

Website User Guide:

Manually Enter Contributions

Contents

PSW User Guide: Manually Enter Contributions	3
Log in to the Website	3
Choose Process Method	4
Select the Pay Period	5
Add Data	5
Add Participant - Add All	6
Add Participant - Add Existing.....	7
Add Participant - Add New	9
Edit Dollar Amounts	11
Delete an Employee	12
Save Payroll	14
Data Validation & Completion	16
Exit or Start Over	19
Fixes.....	19
Missing Payroll Period.....	19
Process an Incomplete Payroll Period	21
No Records Error	22
Clear an In Progress Payroll Period.....	23
Complete Button is Missing	25
Validation Complete with Errors (Blank Row Error)	27
Validation Complete with Warnings (Duplicate SSN Error)	30

PSW User Guide: Manually Enter Contributions

One of the Process Methods on the website is "Manually enter contributions." This is the most commonly used method of making contributions. Unless you are using an upload file, this is the process method required for first-time users. After you've made your first contribution, you may choose to use Copy information from a previous payroll period.

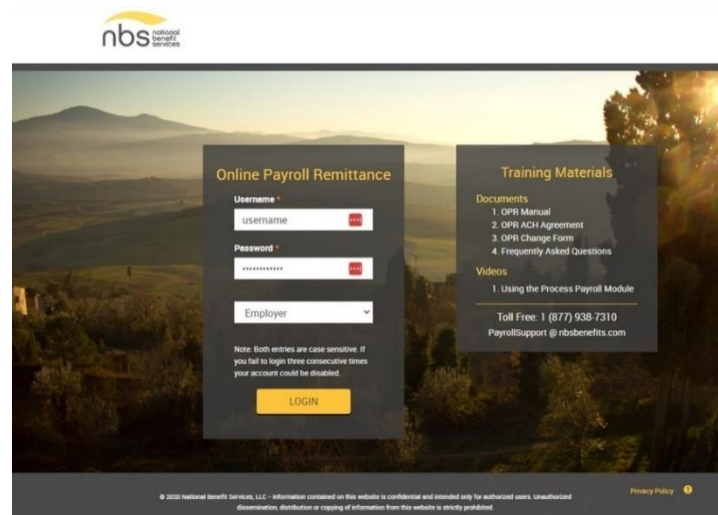
Log in to the Website

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

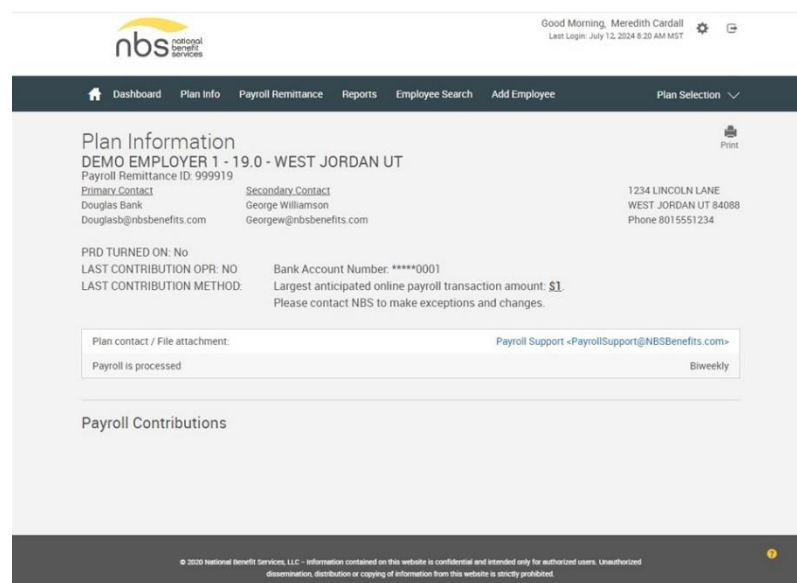
Enter your username and password.

Click "Login."

Verify your identity using Multi-factor authentication (MFA) if it's enabled for your plan.



The screenshot shows the login page for NBS Online Payroll Remittance. The page has a dark background with a landscape image. On the left, there is a login form with fields for Username, Password, and Employer. Below these fields is a 'LOGIN' button. To the right of the login form is a 'Training Materials' section with links to Documents and Videos. At the bottom, there is a footer with copyright information and a Privacy Policy link.



The screenshot shows the Plan Dashboard for a user named Meredith Cardall. The dashboard includes a navigation bar with links to Dashboard, Plan Info, Payroll Remittance, Reports, Employee Search, Add Employee, and Plan Selection. The main content area displays Plan Information for DEMO EMPLOYER 1 - 19.0 - WEST JORDAN UT, including contact details for Douglas Bank and George Williamson. It also shows the PRD status, last contribution OPR, and last contribution method. A section for Payroll Contributions is visible at the bottom.

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."

The screenshot shows the 'Plan Information' page for 'DEMO EMPLOYER 1'. The top navigation bar includes 'Dashboard', 'Plan Info', 'Payroll Remittance' (highlighted with a red box), 'Reports', 'Employee Search', 'Add Employee', and 'Plan Selection'. A dropdown menu for 'Payroll Remittance' is open, showing 'Process Payroll' (highlighted with a red box) and 'Contribution History'. The page content includes contact information for Douglas Bank and George Williamson, a 'Print' button, and a section for 'PRD TURNED ON: No', 'LAST CONTRIBUTION OPR: NO', and 'LAST CONTRIBUTION METHOD:'. A 'Bank Account Number: *****0001' and 'Largest anticipated online payroll transaction amount: \$1.' are also displayed. A 'Plan contact / File attachment:' field contains 'Payroll Support <PayrollSupport@NBSBenefits.com>' and a 'Payroll is processed' field contains 'Biweekly'.

Choose "Manually enter contributions."

Then, click "Next."

The screenshot shows the 'Online Payroll Remittance' page. The top navigation bar includes 'Home', 'Play', 'Play All', and 'Print'. The page content includes a 'Process selection' dropdown menu set to 'Payroll'. Under 'Process Method:', there are three radio button options: 'Upload a file', 'Manually enter contributions' (highlighted with a red box), and 'Copy information from a previous payroll period'. Below these is a tip: 'Tip: If you cannot find your needed payroll date, check in "Uncompleted and previous submissions" for payroll periods that show as incomplete.' A 'NEXT' button (highlighted with a red box) is located at the bottom right. A vertical sidebar on the right contains the text 'INSTRUCTIONS - Click to Expand'.

Select the Pay Period

The first step is to select a pay period.

Select Pay Period

Process format
Web Payroll (All Sou... DATA FORMAT

Select division
All PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Monthly 0	08-01-2024-08-31-2024	0	0
Default	Not started	Monthly 0	09-01-2024-09-30-2024	0	0
Default	Not started	Monthly 0	10-01-2024-10-31-2024	0	0
Default	Not started	Monthly 0	11-01-2024-11-30-2024	0	0

START OVER BACK NEXT

INSTRUCTIONS - Click to Expand

In the 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.

Then, click "Next."

If you don't see the

payroll period you want to use, see: [Fixes: Missing Payroll Period](#).

