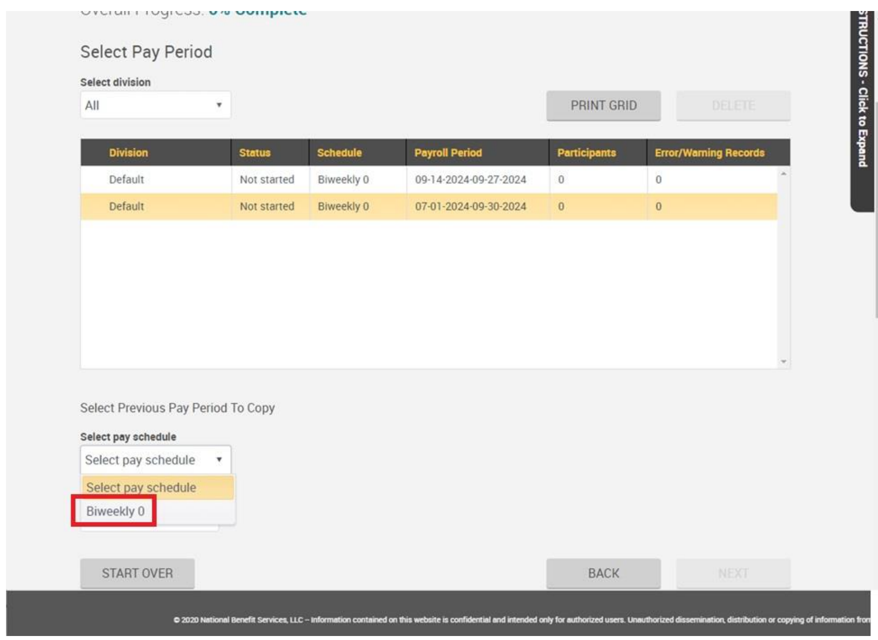
There are three selections you need to make before you can move on to the next step.

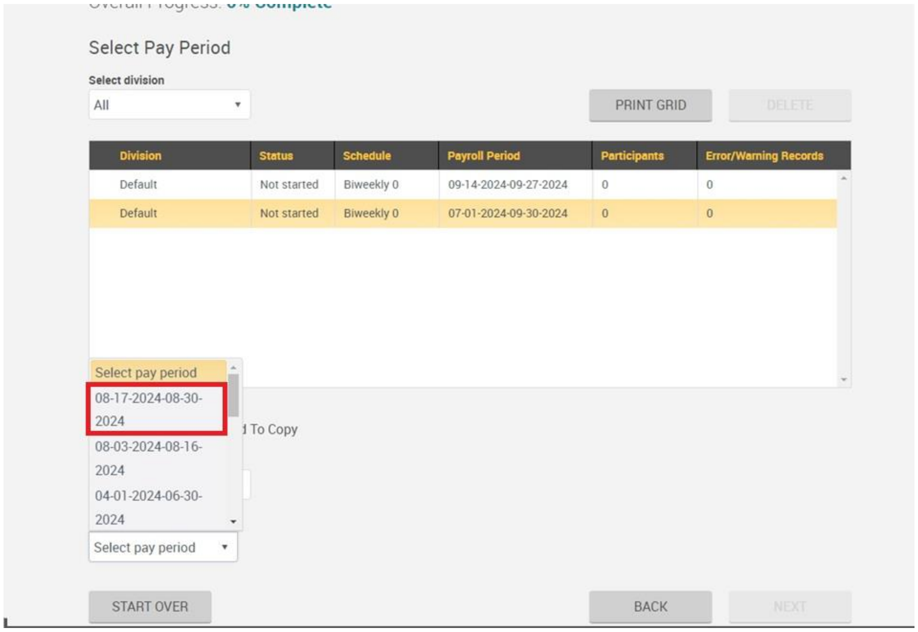


In the top grid, **select the pay period for which you want to make contributions,** by clicking on the pay period. The pay period will highlight yellow when it is selected.

In the first drop-down, "Select pay schedule," there should only be one option to choose from.

This plan is biweekly, but your plan may be Weekly, Biweekly, Semimonthly, Quarterly, or Annual.



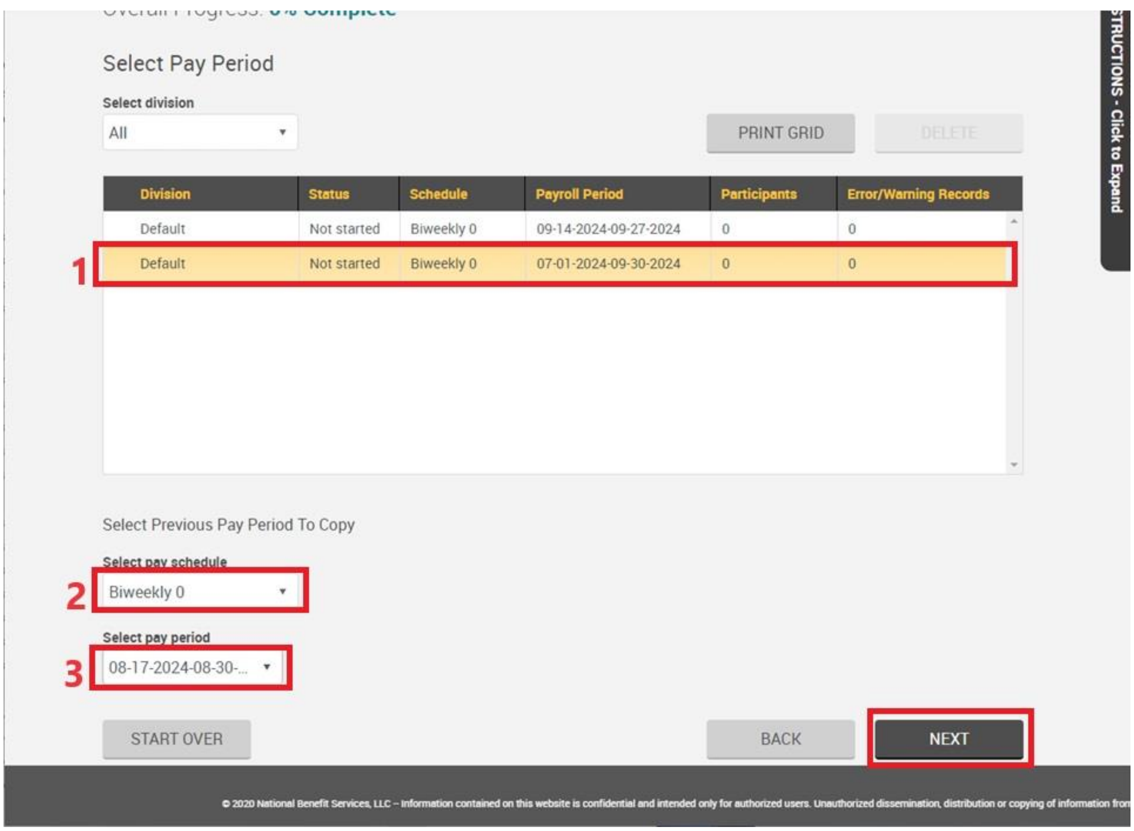


In the second drop-down, **select the pay period you want to copy**.

Typically, this will be the most recent pay period. However, if the most recent pay period was different than normal, you may wish to choose another pay period.

Once all three selections are made, the "Next" button becomes available.

