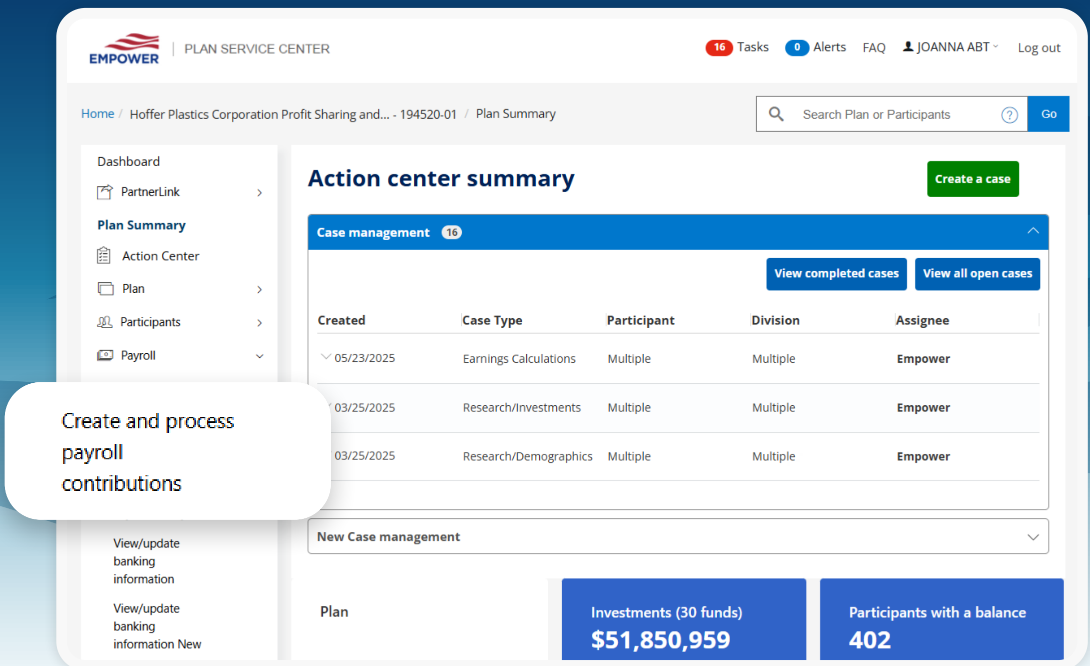


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# Your guide to processing payroll with Empower

**Payroll Data Interchange (PDI) File upload**

## Contents

# Best practices while processing your payroll

At Empower, we understand that processing payroll is one of the most important plan responsibilities. We're dedicated to your success and want to share best practices to help make processing your payroll contributions easy and efficient on the Empower platform.

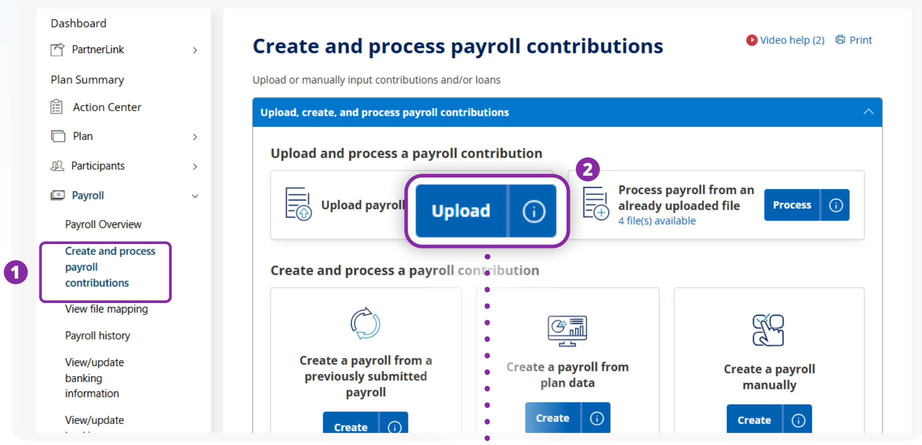
- Make sure your plan contacts have access to our Plan Service Center (PSC). An authorized signer can review who has access and **make necessary changes or additions** online under the *Contacts* menu.
- Ensure any changes from the deferral change report have been implemented in your payroll system.
- Confirm money types, payroll date, and loan withholdings/payments when processing payroll, entering payroll on the PSC, and before confirming your submission.
- Validate your bank account/funding to ensure accuracy. Using ACH debit allows Empower to pull and process your payroll and apply funds to participant accounts quickly, making it the preferred funding method.
- If you discover an error while processing your payroll, you can address it in real time. If you discover an error after processing your payroll, use **Empower Case Management** to initiate, monitor, and manage payroll corrections on demand.

