

# Website User Guide:

## Copy From Previous Pay Period

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# PSW User Guide: Copy from Previous

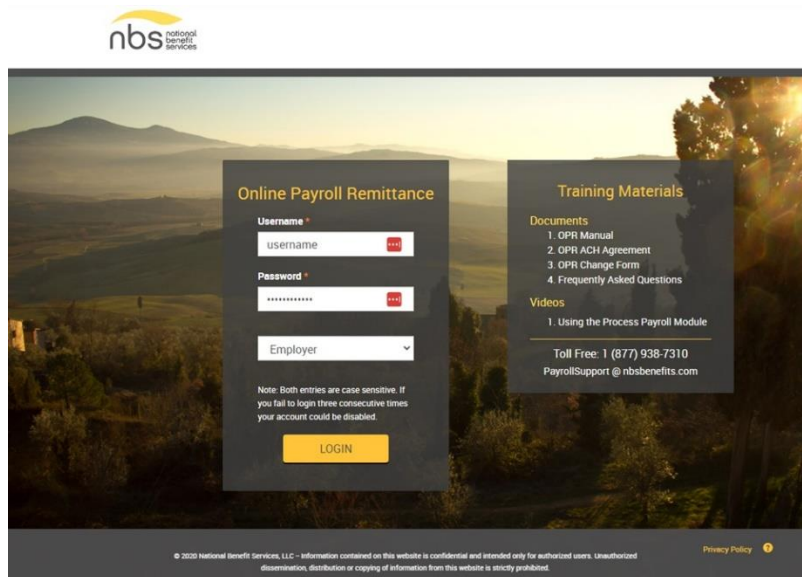
One of the Process Methods on the website is "Copy information from a previous payroll period." This method copies the participants and allocations from a selected pay period to a new pay period. This is helpful when employers make the same or similar contributions each pay period. It also saves one 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

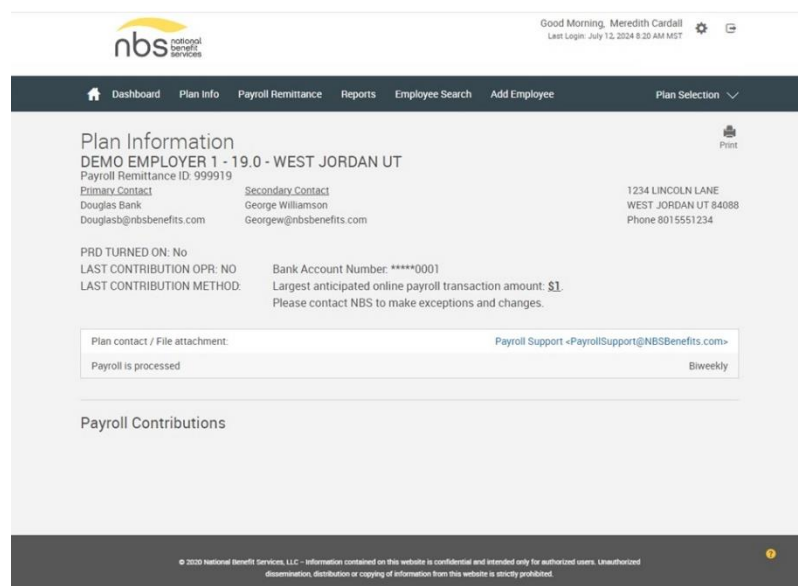
<https://www.nbspayroll.com/>

Enter your username and password.

Click "Login."