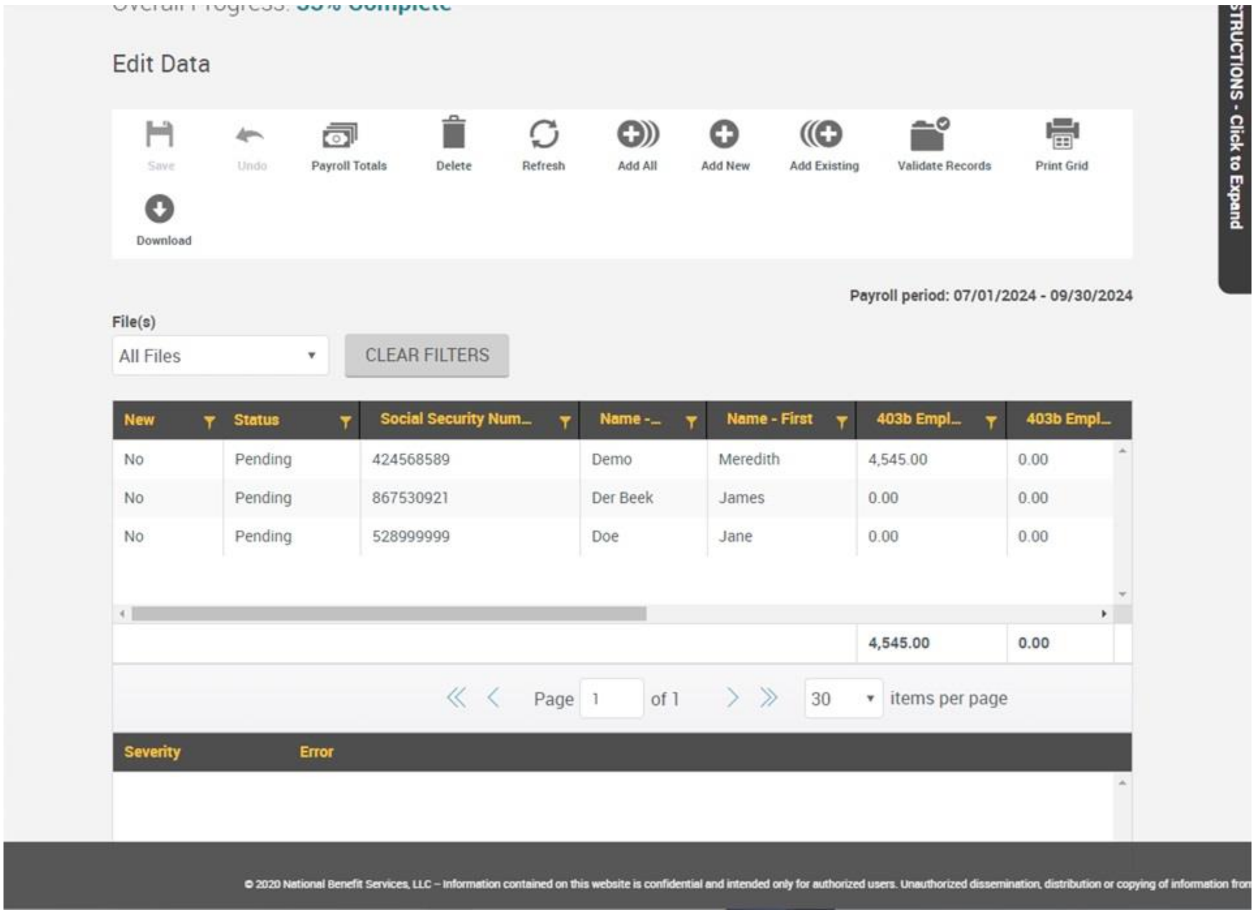
Click "Next" to move to the next page to review and edit the data.



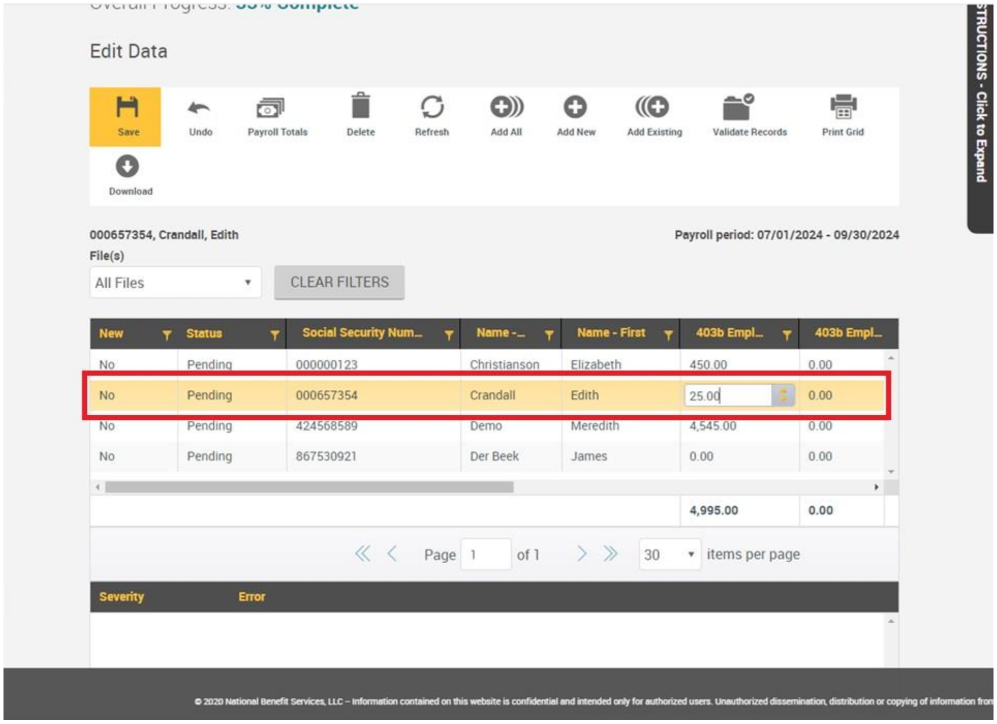
Edit Data

Do a review of the data in the grid. The far-right column(s) in the grid will reflect the funding type for your plan. This demo plan is a 403(b) plan. Most plans will only have one funding type column.

Do you need to edit dollar amounts or add or remove an employee? If yes, please continue in this section. If your data is correct, you can skip to the Data Validation section.



Edit Dollar Amounts

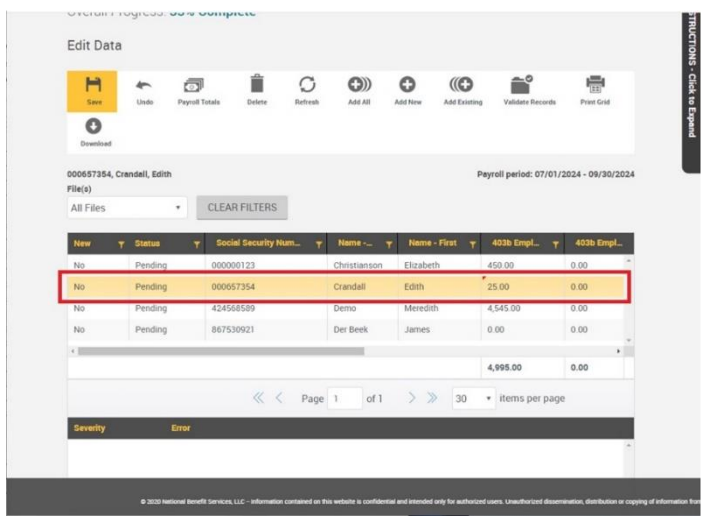


To edit a dollar amount, simply place your cursor in the funding type column next to the participant's name. Then type the new dollar amount. A red triangle will appear next to the dollar amount (as well as any other unsaved changes) until the "Save" button is pushed or the payroll is processed. To contribute funds to Edith, click into the funding type cell next to Edith's name and type in the contribution amount for this payroll period.

***If you are submitting employee-paid and employer-paid funds**, please combine the dollar amounts and type in the cumulative amount per person. With the exception of 403(b) accounts, Ameriprise does not separate employee-paid and employer-paid funds.

***If you are submitting funds for a Traditional or Roth IRA, 401(a), and/or Non-Qualified account**, your funds will be allocated under the Post Tax and Other column. The source heading "Post Tax and Other" is a catch-all source for several different types of accounts. 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.

You can make multiple changes for multiple participants, then save your changes. Scroll down to the "[Save Payroll](#)" section to learn how to save changes.