# How it works

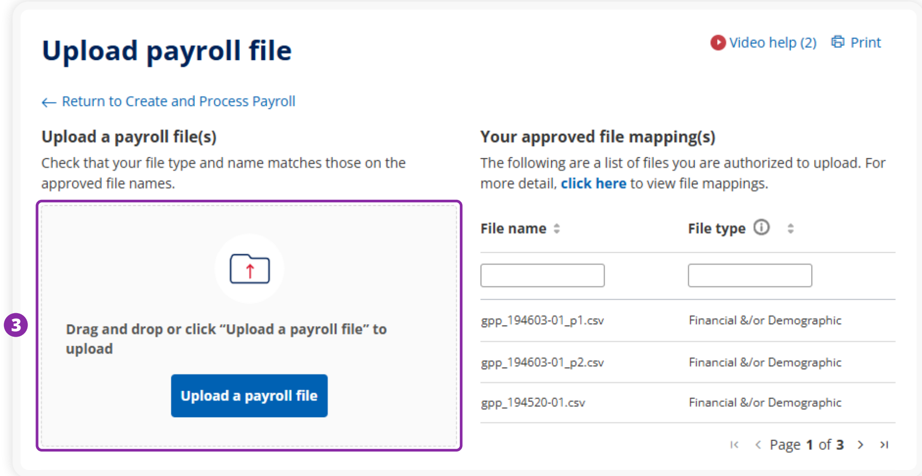
## Step 1

### Upload file and validate data

1. Once you've logged in to the Plan Service Center (PSC), use the left navigation menu to access *Payroll > Create and process payroll contributions*.
2. To get started, select the *Upload* button.




3. Drag and drop your file or click *Upload payroll file* to select a file. It should follow the naming conventions established during file mapping setup, which are displayed under "Your approved file mapping(s)."

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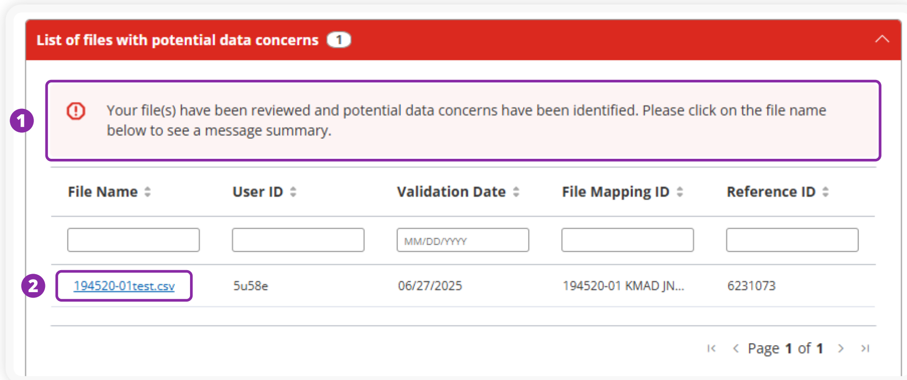
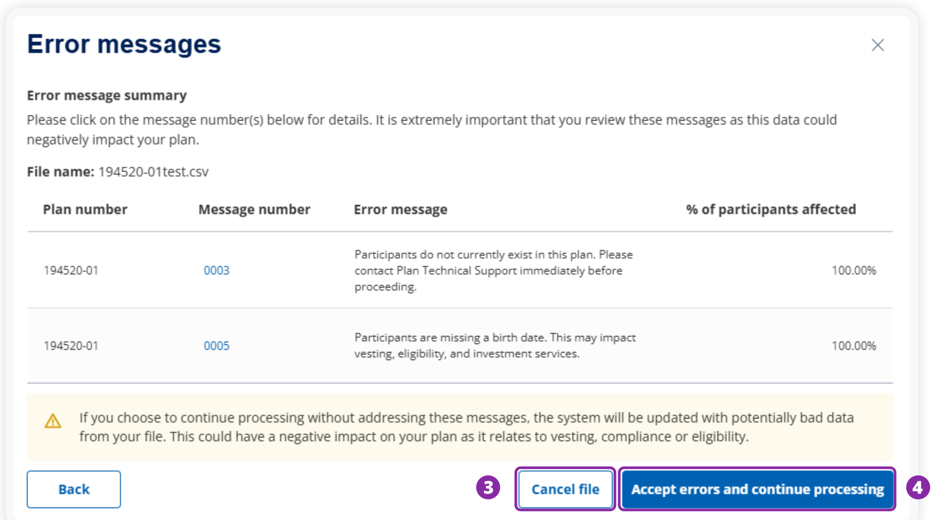
Note: File name should not contain any spaces or special characters. Asterisks (*) can be replaced with a date to help organize your file records.