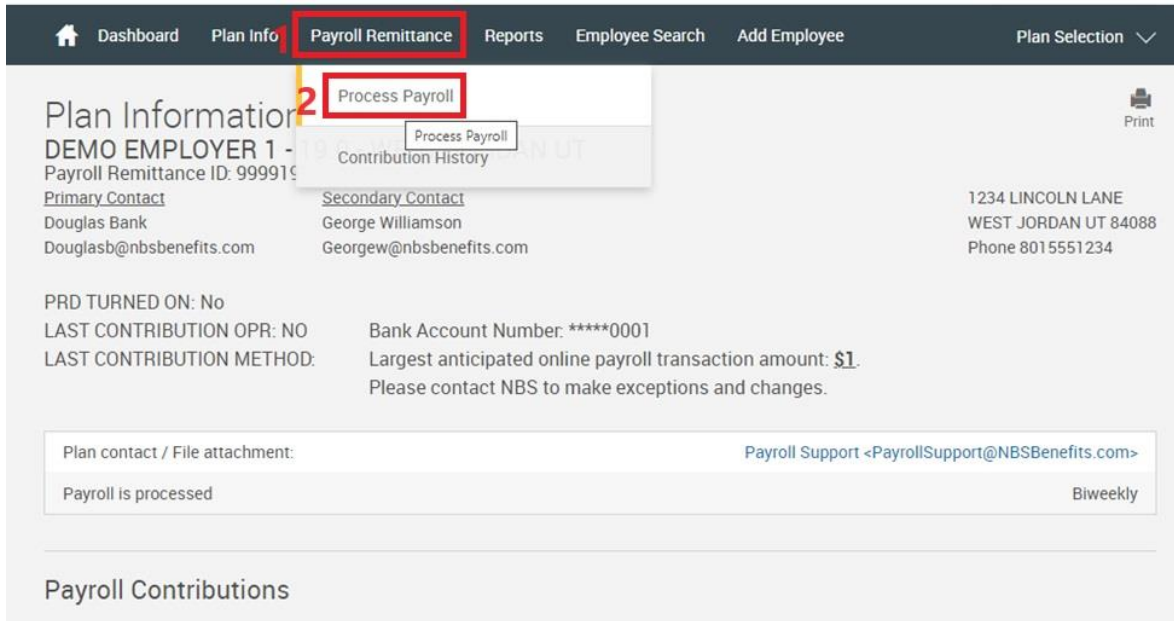
Your plan Dashboard will load.



# Choose Process Method

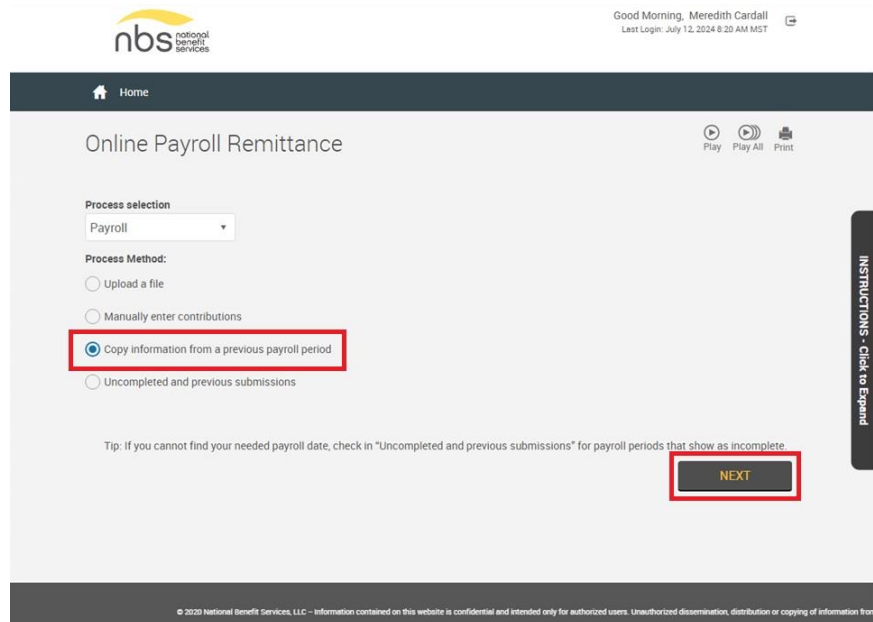
To process contributions, on the dark toolbar at the top, select "Payroll Remittance."

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.

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Biweekly 0	09-14-2024-09-27-2024	0	0
Default	Not started	Biweekly 0	07-01-2024-09-30-2024	0	0

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.

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Biweekly 0	09-14-2024-09-27-2024	0	0
Default	Not started	Biweekly 0	07-01-2024-09-30-2024	0	0

Overall Progress: 0% Complete

Select Pay Period

Select division  
All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Biweekly 0	09-14-2024-09-27-2024	0	0
Default	Not started	Biweekly 0	07-01-2024-09-30-2024	0	0

Select pay period

08-17-2024-08-30-2024

08-03-2024-08-16-2024

04-01-2024-06-30-2024

Select pay period

START OVER BACK NEXT

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.

Overall Progress: 0% Complete

Select Pay Period

Select division  
All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Biweekly 0	09-14-2024-09-27-2024	0	0
Default	Not started	Biweekly 0	07-01-2024-09-30-2024	0	0

Select Previous Pay Period To Copy

Select pay schedule  
Biweekly 0

Select pay period  
08-17-2024-08-30-...