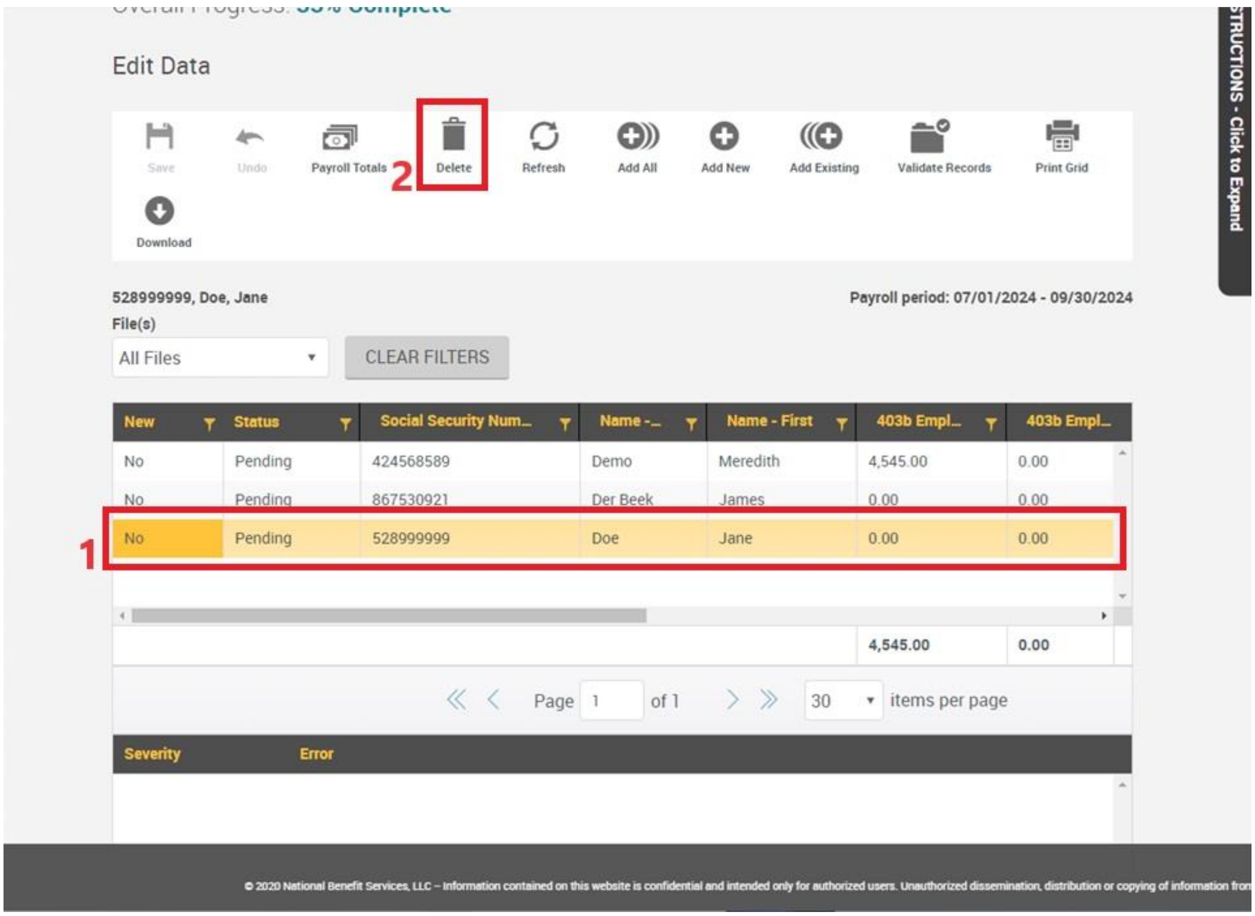
Delete an Employee

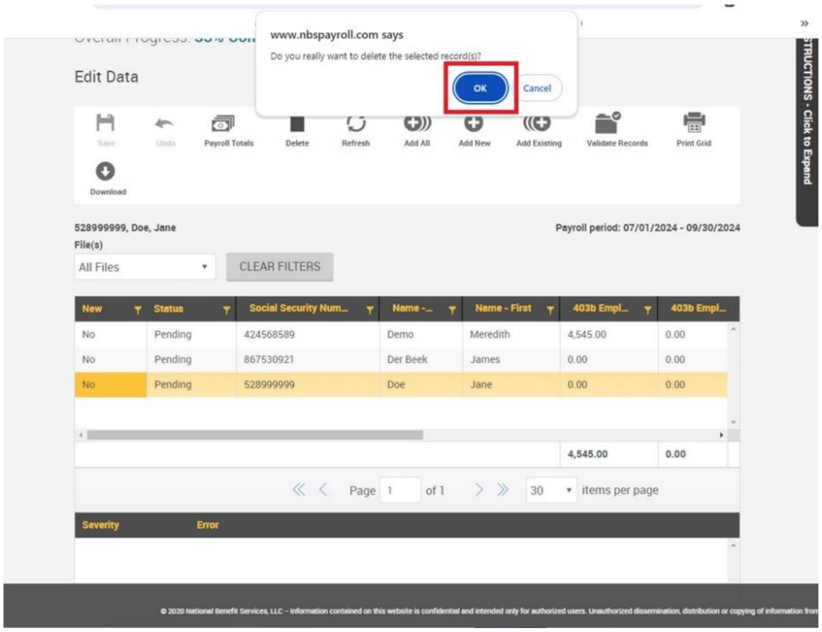
You may wish to delete an employee who is no longer participating in your retirement plan. They will stay in your Employee List at NBS forever, but you don't have to keep them in your payroll list if you're using "Copy from previous pay period."

Click on the participant who you would like to remove from your payroll period. Don't worry! If you accidentally remove someone, you can always add them back. The participant is selected when their row is highlighted yellow. You can only delete one employee at a time.

Once the participant row is yellow, you can click on the "Delete" button in the toolbar.

Remember - you are not deleting the participant from your plan, you are removing them from this pay period.

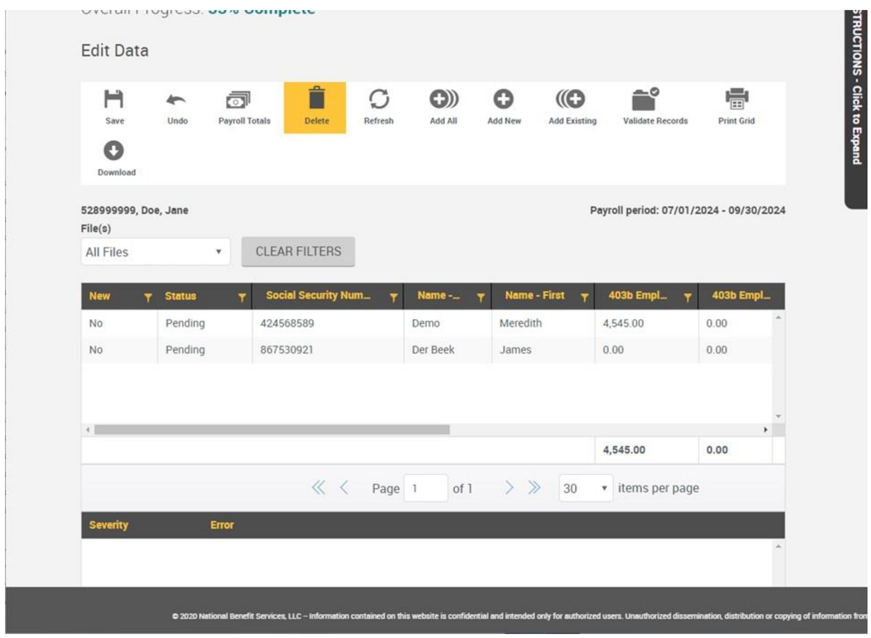




A little popup will appear at the top of the screen asking you to verify that you do want to delete the participant from the pay period.

Click "OK" to delete the participant.

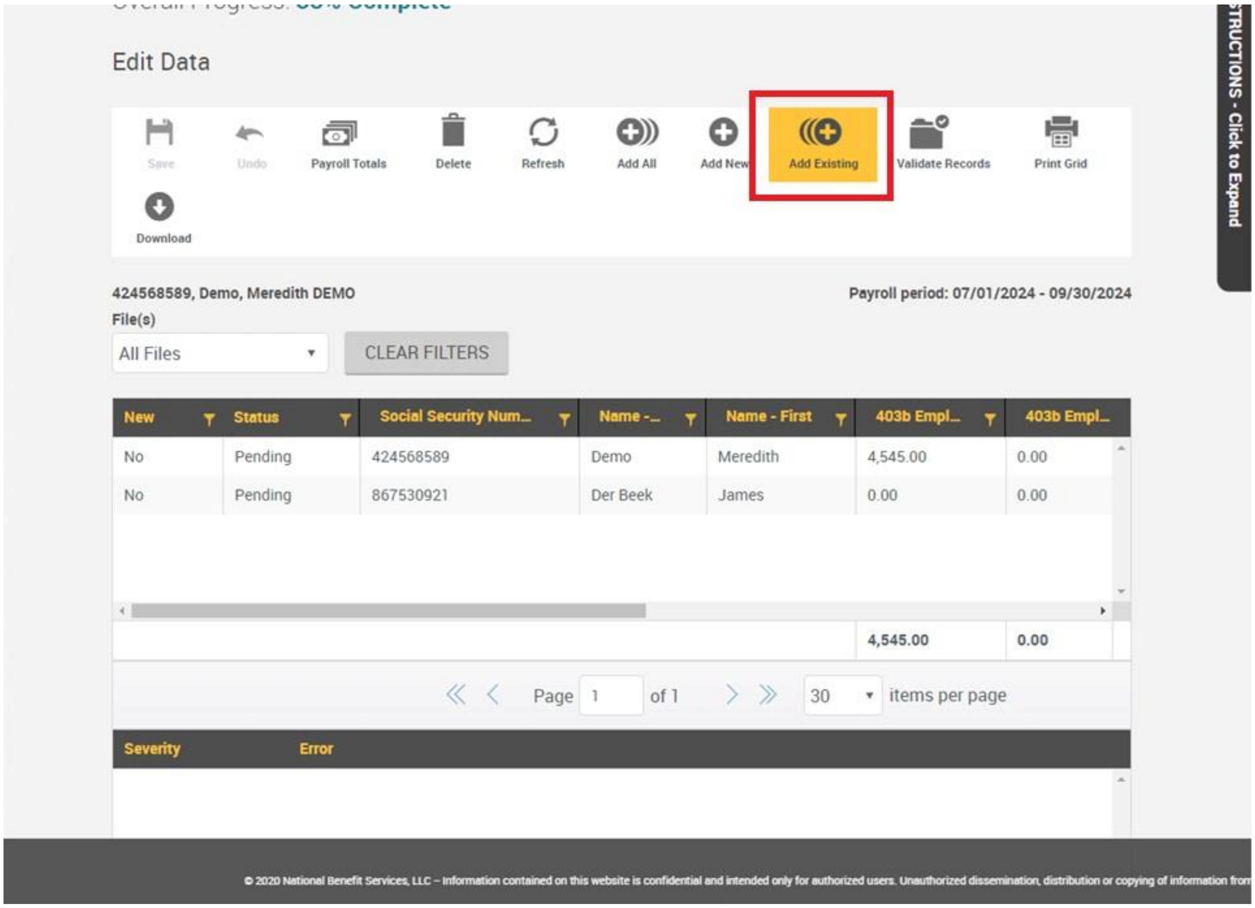
The participant no longer appears in this pay period.