1. Once your file has been added, the system will review the data at a plan level before updating participant accounts based on the information provided. If your file has potential data concerns that impact many records, including issues like missing or duplicate dates, you will be notified, and further review is required.




2. Click on the file name link to see the list of potential data concerns. Click each message number to review the error message.

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### After reviewing all error messages:

3. If you need to correct data, click *Cancel file*, make necessary updates, and re-upload the new file. The system will repeat the validation process.
4. If you determine the data concern(s) is not an error and Empower should continue processing the file, click *Accept all errors and continue processing* to upload.

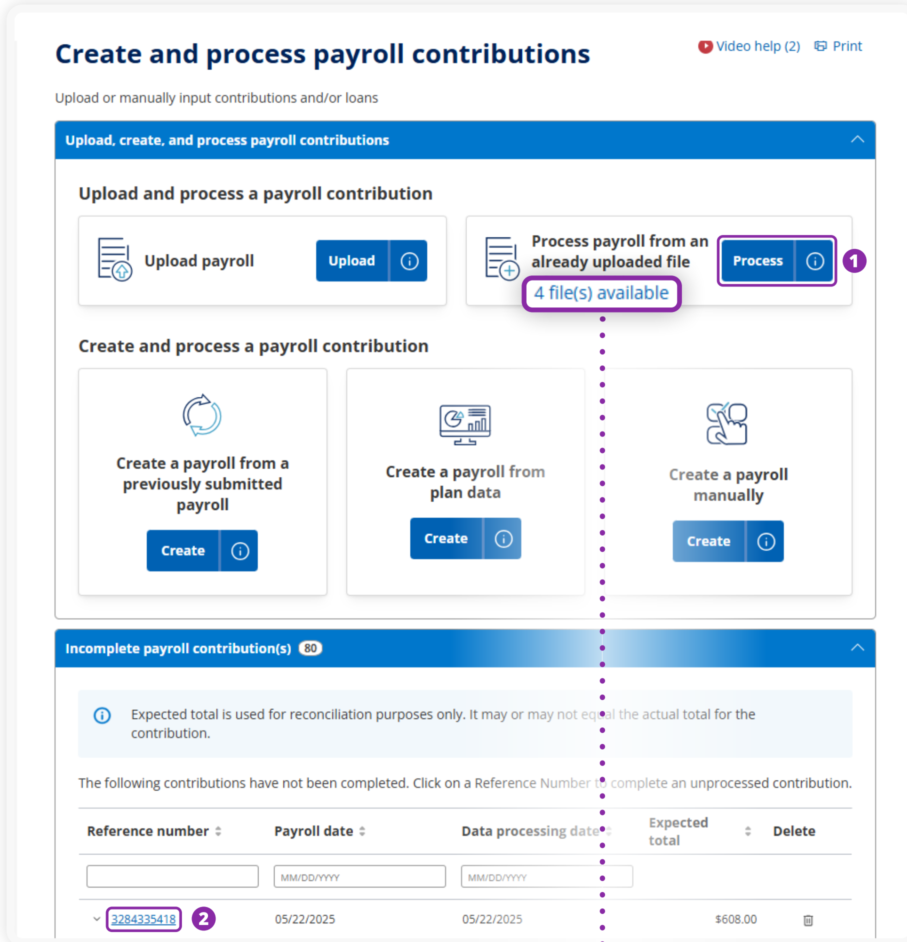
Once your file has been validated and uploaded, you will be brought back to the *Create and process payroll* landing page.