Add Data

The page that loads will have a toolbar as well as an empty box. This is what you want to see at this point. The next step is to add data to this payroll period.

Home

Data Validation Center

Overall Progress: **33% Complete**

Edit Data

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

Payroll period: 08/01/2024 - 08/31/2024

File(s)
All Files CLEAR FILTERS

New	Status	Social Security Number	Name - Last	Name - First	SIMPLE IRA
-----	--------	------------------------	-------------	--------------	------------

0.00

Page 0 of 0 30 items per page

Severity Error

INSTRUCTIONS - Click to Expand

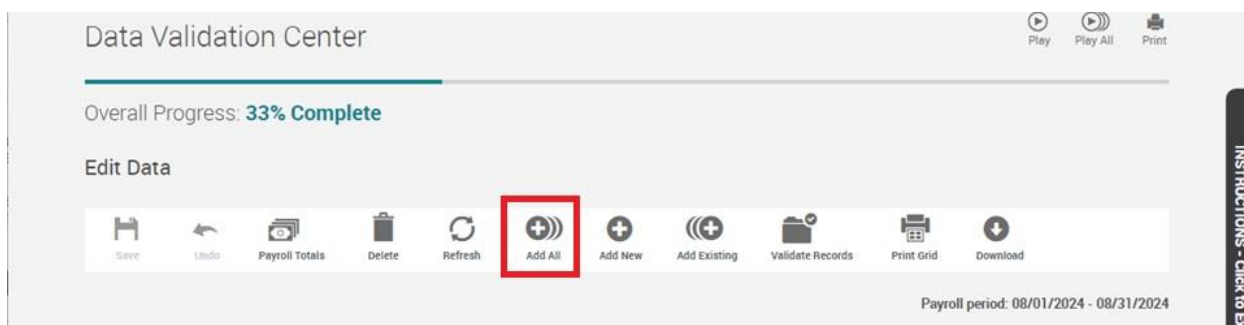
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The first step is to add the participants to the payroll period. There are three options for adding participants to the payroll period. You can [“Add All,”](#) [“Add Existing,”](#) or [“Add New.”](#) Add All allows you to add all the participants who have ever been a part of your plan. Add Existing allows you to choose from a list of all your plan participants. Add New allows you to add a new participant to your plan.

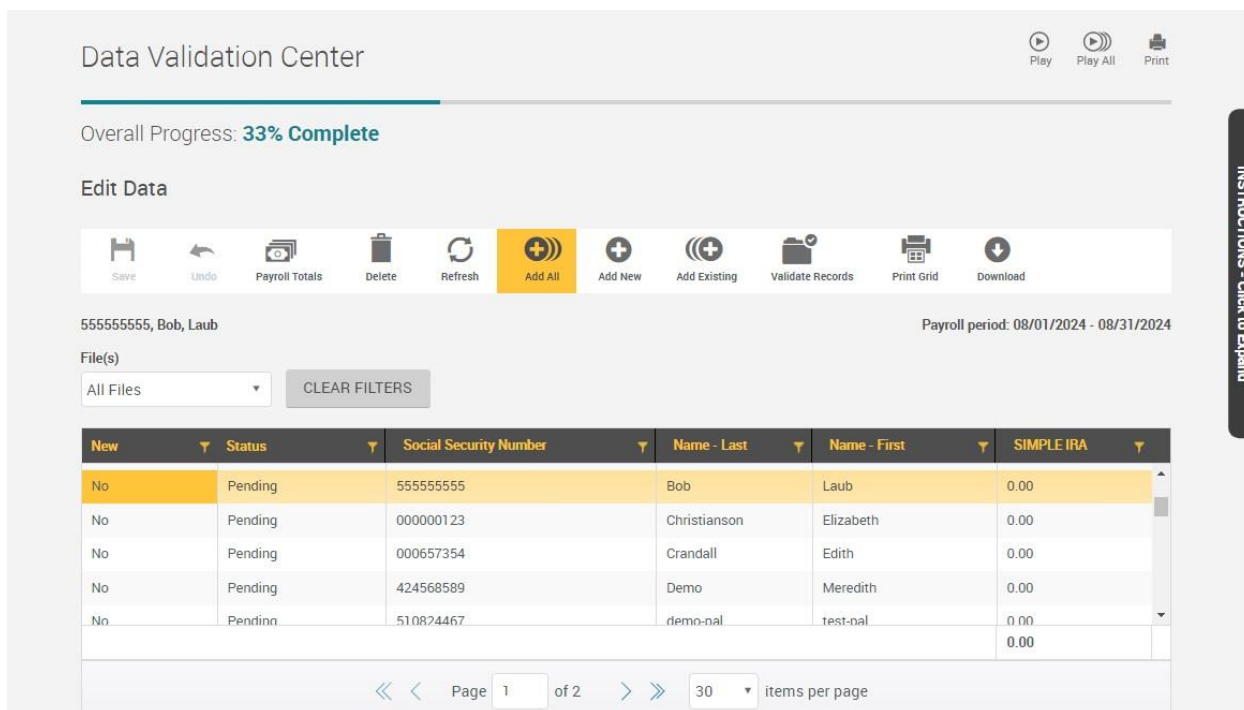
Add Participant - Add All

The “Add All” button adds all the participants who have ever been a part of your plan to your payroll period.

On the toolbar, click on the “Add All” button.



The screenshot shows the 'Data Validation Center' interface. At the top, there's a progress bar indicating 'Overall Progress: 33% Complete'. Below this is the 'Edit Data' section with a toolbar containing several icons: Save, Undo, Payroll Totals, Delete, Refresh, Add All (highlighted with a red box), Add New, Add Existing, Validate Records, Print Grid, and Download. The 'Payroll period: 08/01/2024 - 08/31/2024' is displayed at the bottom right of the toolbar area. A vertical sidebar on the right contains the text 'INSTRUCTIONS - Click to Expand'.



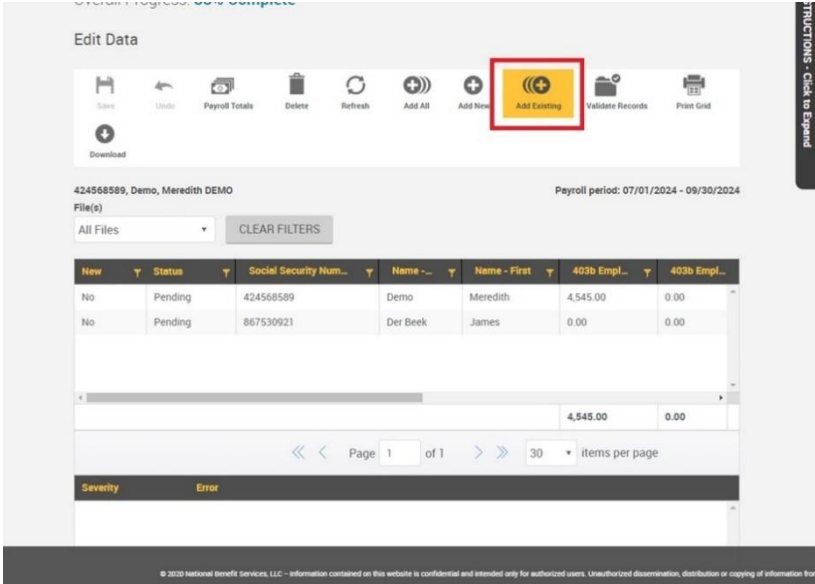
This screenshot shows the 'Data Validation Center' with the 'Add All' button highlighted in the toolbar. Below the toolbar, the text '55555555, Bob, Laub' is displayed. The 'Payroll period: 08/01/2024 - 08/31/2024' is also shown. A 'File(s)' dropdown menu is set to 'All Files', and a 'CLEAR FILTERS' button is present. A table lists participants with columns for 'New', 'Status', 'Social Security Number', 'Name - Last', 'Name - First', and 'SIMPLE IRA'. The table contains five rows of data, with the first row highlighted in yellow. At the bottom, there's a pagination control showing 'Page 1 of 2' and '30 items per page'. A vertical sidebar on the right contains the text 'INSTRUCTIONS - Click to Expand'.