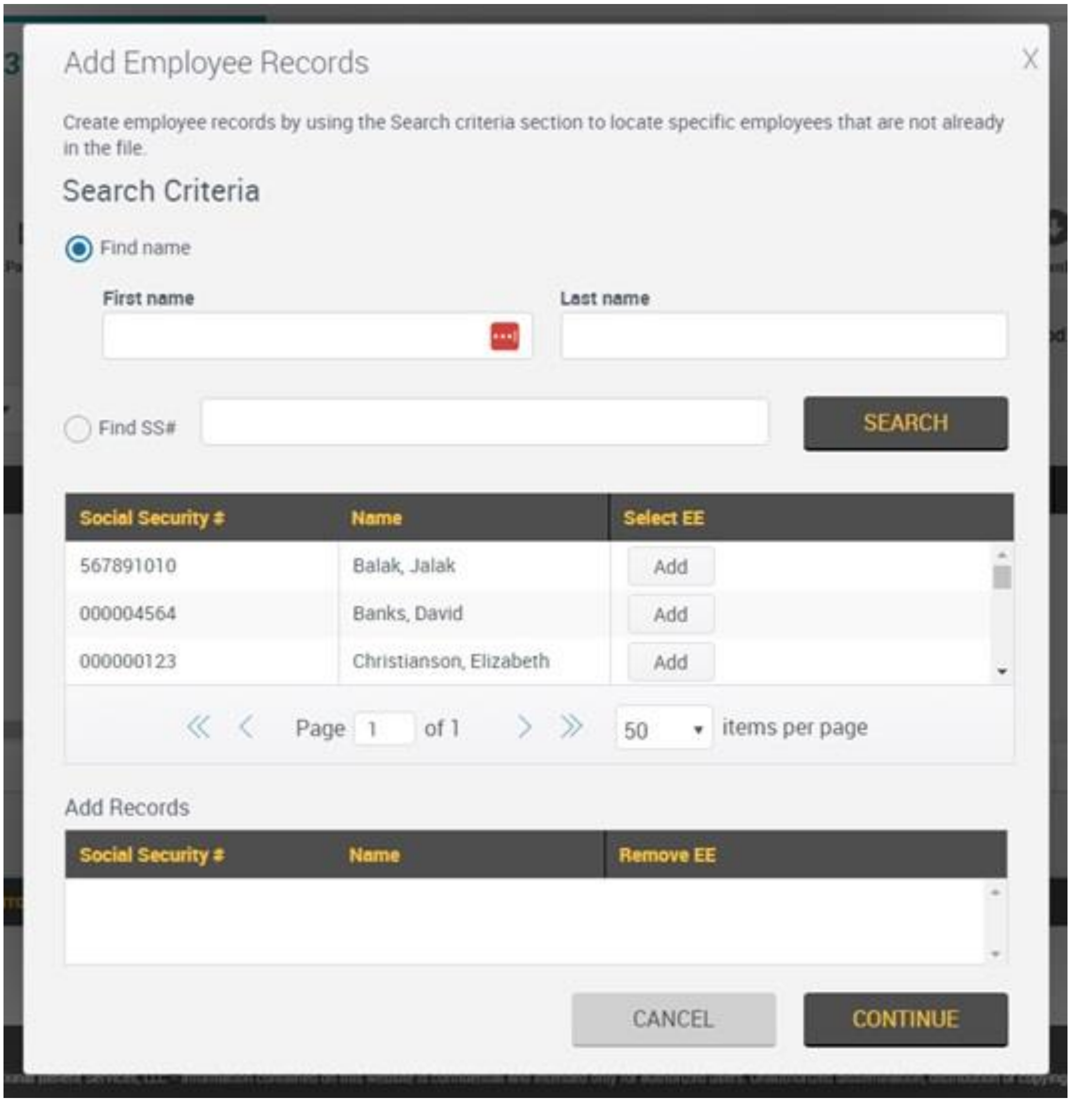
Add Participant - Add Existing

If you accidentally removed a participant, or a participant decided to resume making contributions in your plan, you can add them back to your payroll period.

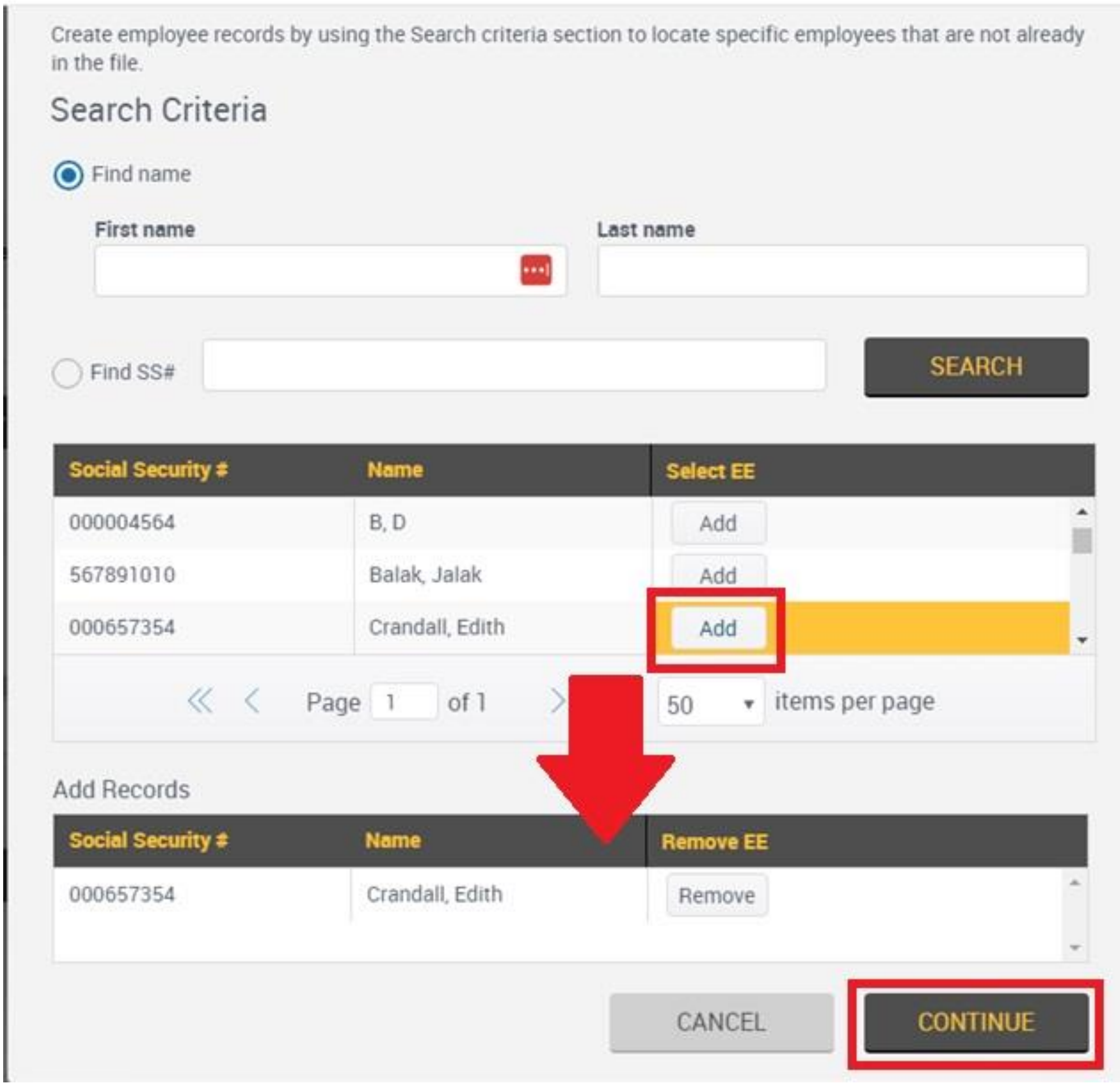
On the toolbar, click on the "Add Existing" button.