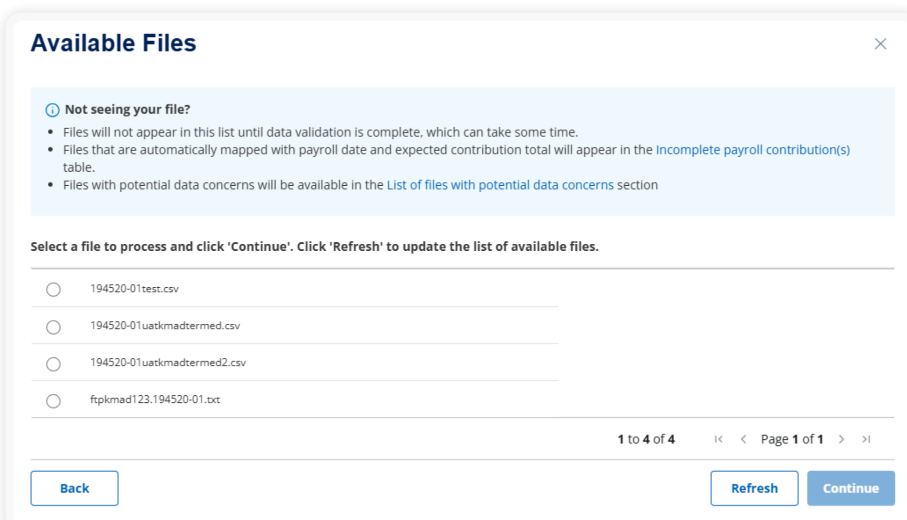
## Step 2

### Remit your file

- After your file has been uploaded, on-screen guidance will help you locate your file for next steps. The system will save information in real time, allowing you to pick up where you left off, if needed.

1. If you have a file available, click the *Process* button to select the file you want to process.
2. If you don't have a file available, visit the "Incomplete payroll contributions" section. Select the reference number of the payroll file you want to process.