New	Status	Social Security Number	Name - Last	Name - First	SIMPLE IRA
No	Pending	55555555	Bob	Laub	0.00
No	Pending	000000123	Christianson	Elizabeth	0.00
No	Pending	000657354	Crandall	Edith	0.00
No	Pending	424568589	Demo	Meredith	0.00
No	Pending	510824467	demo-nal	test-nal	0.00

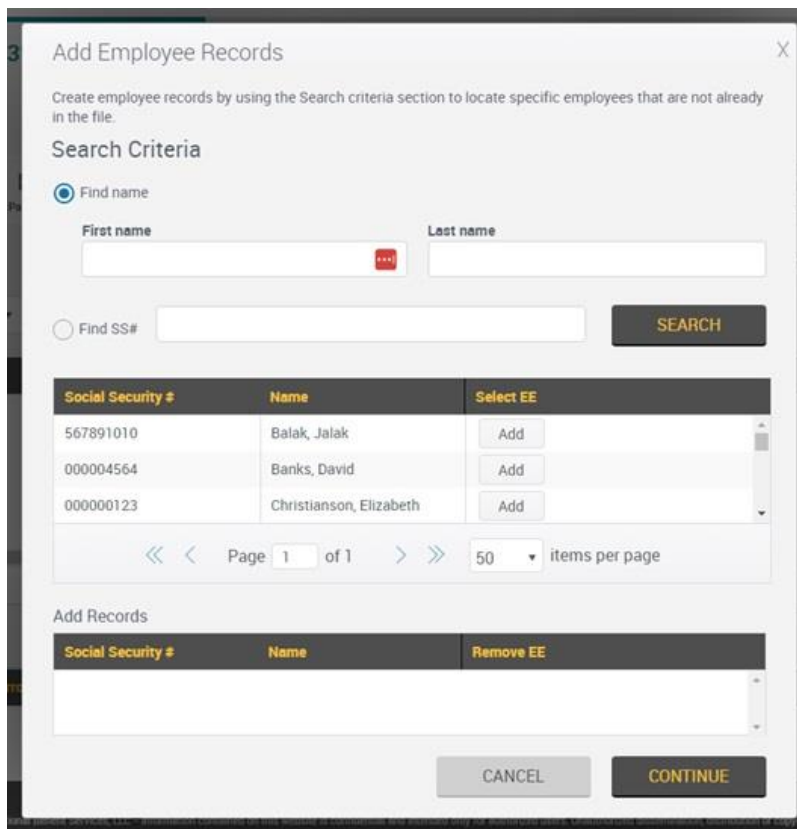
The participants are now on the participant list and are ready to have their contributions added. See: [Edit Dollar Amounts.](#) If you would like to delete anyone from this payroll period, see: [Delete an Employee.](#)

Add Participant - Add Existing

The "Add Existing" option allows you to select and add certain participants to your payroll period. This may be helpful if you have a large number of participants in your plan but only want to make contributions for a small number of participants. If you accidentally [deleted a participant](#) from your payroll period, but need to add them again, you would use this option. On the toolbar, click on the "Add Existing" button.



The screenshot shows the 'Edit Data' interface. In the top toolbar, the 'Add Existing' button (represented by a plus sign and a double arrow) is highlighted with a red box. Below the toolbar, the 'Payroll period' is set to 07/01/2024 - 09/30/2024. A table lists participants with columns for New, Status, Social Security Num., Name, Name - First, 403b Empl., and 403b Empl.. The table shows two participants: Meredith Demo and James Der Beek. At the bottom, there are pagination controls showing Page 1 of 1 and 30 items per page.



The 'Add Employee Records' dialog box is shown. It has a 'Search Criteria' section with two radio buttons: 'Find name' (selected) and 'Find SS#'. Below 'Find name' are input fields for 'First name' and 'Last name'. Below 'Find SS#' is an input field for 'Social Security #'. A 'SEARCH' button is to the right of the 'Find SS#' field. Below the search fields is a table with columns 'Social Security #', 'Name', and 'Select EE'. The table lists three participants: Balak, Jalak; Banks, David; and Christianson, Elizabeth. Each row has an 'Add' button in the 'Select EE' column. Below the table are pagination controls showing Page 1 of 1 and 50 items per page. At the bottom of the dialog are 'CANCEL' and 'CONTINUE' buttons.

You can search by a 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.

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. See: [Edit Dollar Amounts](#).

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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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."

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...
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

Page 1 of 1 30 items per page

Severity Error

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.

Edit Data

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

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

Page 1 of 1 30 items per page

Severity Error

Edit Dollar Amounts

Overview Progress: 100% Complete

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

4,995.00 0.00

Page 1 of 1 30 items per page

Severity Error

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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.

Overview Progress: 100% Complete

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

4,995.00 0.00

Page 1 of 1 30 items per page

Severity Error

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Delete an Employee

You may wish to delete an employee who is no longer participating in your retirement plan or simply isn't making contributions this payroll period. They will stay in your Employee List at NBS forever, but you don't have to keep them in your payroll list for this payroll period. You can delete the participant from this payroll period. Next time you're processing, choose "Copy from previous pay period" as your process method. You'll start with a fully editable payroll period, based on a previously processed payroll period.

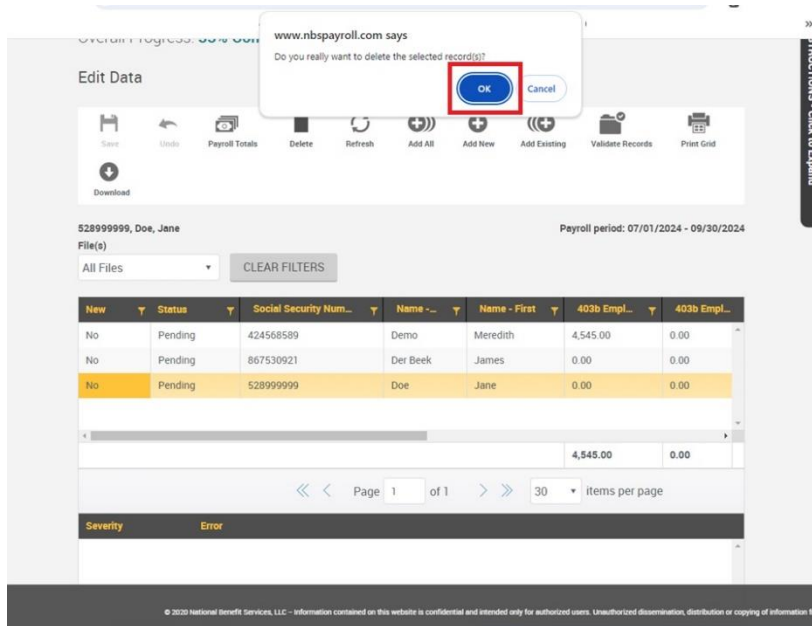
Click on the participant(s) who you would like to remove from your payroll period. Don't worry! If you accidentally remove someone, you can always [add them back](#). The participant is selected when their row is highlighted yellow.