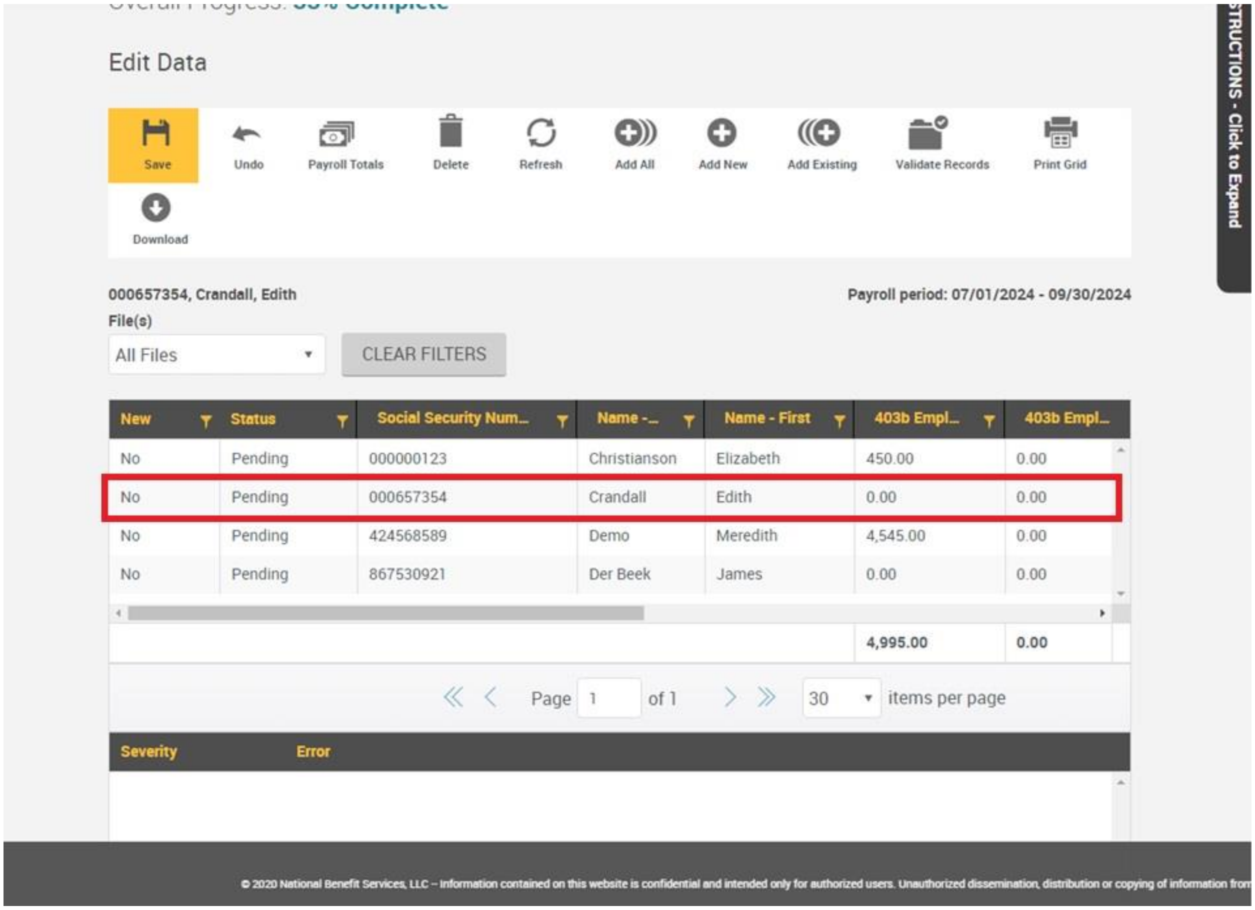
You can search by participant's first or last name, social security number, or you can scroll through the list of all the participants who have ever been in your plan.



Click the "Add" button next to the participant's name. This adds them to the "Add Records" section. Once you have everyone added to your Add Records section, click on the "Continue" button.



The participant is now on the participant list and is ready to have their contribution added.



Add Participant - Add New

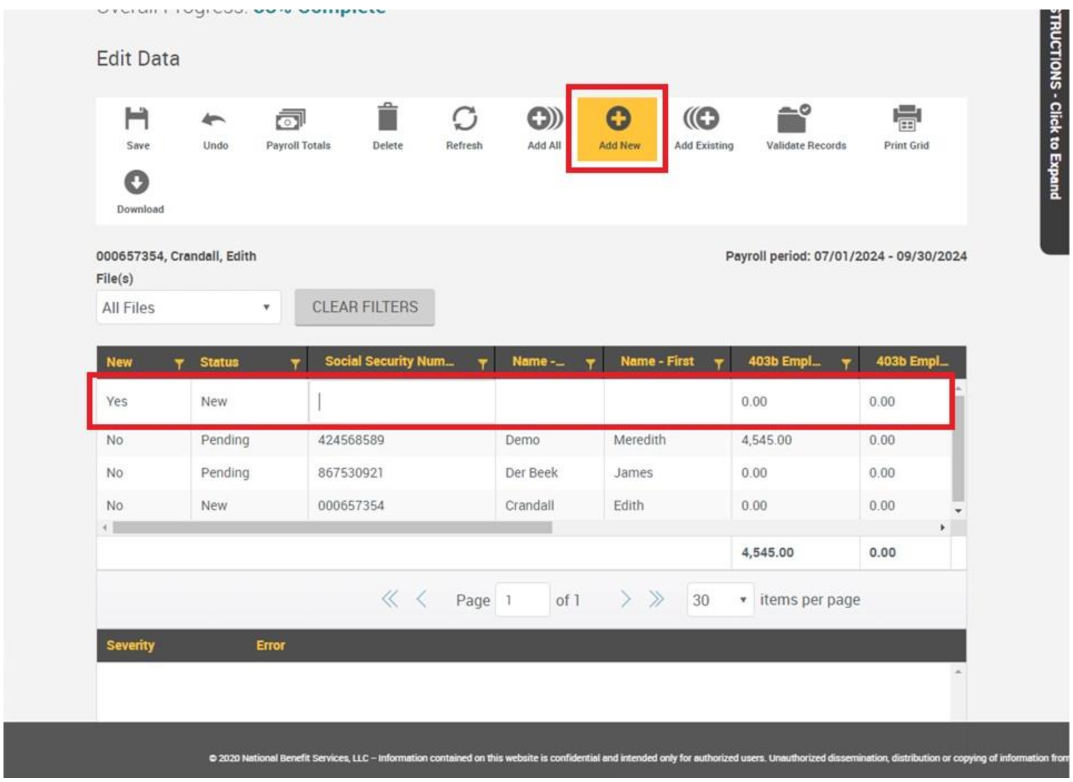
Yes, you can add a new participant to your plan. When you use this option, you are creating a holding space for the client's contributions. Once your payroll is submitted, NBS will receive a notification that there is a new participant in your plan. We will send a request to the Ameriprise home office to have the participant's account linked to your plan. If Ameriprise is able to locate an account that is open and in good standing, they will link the account to your plan at NBS. If they are unable to locate an open account, or if the account is not in good standing, they will instruct us to return the funds to you. You will receive an Ameriprise check in the mail within one to two weeks.

It's a good idea to wait to add a new participant to your plan until they have an open Ameriprise account. Your Ameriprise advisor should fill out and send an Ameriprise 402450 form to the Ameriprise home office with your new participant's account information. If your advisor has done this, you may want to check "Add Existing" (in case the account has already been linked to our system) before you try to "Add New."