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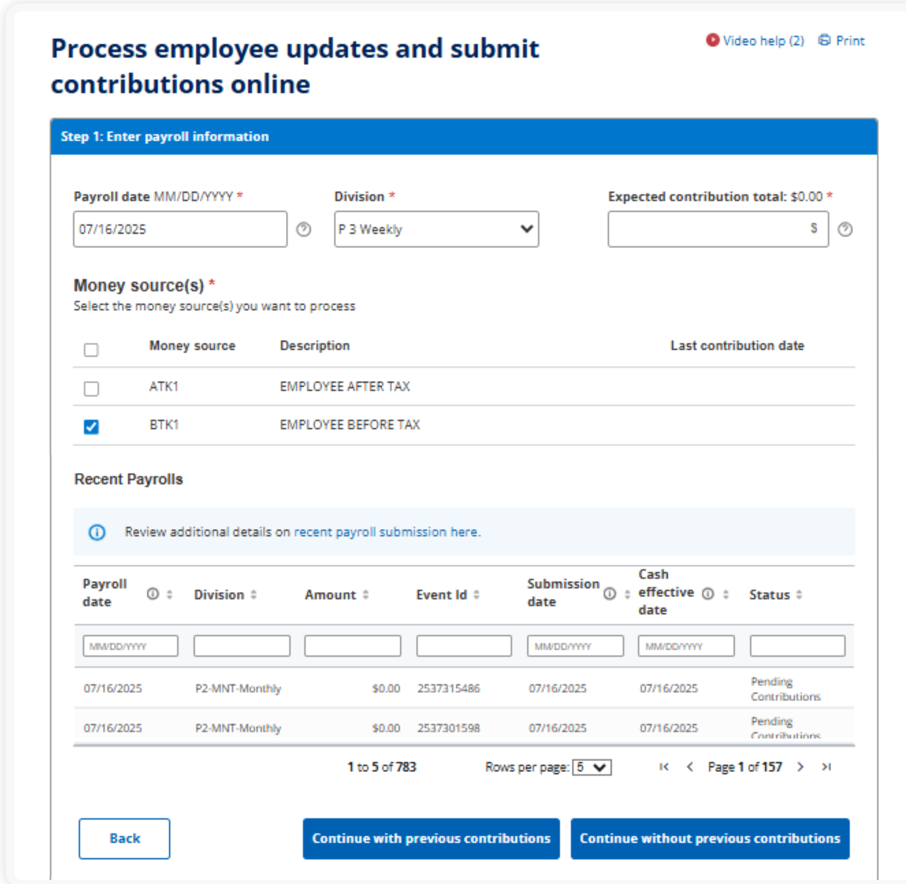
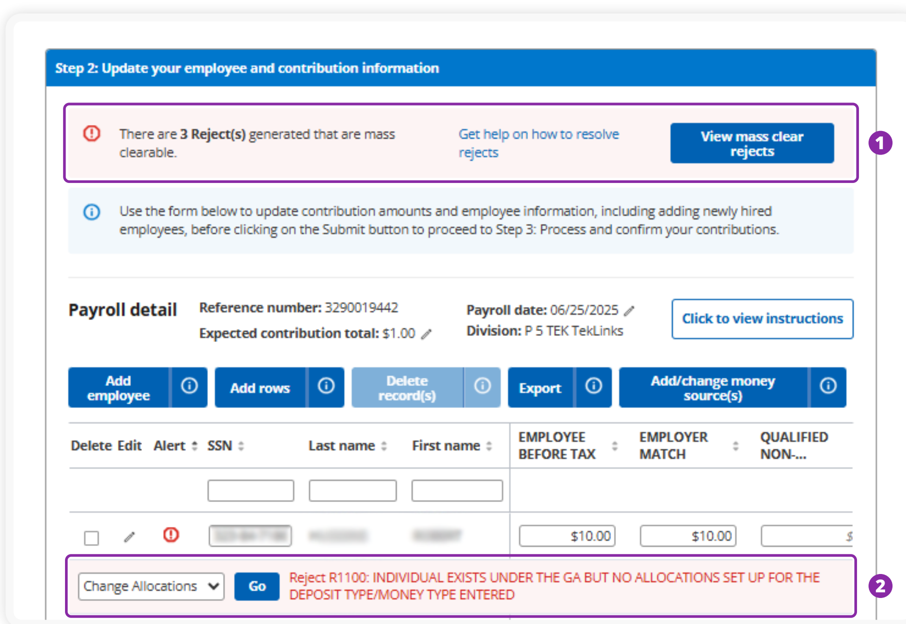
If there is no file available in either location, please refresh the page. If a file does not become available, there may be an issue with the file format. Please reach out to client services for assistance.

- Review required information and complete any blank fields before clicking the *Continue* button.




1. Real-time error detection checks the data for cash rejections. These errors appear in red and must be cleared before moving to the next step.
2. On-screen guidance will provide direction on how to resolve the rejection based on the type of error.