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

The screenshot shows the 'Edit Data' interface for a payroll period of 07/01/2024 - 09/30/2024. The toolbar at the top includes buttons for Save, Undo, Payroll Totals, Delete (highlighted with a red box and '2'), Refresh, Add All, Add New, Add Existing, Validate Records, and Print Grid. Below the toolbar, the employee list is displayed with columns: New, Status, Social Security Num..., Name - ..., Name - First, 403b Empl..., and 403b Empl... The row for Jane Doe (Social Security Number 528999999) is highlighted in yellow and marked with a red '1'. The bottom of the screen shows a footer with copyright information for National Benefit Services, LLC.

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

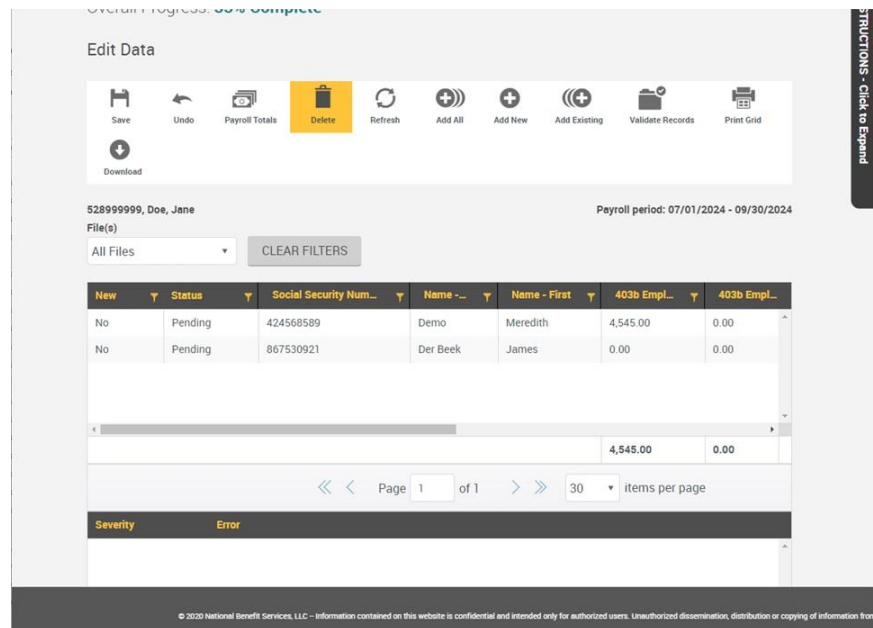
When you have deleted the participant(s) and your list is ready, see: [Edit Dollar Amounts](#).



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 payroll period.

Click "OK" to delete the participant.

The participant no longer appears in this payroll period.



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. At the top, there is a toolbar with several icons. The 'Save' icon, which is a floppy disk, is highlighted with a red box. Below the toolbar, there is a 'Download' button. The main area displays a table of employee data for the payroll period 07/01/2024 - 09/30/2024. The table has columns for 'New', 'Status', 'Social Security Num...', 'Name - ...', 'Name - First', '403b Empl...', and '403b Empl...'. The second row, for Edith Crandall, is highlighted in yellow, and the value '25.00' in the '403b Empl...' column is also highlighted with a red box. A red triangle icon is visible next to this value. The table footer shows a total of 4,995.00 and 0.00. A 'Page 1 of 1' indicator and a '30 items per page' dropdown are also visible.

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 'Data Validation Center' popup dialog box. The dialog has a title bar 'Data Validation Center' and a close button (X). The main text asks 'Are you sure you want to save all changes?'. There are two buttons: 'CANCEL' and 'SAVE/CONTINUE'. The 'SAVE/CONTINUE' button is highlighted with a red box. The background shows the same 'Edit Data' interface as the previous screenshot, but it is dimmed.

Overlaid Progress: 100% 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	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

Instructions - Click to Expand

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.