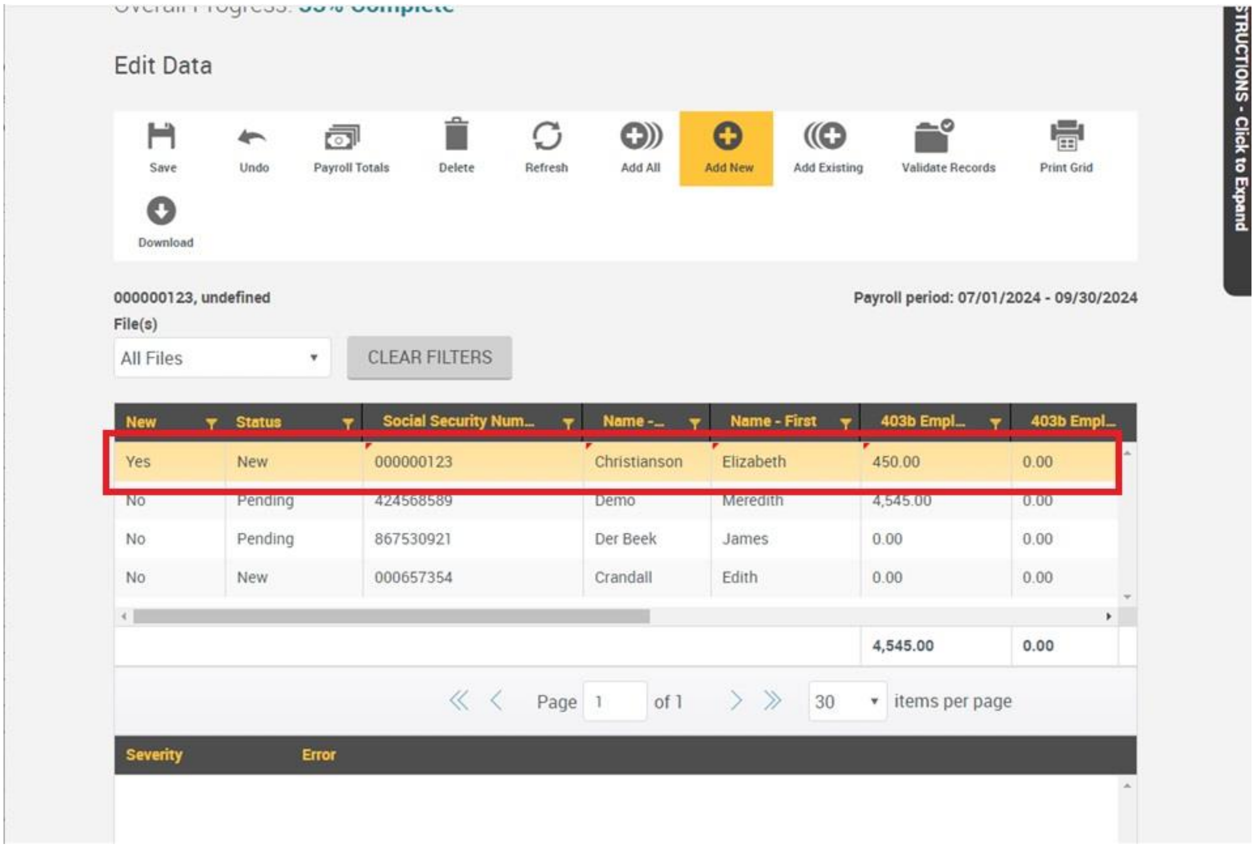
To add a new participant, click on the "Add New" button on the toolbar.

A new line will appear at the top of your payroll grid.

Type in the participant's social security number, last name, first name, and contribution amount.



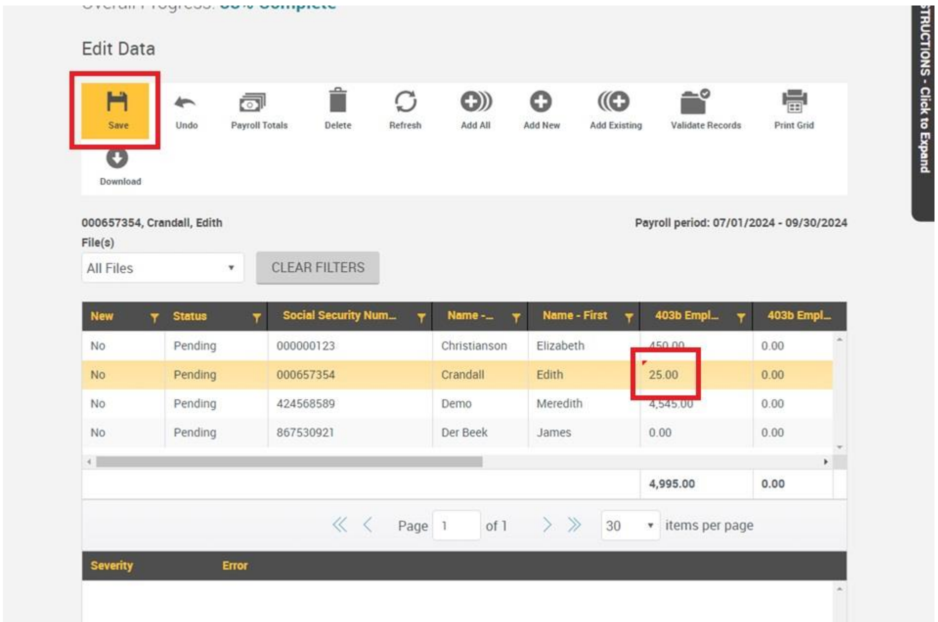
The new participant's information will all have red triangles at the top until the payroll period is saved or processed.



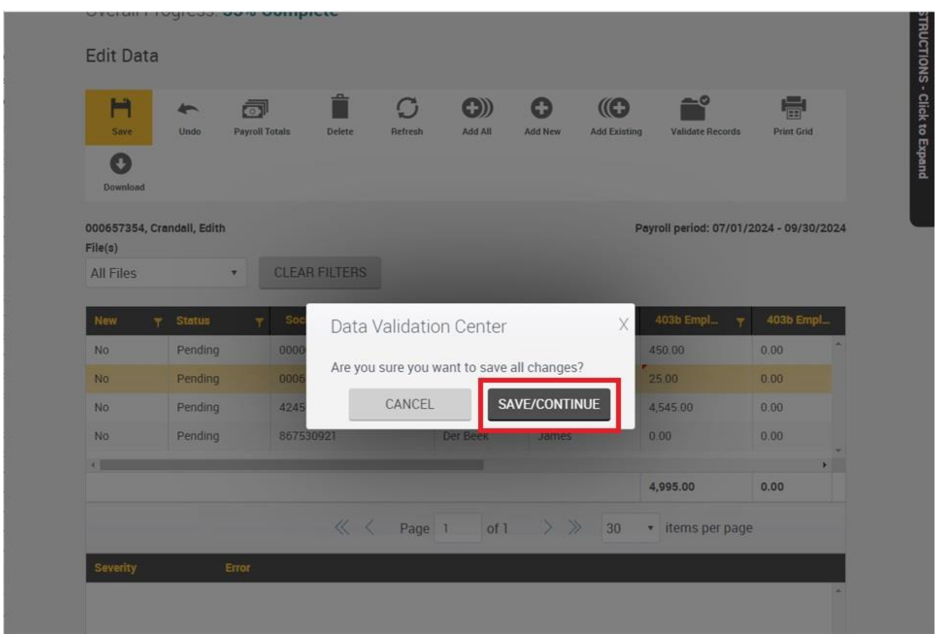
Save Payroll

If you have any unsaved changes (red triangles), you may wish to save your payroll period.

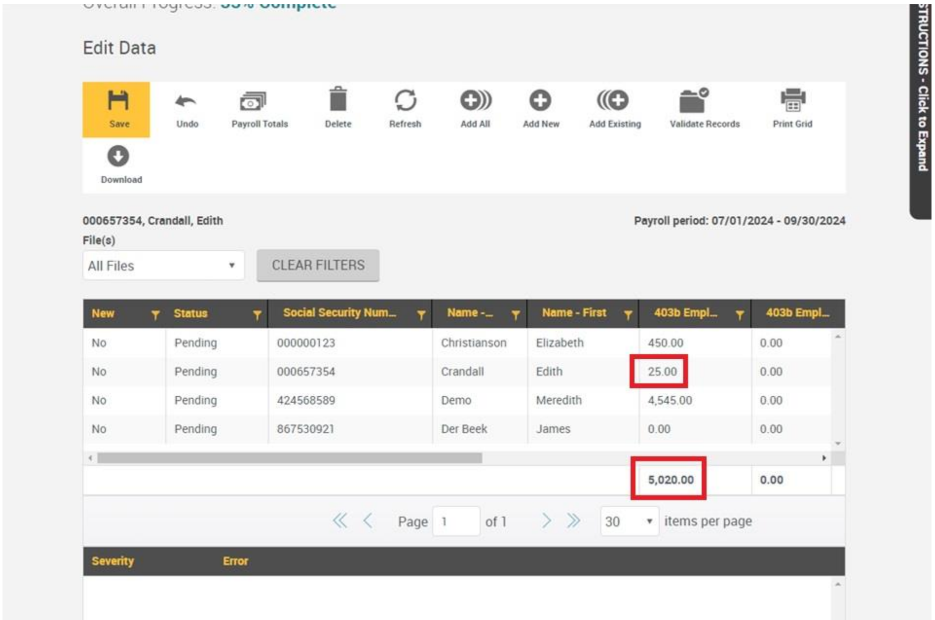
Click the "Save" button on the toolbar.