START OVER BACK NEXT

INSTRUCTIONS - Click to Expand

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# 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.

Overall Progress: 80% Complete

### Edit Data

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

Payroll period: 07/01/2024 - 09/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Num...	Name - ...	Name - First	403b Empl...	403b Empl...
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00
No	Pending	528999999	Doe	Jane	0.00	0.00
					4,545.00	0.00

<< < Page 1 of 1 > >> 30 items per page

Severity Error

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INSTRUCTIONS - Click to Expand

## Edit Dollar Amounts

Overall Progress: 100% Complete

Edit Data

000657354, Crandall, Edith Payroll period: 07/01/2024 - 09/30/2024

New	Status	Social Security Num...	Name	Name - First	403b Empl...	403b Empl...
No	Pending	000000123	Christianson	Elizabeth	450.00	0.00
No	Pending	000657354	Crandall	Edith	25.00	0.00
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00

4,995.00 0.00

Page 1 of 1 30 items per page

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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.*

Overall Progress: 99% Complete

### Edit Data

Save Undo Payroll Totals **2** Delete Refresh Add All Add New Add Existing Validate Records Print Grid Download

528999999, Doe, Jane Payroll period: 07/01/2024 - 09/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Num...	Name -	Name - First	403b Empl...	403b Empl...
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00
<b>1</b> No	Pending	528999999	Doe	Jane	0.00	0.00

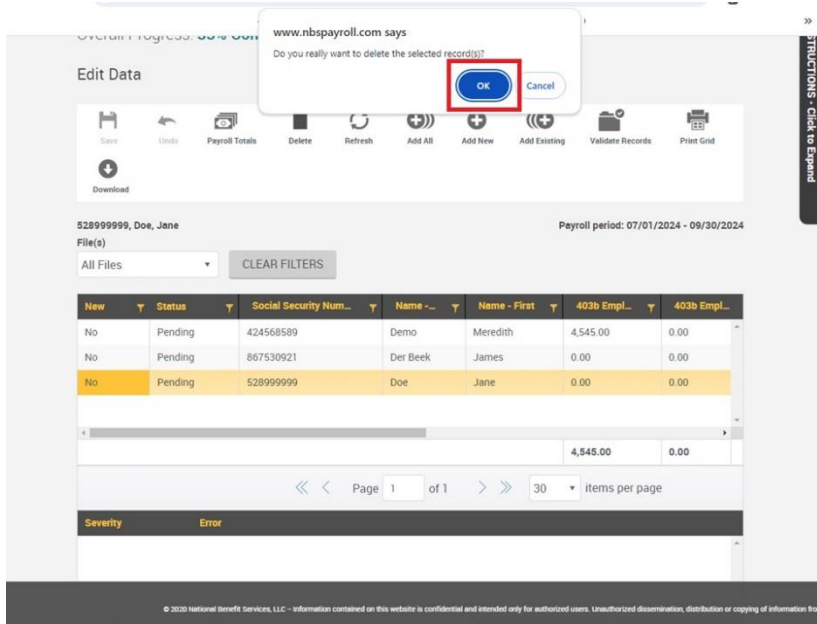
4,545.00 0.00

Page 1 of 1 30 items per page

Severity Error

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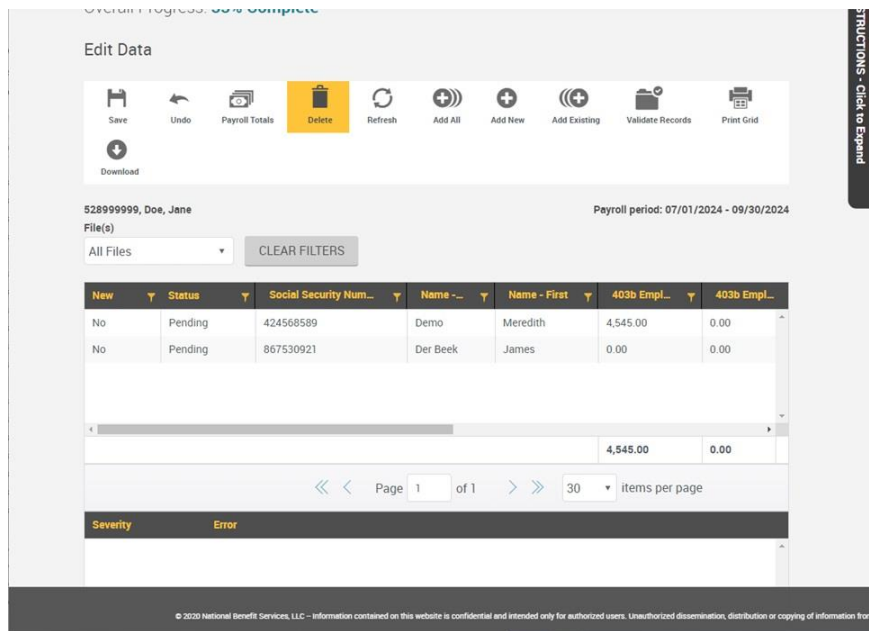
INSTRUCTIONS - Click to Expand