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

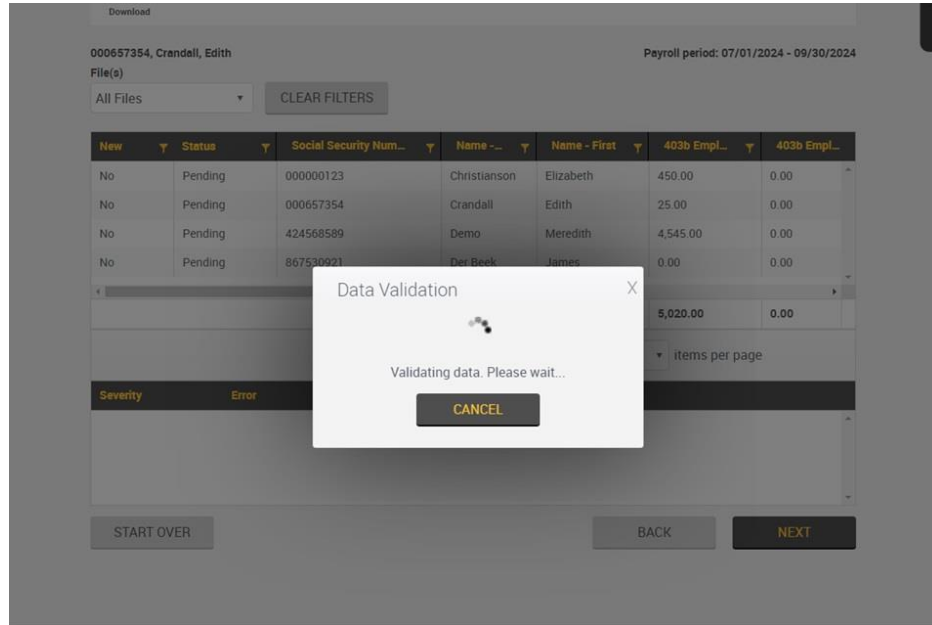
Page 1 of 1 30 items per page

Severity Error

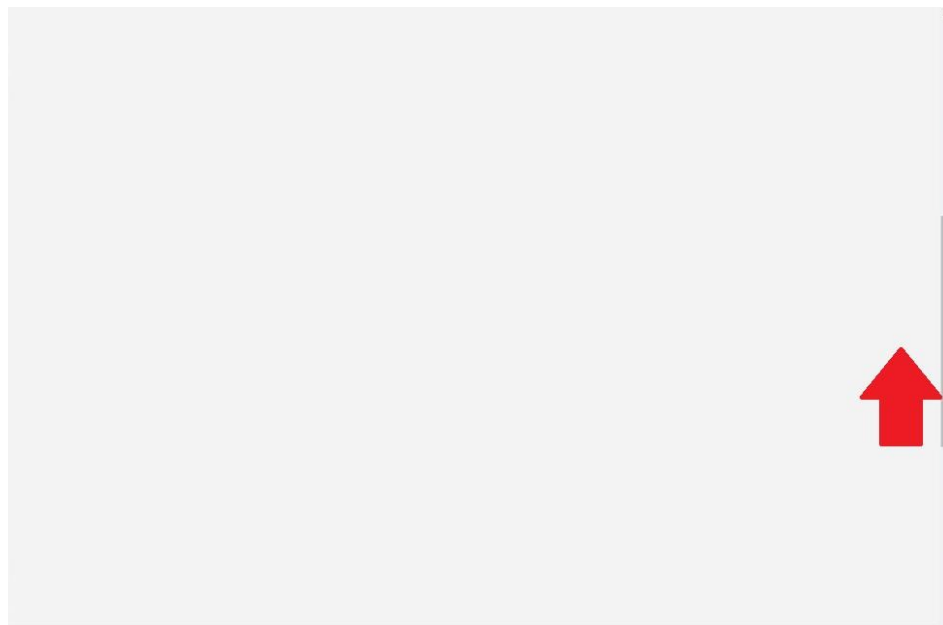
START OVER
BACK
NEXT

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.



Home

Data Validation Center

Overall Progress: **67% Complete**

Totals / Funding

Payroll Totals

Submit for final processing

Funding/Deposit Information

PRINT GRID

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

Method of funding

Select a funding meth...

START OVER

BACK

COMPLETE

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

If the Total Payroll Deposit amount is incorrect, click the "Back" button to go back to the [Edit Data](#) page to make sure you have the correct participants and dollar

amounts added.

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 payroll period deleted, call us at 877-938-7310 to see if we can delete your transaction. If the payroll period has already been submitted, we will not be able to delete the transaction.

Home

Data Validation Center

Overall Progress: **67% Complete**

Totals / Funding

Payroll Totals

Submit for final processing

Funding/Deposit Information

PRINT GRID

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

Method of funding

ACH Pull

START OVER

BACK

COMPLETE

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Once your transaction is "Complete" a Confirm/Import page will load. If you would like a confirmation page, 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.

Play

Play All

Print

Data Validation Center

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

Total Payroll Deposit

\$5,020.00

Funding Instructions

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

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
Total Payroll Deposit	\$5,020.00

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.

Fixes

Missing Payroll Period

If you're missing a payroll period when you choose either the "Manually enter contributions" or "Copy information from a previous payroll period" process method, you'll need to click the "Back" button that is built into the website (not your browser's back button).

Home

Data Validation Center

Overall Progress: 0% Complete

Select Pay Period

Process format
Web Payroll (SIMPLE) DATA FORMAT

Select division
All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Not started	Monthly 0	11-01-2024-11-30-2024	0	0
Default	Not started	Monthly 0	12-01-2024-12-31-2024	0	0

START OVER **BACK** NEXT

Online Payroll Remittance

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

Choose
"Uncompleted
and previous
submissions"
from the list of
Process
Methods.

Do you see your
payroll period?
Check the Status
Column. If your
payroll period
status is
"Incomplete" and
there is a
number other
than "0" in the
Participants
column, you can
select your
payroll period

Data Validation Center

Overall Progress: 0% Complete

Select Pay Period

Select division
All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
» Default	Incomplete	Monthly 0	09-01-2024-09-30-2024	2	0
» Default	Incomplete	Monthly 0	10-01-2024-10-31-2024	2	0

START OVER BACK NEXT

INSTRUCTIONS - Click to Expand

and click "Next" to continue processing. See: [Fixes: Process an Incomplete Payroll Period](#).

If your status is "Incomplete" but your participants count is "0," see: [Fixes: No Records Error](#).

If your status is "Complete" then your payroll period has already been submitted. See: [Fixes: Complete Button is Missing](#).

Process an Incomplete Payroll Period

In the “Uncompleted and previous submissions” process method area, locate your Incomplete payroll period, click it to select it, then click the “Next” button.

You can edit your payroll period, just like when you originally worked on your payroll period. You can add or delete participants, and you can edit dollar amounts. See: [Add Data](#).

When everything is correct, click the “Next” button to continue.

Data Validation Center

Overall Progress: **0% Complete**

Select Pay Period

Select division: All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Monthly 0	09-01-2024-09-30-2024	2	0
Default	Incomplete	Monthly 0	10-01-2024-10-31-2024	2	0

START OVER BACK NEXT

INSTRUCTIONS - click to Expand

Edit Data

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

000329898, Georgeson, William Payroll period: 12/01/2024 - 12/31/2024

File(s): All Files CLEAR FILTERS

New	Status	Social Security Number	Name - Last	Name - First	SIMPLE IRA
No	Pending	000329898	Georgeson	William	20.00
No	Pending	123454321	Mouse	Mickey	20.00
					40.00

Page 1 of 1 30 items per page

Severity Error

START OVER BACK NEXT

See: [Data Validation & Completion](#) for the remaining steps to complete your payroll period.

No Records Error

In the “Uncompleted and previous submissions” process method area, locate your Incomplete payroll period, click it to select it, then click the “Next” button.

Data Validation Center

Overall Progress: **0% Complete**

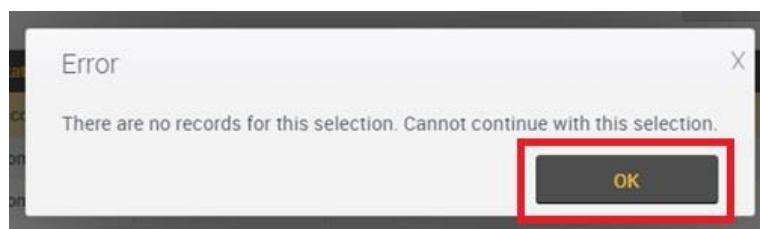
Select Pay Period

Select division: All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Monthly 0	11-01-2024-11-30-2024	0	0
▶ Default	Completed	Monthly 0	09-01-2024-09-30-2024	2	0
▶ Default	Completed	Monthly 0	10-01-2024-10-31-2024	3	0

INSTRUCTIONS - click to Expand



You may get this error. Click the “OK” button.

Take a closer look at the payroll period. The status is “Incomplete” but the number in the Participants column is “0.” That means that the payroll period was opened and closed without any data being added to it. The payroll period is void.

Data Validation Center

Overall Progress: **0% Complete**

Select Pay Period

Select division: All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Monthly 0	11-01-2024-11-30-2024	0	0
▶ Default	Completed	Monthly 0	09-01-2024-09-30-2024	2	0
▶ Default	Completed	Monthly 0	10-01-2024-10-31-2024	3	0

INSTRUCTIONS - click to Expand

The “Delete” button will not fix this payroll period.