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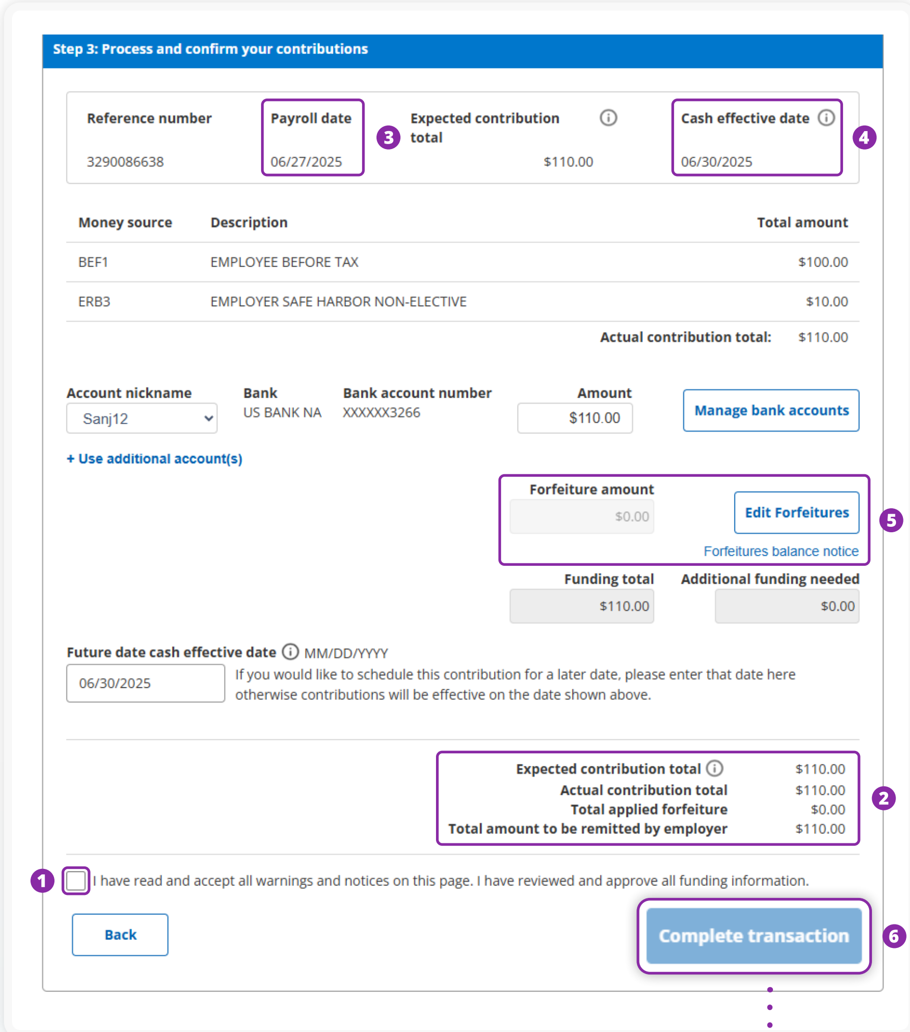
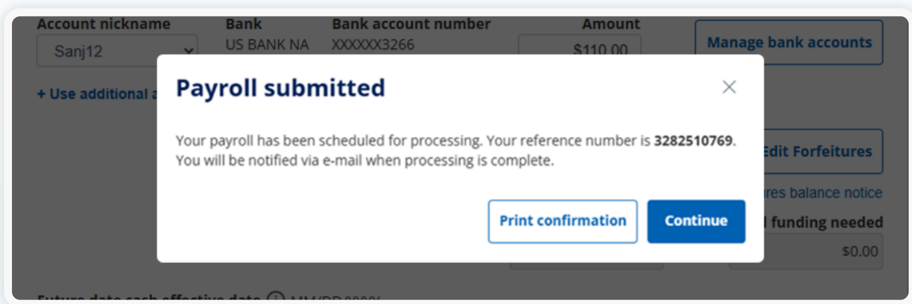
## Step 3

### Process and confirm your contributions

1. Check boxes to accept all warnings and notices.
2. Review the expected contribution total and actual contribution total to make sure they match. If they don't, the system will notify you. The actual contribution total will be the amount debited.
3. Payroll date refers to the plan sponsor payroll date.
4. Cash effective date is the date participant accounts will be funded.
5. Forfeitures can be used with plans utilizing ACH debit and will be visible as a funding source.
6. Click *Complete transaction* to submit the payroll contribution.

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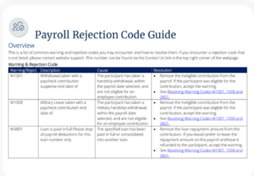
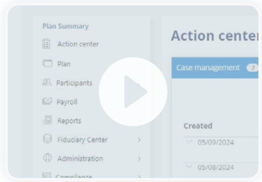
- When you click the *Complete transaction* button, the *Payroll submitted* confirmation will pop up.
- Once the payroll submission has been processed, you will receive an email confirmation from techsupport@retirementpartner.com.
- A confirmation summary will also be available in My Reports. We suggest saving this for your records. Please reach out to client services if you don't receive a confirmation summary.

Click *Continue* to return to the *Create and process payroll contributions* page.

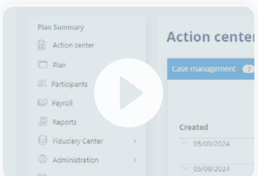
# Plan Management On-Demand resources



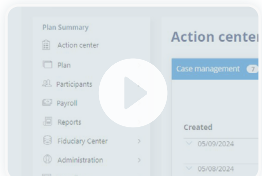

Payroll rejection resolution guide »



Entering payroll »



Banking changes »



Completing payroll »