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.

The screenshot shows the 'Edit Data' interface. At the top, there is a toolbar with several icons: Save, Undo, Payroll Totals, Delete, Refresh, Add All, Add New, Add Existing (highlighted with a red box), Validate Records, and Print Grid. Below the toolbar, the text '424568589, Demo, Meredith DEMO' is displayed on the left, and 'Payroll period: 07/01/2024 - 09/30/2024' is on the right. A 'File(s)' dropdown menu is set to 'All Files' with a 'CLEAR FILTERS' button next to it. Below this is a table with the following data:

New	Status	Social Security Num...	Name -...	Name - First	403b Empl...	403b Empl...
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00

Below the table, there is a pagination control showing 'Page 1 of 1' and '30 items per page'. At the bottom, there is a 'Severity' section with an 'Error' message.

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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.

### Add Employee Records

Create employee records by using the Search criteria section to locate specific employees that are not already in the file.

#### Search Criteria

Find name

First name  Last name

Find SS#

**SEARCH**

Social Security #	Name	Select EE
567891010	Balak, Jalak	Add
000004564	Banks, David	Add
000000123	Christianson, Elizabeth	Add

Page 1 of 1 50 items per page

#### Add Records

Social Security #	Name	Remove EE

**CANCEL** **CONTINUE**

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.

Create employee records by using the Search criteria section to locate specific employees that are not already in the file.

### Search Criteria

Find name

First name  Last name

Find SS#

**SEARCH**

Social Security #	Name	Select EE
000004564	B, D	Add
567891010	Balak, Jalak	Add
000657354	Crandall, Edith	Add

Page 1 of 1 50 items per page

### Add Records

Social Security #	Name	Remove EE
000657354	Crandall, Edith	Remove

**CANCEL** **CONTINUE**

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

Overall Progress: **88% Complete**

### Edit Data

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

000657354, Crandall, Edith Payroll period: 07/01/2024 - 09/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Num...	Name - ...	Name - First	403b Empl...	403b Empl...
No	Pending	000000123	Christianson	Elizabeth	450.00	0.00
No	Pending	000657354	Crandall	Edith	0.00	0.00
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00
					4,995.00	0.00

<< < Page 1 of 1 > >> 30 items per page

Severity Error

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INSTRUCTIONS - Click to Expand

## 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.

Instructions - Click to Expand

000657354, Crandall, Edith Payroll period: 07/01/2024 - 09/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Num...	Name -	Name - First	403b Empl...	403b Empl...
Yes	New				0.00	0.00
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00
No	New	000657354	Crandall	Edith	0.00	0.00
					4,545.00	0.00

Page 1 of 1 30 items per page

Severity Error

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

Overall Progress: 88% Complete

### Edit Data

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

Download

000000123, undefined Payroll period: 07/01/2024 - 09/30/2024

File(s)  
All Files CLEAR FILTERS

New	Status	Social Security Num...	Name - ...	Name - First	403b Empl...	403b Empl...
Yes	New	000000123	Christianson	Elizabeth	450.00	0.00
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00
No	New	000657354	Crandall	Edith	0.00	0.00

4,545.00 0.00

Page 1 of 1 30 items per page

Severity Error

INSTRUCTIONS - Click to Expand



## 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.

The screenshot shows the 'Edit Data' interface. The toolbar includes buttons for Save, Undo, Payroll Totals, Delete, Refresh, Add All, Add New, Add Existing, Validate Records, and Print Grid. The 'Save' button is highlighted with a red box. Below the toolbar, the employee data table is displayed. The row for Edith Crandall is highlighted in yellow, and a red triangle is visible in the '403b Empl...' column, which is also highlighted with a red box. The table shows the following data:

New	Status	Social Security Num...	Name - ...	Name - First	403b Empl...	403b Empl...
No	Pending	000000123	Christianson	Elizabeth	450.00	0.00
No	Pending	000657354	Crandall	Edith	25.00	0.00
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00

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

The screenshot shows the 'Edit Data' interface with a 'Data Validation Center' popup dialog box. The dialog asks 'Are you sure you want to save all changes?' and has 'CANCEL' and 'SAVE/CONTINUE' buttons. The 'SAVE/CONTINUE' button is highlighted with a red box. The background shows the same employee data table as in the previous screenshot.