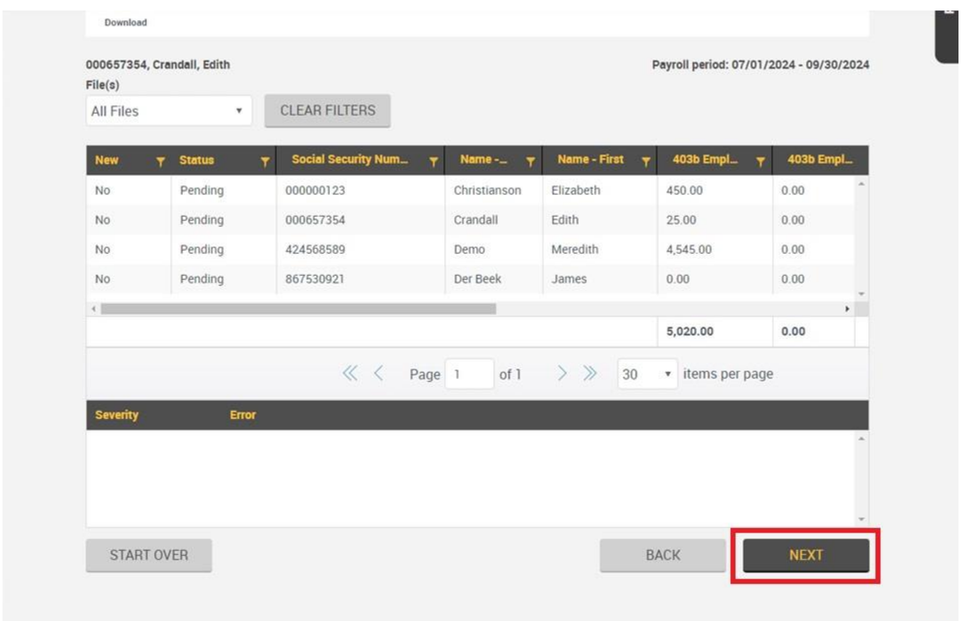
On the popup, verify that you want to "Save/Continue."



Saving the pay period removed the red triangle from Edith Crandall's contribution and it updated the total contribution amount at the bottom of the grid.

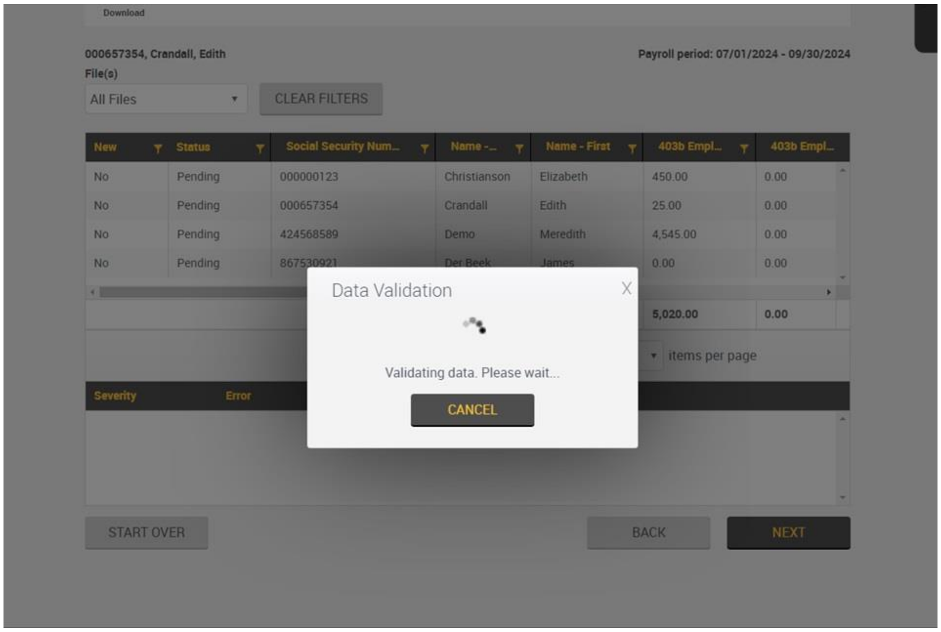


When you have your current participant list updated with the correct contribution amounts, scroll down a little bit to see the "Next" button. Click the "Next" button to go to the Data Validation step.

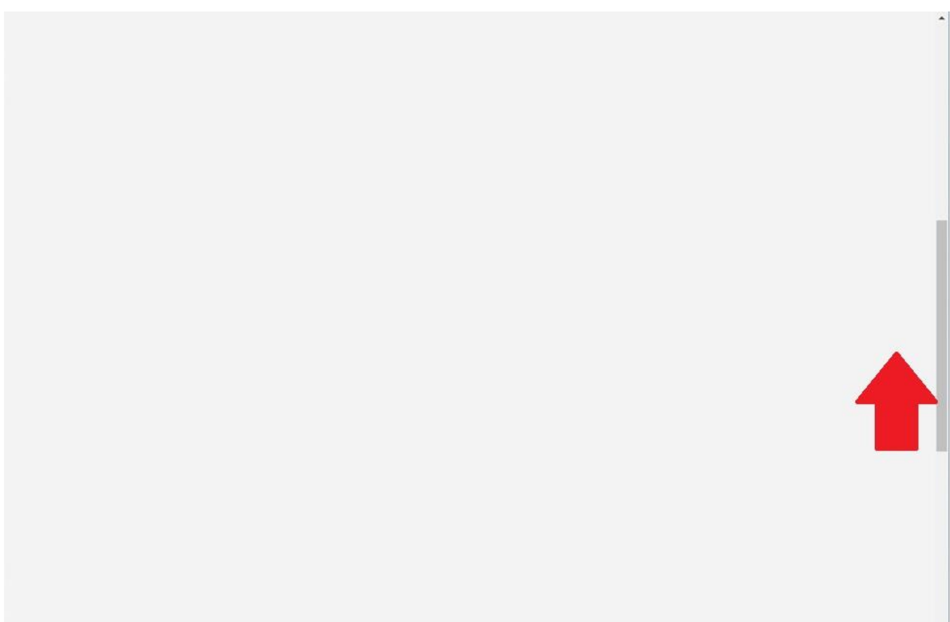


Data Validation & Completion

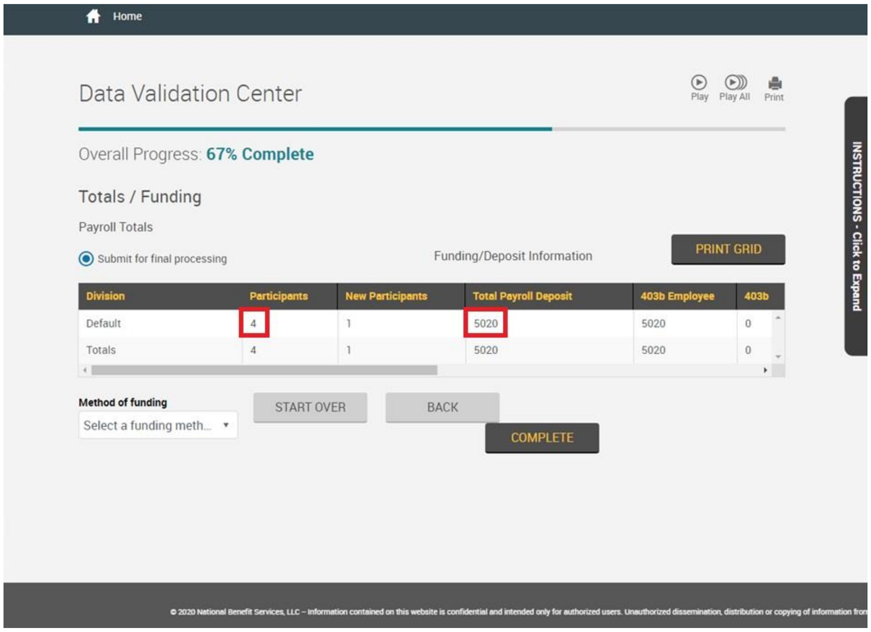
You will get a popup that lets you know your data is validating. This may take a couple of minutes.