Please email payrollsupport@nbsbenefits.com or call 877-938-7310 to request a new payroll period be added to your pay schedule.

Clear an In Progress Payroll Period

Once you’ve chosen the “Uncompleted and previous submissions” process method, you should see your missing payroll period in the list of payroll periods. The status should say “Incomplete.” Select the payroll period by clicking on the row. The row is selected when it’s highlighted yellow.

Home

Data Validation Center

Overall Progress: **0% Complete**

Select Pay Period

Select division: All

PRINT GRID DELETE

Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Monthly 0	09-01-2024-09-30-2024	2	0
Default	Incomplete	Monthly 0	10-01-2024-10-31-2024	2	0

START OVER BACK NEXT

INSTRUCTIONS - Click to Expand

Typically, you would click “Next” to continue processing. However, if you wish to completely clear out the payroll period and move it back to the “Manually enter contributions” or “Copy information from previous payroll period” process method, you can do that.

Home

Data Validation Center

Overall Progress: **0% Complete**

Select Pay Period

Select division: All

PRINT GRID DELETE

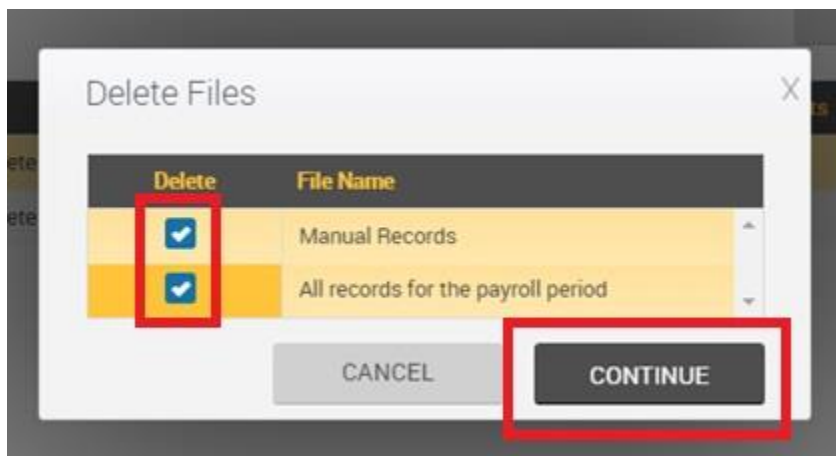
Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Monthly 0	09-01-2024-09-30-2024	2	0
Default	Incomplete	Monthly 0	10-01-2024-10-31-2024	2	0

START OVER BACK NEXT

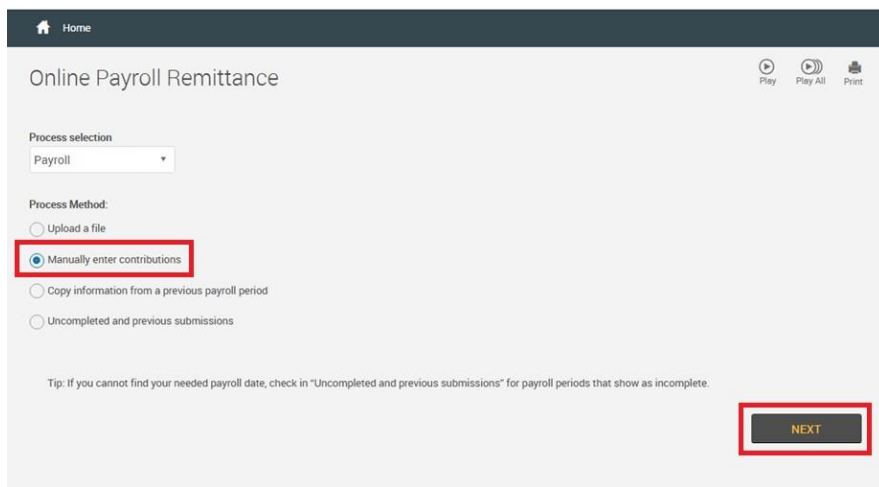
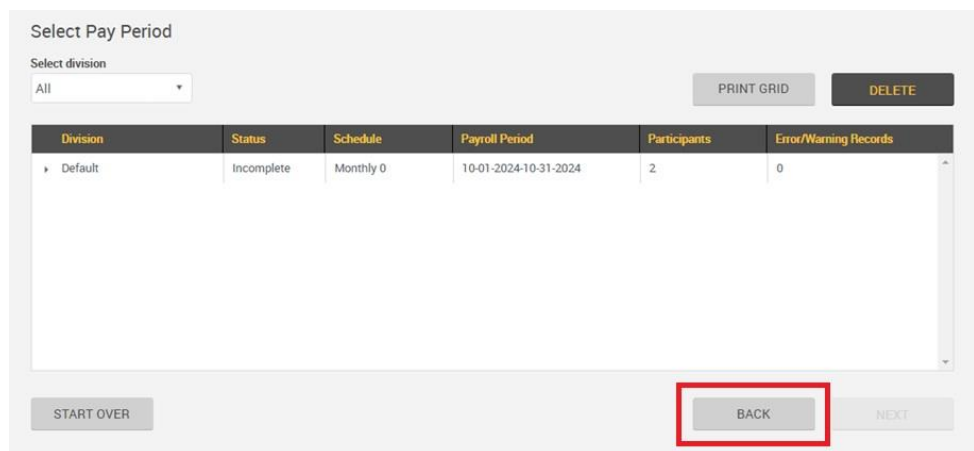
INSTRUCTIONS - Click to Expand

With your payroll period selected, click the “Delete” button.

In the popup, check all of the boxes, then click “Continue.”



The pay period is no longer in “Uncomplete & previous submissions.” Click the back button.



This takes you back to the page where you can select your process method. Typically, you’re going to want to use “Manually enter contributions” (but may want to use “Copy information from a previous payroll period”). Then click “Next.”

Choose the “Uncompleted and previous submissions” process method. Then click the “Next” button.

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

Locate your payroll period and check the status column. The status is most likely “Completed.”