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.

**Edit Data**

000657354, Crandall, Edith Payroll period: 07/01/2024 - 09/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Num...	Name - ...	Name - First	403b Empl...	403b Empl...
No	Pending	000000123	Christianson	Elizabeth	450.00	0.00
No	Pending	000657354	Crandall	Edith	25.00	0.00
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00
					5,020.00	0.00

Page 1 of 1 30 items per page

Severity Error

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.

Download

000657354, Crandall, Edith Payroll period: 07/01/2024 - 09/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Num...	Name - ...	Name - First	403b Empl...	403b Empl...
No	Pending	000000123	Christianson	Elizabeth	450.00	0.00
No	Pending	000657354	Crandall	Edith	25.00	0.00
No	Pending	424568589	Demo	Meredith	4,545.00	0.00
No	Pending	867530921	Der Beek	James	0.00	0.00
					5,020.00	0.00

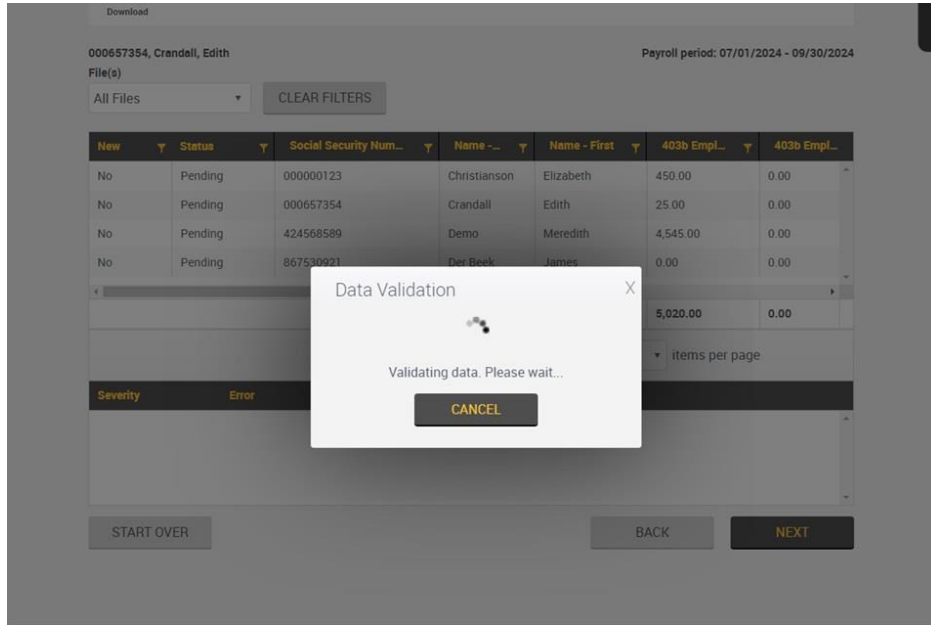
Page 1 of 1 30 items per page

Severity Error

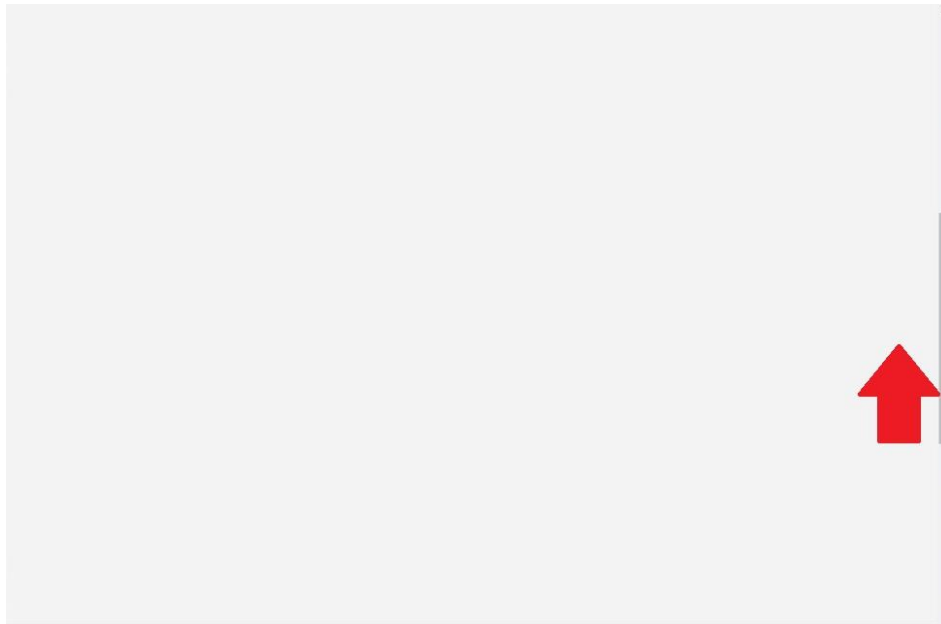
START OVER BACK NEXT

# 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.

The screenshot shows the "Data Validation Center" interface. At the top, there is a "Home" button and a progress bar indicating "Overall Progress: 67% Complete". Below this, the "Totals / Funding" section is visible, with a "Payroll Totals" section containing a radio button for "Submit for final processing" and a "PRINT GRID" button. A table displays the following data:

Division	Participants	New Participants	Total Payroll Deposit	403b Employee	403b
Default	4	1	5020	5020	0
Totals	4	1	5020	5020	0

Below the table, there is a "Method of funding" dropdown menu with the text "Select a funding meth...", and three buttons: "START OVER", "BACK", and "COMPLETE". A vertical sidebar on the right contains the text "INSTRUCTIONS - Click to Expand". At the bottom, there is a copyright notice: "© 2020 National Benefit Services, LLC - Information contained on this website is confidential and intended only for authorized users. Unauthorized dissemination, distribution or copying of information from".

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.