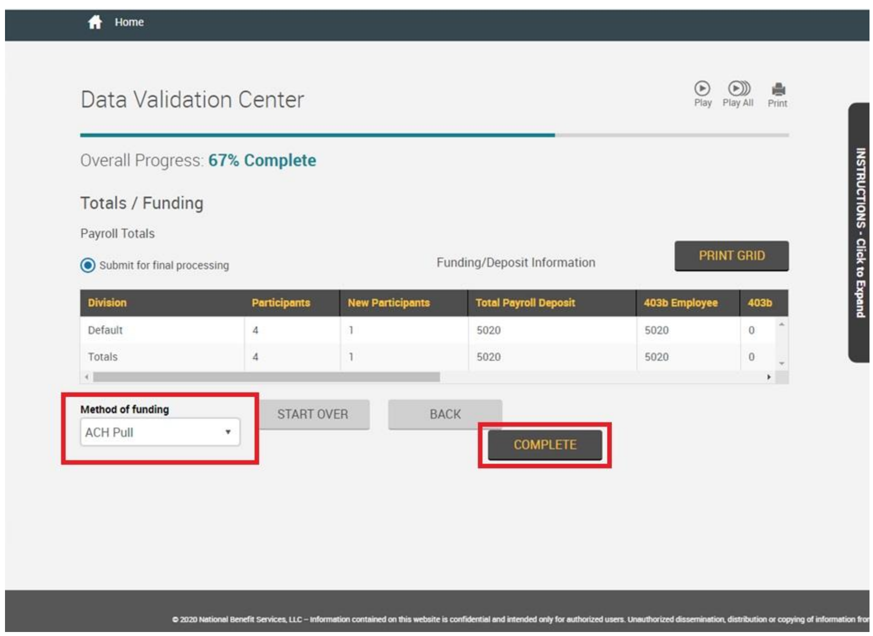
Did a blank page load? Scroll up.



In the "Data Validation Center," verify your number of participants (number of names in your pay period, regardless of whether they are receiving funds) and the Total Payroll Deposit.



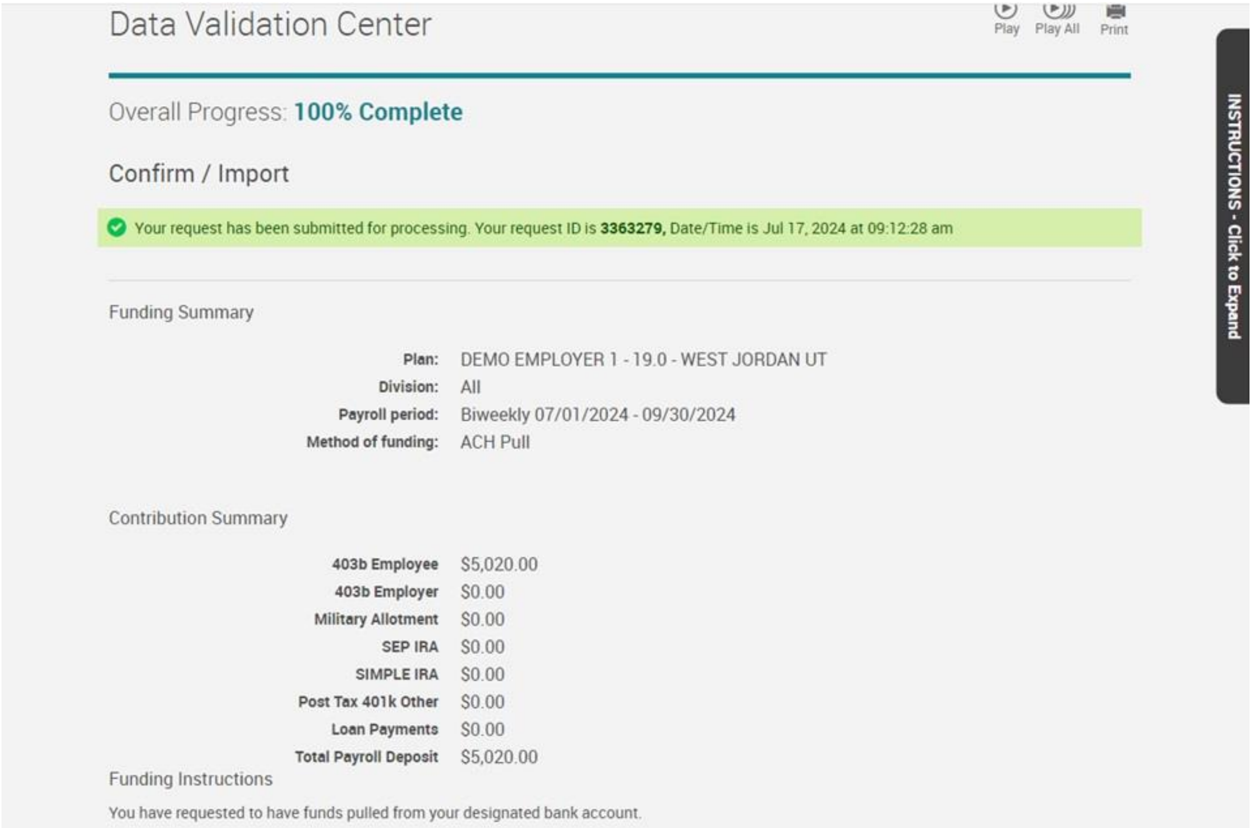
Choose your "Method of funding" from the dropdown. You should only have one option. For most plans, the option will be "ACH Pull."



Once you choose your "Method of funding," you can click the "Complete" button.

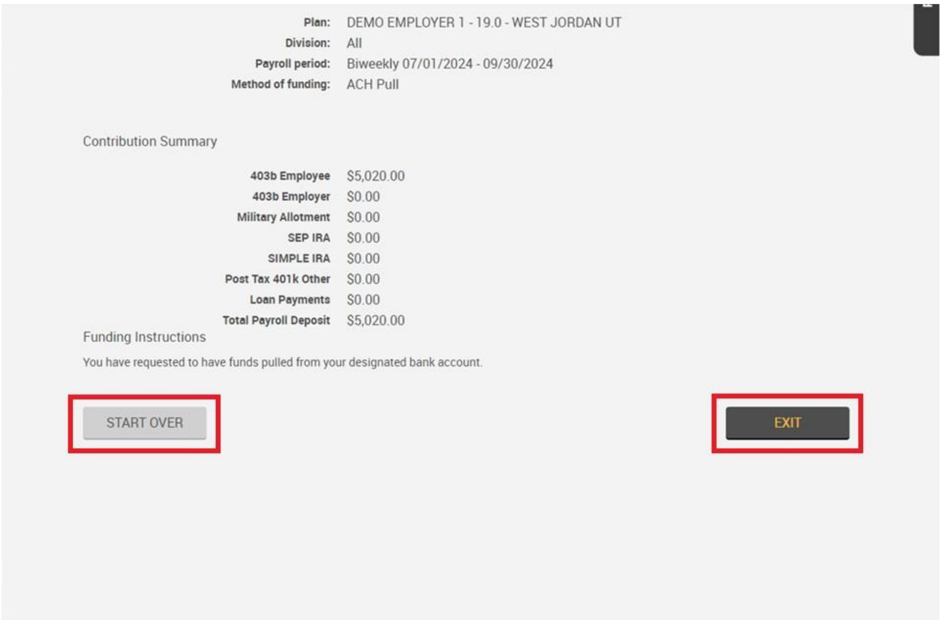
Clicking the "Complete" button authorizes us to begin the process of pulling the funds from your bank account. We will begin the process the following business day. If you notice an error, and want your pay period deleted, call us at 877-938-7310 to see if we can delete your transaction. If the pay period has already been submitted, we will not be able to delete the transaction.

Once your transaction is "Complete" a Confirm/Import page will load. If you would like a confirmation, please print or save this page. Once you close this page, we cannot generate it again. We can send you an email (upon request) with the same information, but we cannot get this exact page back.



Exit or Start Over

At the bottom of the Confirm/Import page, there are two buttons - "Start Over" and "Exit."



Click "Exit" if you wish to go back to your Plan Dashboard.

If you wish to make another contribution, please click the "Start Over" button to be taken back to the page where you can choose your Process Method for your next contribution.

The next time you make contributions, be sure to choose the "Copy information from a previous payroll period" option and **choose the pay period you just submitted** from the "Select pay period" dropdown.