Data Validation Center

Play

Play All

Print

Overall Progress: 0% Complete

Select Pay Period

Select division

All

PRINT GRID

DELETE

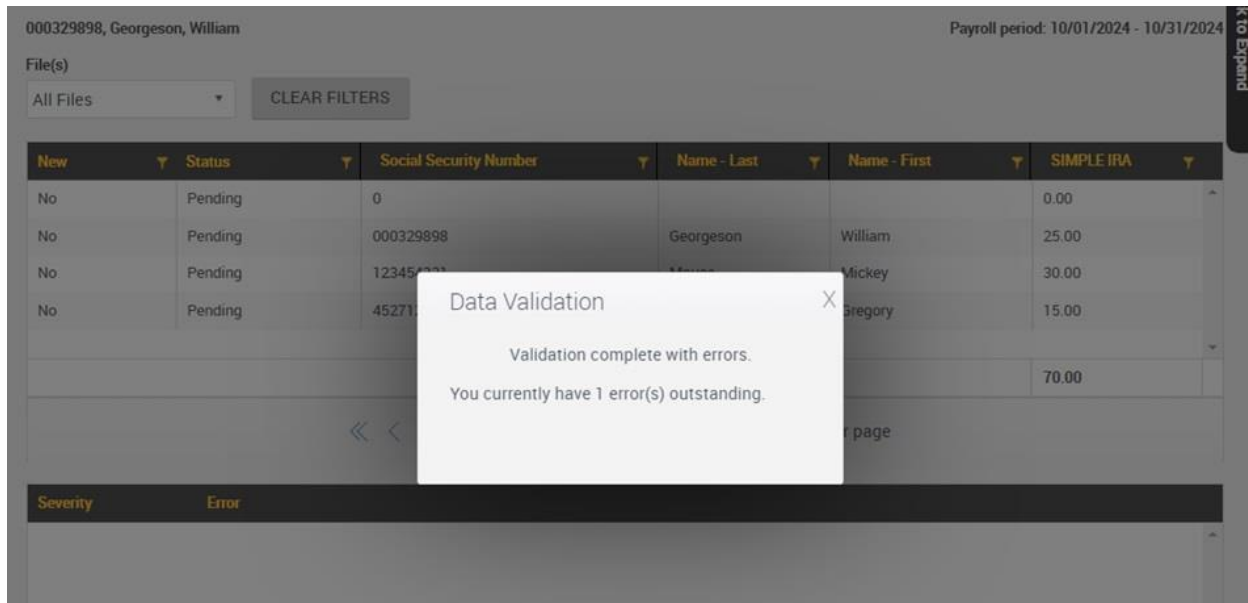
Division	Status	Schedule	Payroll Period	Participants	Error/Warning Records
Default	Incomplete	Monthly 0	11-01-2024-11-30-2024	0	0
▶ Default	Completed	Monthly 0	09-01-2024-09-30-2024	2	0
▶ Default	Completed	Monthly 0	10-01-2024-10-31-2024	3	0

INSTRUCTIONS - click to Expand

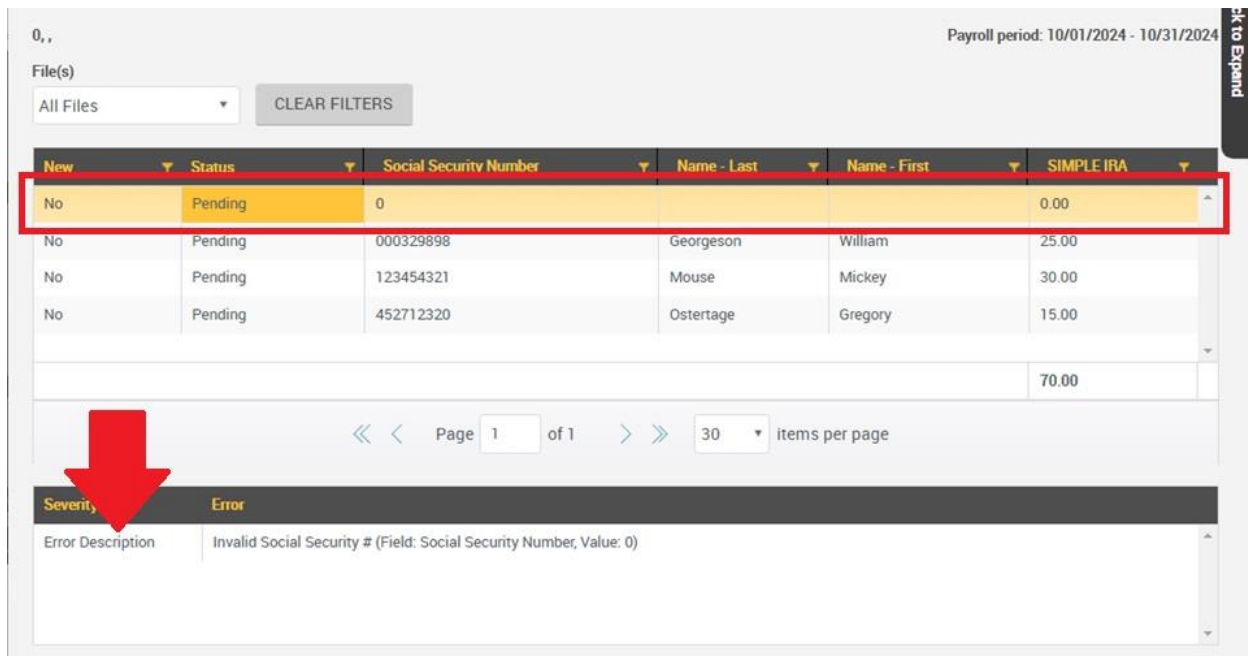
If you think this was completed in error, you can email payrollsupport@nbsbenefits.com or call 877-938-7310 for more information. You can also pull a report from the Reports section of the NBS portal to see when the payroll period was posted.

Validation Complete with Errors (Blank Row Error)

After you add your data and enter dollar amounts for your participants, click “Next” to validate your data. If this error comes up, “Validation complete with errors”, it means that you have a blank row somewhere in your data. Click the X to close the warning box.



Locate the blank row where you have a social security number of “0” and click the row to select it. It’s selected when it’s highlighted yellow. Below the box with your participants is a warning box. If you look at that box, it will tell you that there’s an error with the SSN. The error is that it’s a 0 because it’s not a real row of data.



With the row selected, click the “Delete” button in the toolbar above the participants box.

The screenshot shows the NBS Payroll system interface. The toolbar at the top includes buttons for Save, Undo, Payroll Totals, Delete (highlighted with a red box), Refresh, Add All, Add New, Add Existing, Validate Records, Print Grid, and Download. Below the toolbar, the payroll period is set to 10/01/2024 - 10/31/2024. A table of participants is displayed with columns: New, Status, Social Security Number, Name - Last, Name - First, and SIMPLE IRA. The first row is highlighted with a red box, showing a blank row with 'No' in the 'New' column, 'Pending' in the 'Status' column, and '0' in the 'Social Security Number' column. The total SIMPLE IRA amount is 70.00.

New	Status	Social Security Number	Name - Last	Name - First	SIMPLE IRA
No	Pending	0			0.00
No	Pending	000329898	Georgeson	William	25.00
No	Pending	123454321	Mouse	Mickey	30.00
No	Pending	452712320	Ostertage	Gregory	15.00
					70.00

Click the “OK” button to verify that you do want to delete the blank row.