This screenshot is similar to the one above, but with red boxes highlighting the "Method of funding" dropdown menu, which now shows "ACH Pull", and the "COMPLETE" button. The table data remains the same. The vertical sidebar on the right still contains "INSTRUCTIONS - Click to Expand". The copyright notice at the bottom is also present.

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.

## Data Validation Center

Play Play All Print

Overall Progress: **100% Complete**

### Confirm / Import

✔ Your request has been submitted for processing. Your request ID is **3363279**, Date/Time is Jul 17, 2024 at 09:12:28 am

---

#### Funding Summary

Plan: DEMO EMPLOYER 1 - 19.0 - WEST JORDAN UT  
Division: All  
Payroll period: Biweekly 07/01/2024 - 09/30/2024  
Method of funding: ACH Pull

---

#### Contribution Summary

403b Employee	\$5,020.00
403b Employer	\$0.00
Military Allotment	\$0.00
SEP IRA	\$0.00
SIMPLE IRA	\$0.00
Post Tax 401k Other	\$0.00
Loan Payments	\$0.00
<b>Total Payroll Deposit</b>	<b>\$5,020.00</b>

#### Funding Instructions

You have requested to have funds pulled from your designated bank account.

INSTRUCTIONS - Click to Expand

# Exit or Start Over

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

Plan: DEMO EMPLOYER 1 - 19.0 - WEST JORDAN UT  
Division: All  
Payroll period: Biweekly 07/01/2024 - 09/30/2024  
Method of funding: ACH Pull

Contribution Summary

403b Employee	\$5,020.00
403b Employer	\$0.00
Military Allotment	\$0.00
SEP IRA	\$0.00
SIMPLE IRA	\$0.00
Post Tax 401k Other	\$0.00
Loan Payments	\$0.00
<b>Total Payroll Deposit</b>	<b>\$5,020.00</b>

Funding Instructions  
You have requested to have funds pulled from your designated bank account.

**START OVER**      **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.

Online Payroll Remittance

Play Play All Print

Process selection  
Payroll

Process Method:

- Upload a file
- Manually enter contributions
- Copy information from a previous payroll period
- Uncompleted and previous submissions

Tip: If you cannot find your needed payroll date, check in "Uncompleted and previous submissions" for payroll periods that show as incomplete.

**NEXT**

INSTRUCTIONS - Click to Expand