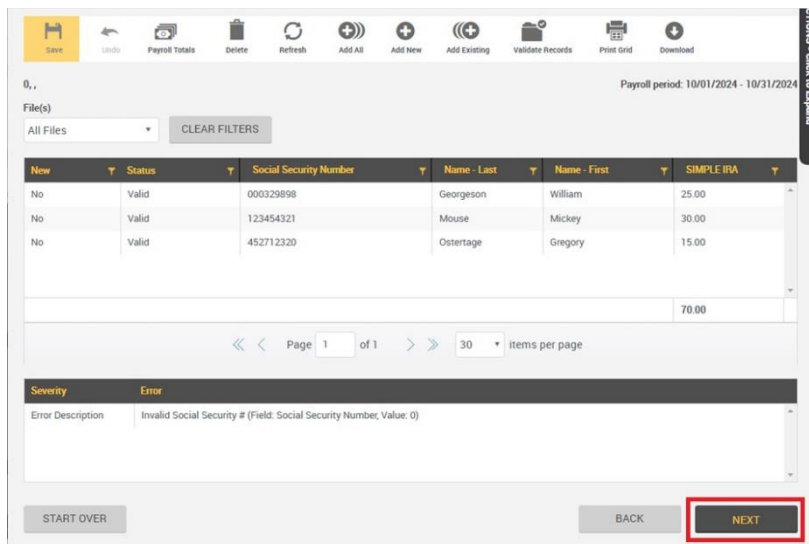
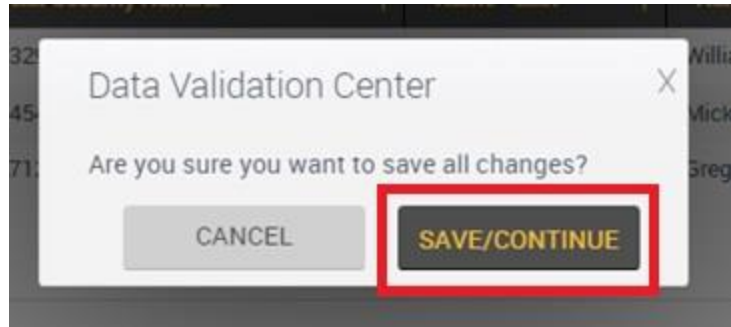
The screenshot shows a confirmation dialog box with the text: "www.nbspayroll.com says Do you really want to delete the selected record(s)?". The dialog box has two buttons: "OK" (highlighted with a red box) and "Cancel".

The screenshot shows the NBS Payroll system interface. The toolbar at the top includes buttons for Save (highlighted with a red box), Undo, Payroll Totals, Delete, Refresh, Add All, Add New, Add Existing, Validate Records, Print Grid, and Download. Below the toolbar, the payroll period is set to 10/01/2024 - 10/31/2024. A table of participants is displayed with columns: New, Status, Social Security Number, Name - Last, Name - First, and SIMPLE IRA. The first row is highlighted with a red box, showing a blank row with 'No' in the 'New' column, 'Pending' in the 'Status' column, and '0' in the 'Social Security Number' column. The total SIMPLE IRA amount is 70.00. At the bottom, an error message is displayed: "Invalid Social Security # (Field: Social Security Number, Value: 0)".

New	Status	Social Security Number	Name - Last	Name - First	SIMPLE IRA
No	Pending	0			0.00
No	Pending	000329898	Georgeson	William	25.00
No	Pending	123454321	Mouse	Mickey	30.00
No	Pending	452712320	Ostertage	Gregory	15.00
					70.00

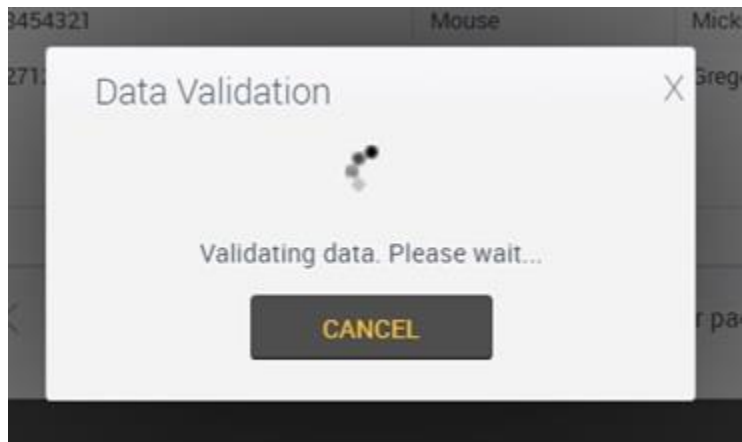
Click the “Save” button.

Click on the “Save/Continue” button to verify that you do want to save your changes.



When everything looks correct, click on the “Next” button.

You'll get a popup that it is validating your data.



If you cleaned up all the errors on your payroll, you will get to this page where you can select your method of funding and then complete your contribution for this payroll period. See: [Data Validation & Completion](#).

The screenshot shows the 'Data Validation Center' interface. At the top, there's a 'Home' button. Below it, the title 'Data Validation Center' is displayed. A progress bar indicates 'Overall Progress: 67% Complete'. The main section is titled 'Totals / Funding' and includes a 'Payroll Totals' section with a radio button for 'Submit for final processing'. To the right, there's a 'PRINT GRID' button. Below this is a table with the following data:

Division	Participants	New Participants	Total Payroll Deposit	SIMPLE IRA
Default	3	0	70	70
Totals	3	0	70	70

Below the table, there's a 'Method of funding' dropdown menu with the text 'Select a funding method'. At the bottom, there are three buttons: 'START OVER', 'BACK', and 'COMPLETE'. On the right side, there's a vertical sidebar with the text 'INSTRUCTIONS - Click to Expand'.

Validation Complete with Warnings (Duplicate SSN Error)

After you add your data and dollar amounts, and your data is validated, you may notice that there is a warning notice above the "Method of funding" dropdown. To correct the error, click the "Back" button that is built into the website to be taken back to the "Edit Data" screen.

This screenshot shows the 'Data Validation Center' interface with a warning message. The progress bar still indicates 'Overall Progress: 67% Complete'. The table data is as follows:

Division	Participants	New Participants	Total Payroll Deposit	SIMPLE IRA
Default	3	0	35	35
Totals	3	0	35	35

A red box highlights a warning message: 'You currently have 1 warning(s) outstanding.' Below this, the 'Method of funding' dropdown menu is visible. At the bottom, the 'BACK' button is highlighted with a red box, indicating the next step to correct the error.

Locate the row with "Warning" in the status column. Select the row to view the warning. The warning can be viewed in the error box below the participants box.

123454321, Mouse, Mickey Payroll period: 11/01/2024 - 11/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Number	Name - Last	Name - First	SIMPLE IRA
No	Valid	000329898	Georgeson	William	10.00
No	Valid	123454321	Mice	Mickey	10.00
No	Warning	123454321	Mouse	Mickey	10.00
No	Valid	452712320	Ostertage	Gregory	5.00
					35.00

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

Severity	Error
Warning	Duplicate Social security number

You should only have one row per participant. Please delete the row with the "Warning" status. Select the row, then click the "Delete" button in the toolbar.

Edit Data

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

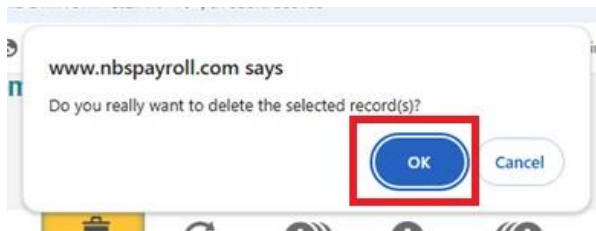
123454321, Mouse, Mickey Payroll period: 11/01/2024 - 11/30/2024

File(s) All Files CLEAR FILTERS

New	Status	Social Security Number	Name - Last	Name - First	SIMPLE IRA
No	Valid	000329898	Georgeson	William	10.00
No	Valid	123454321	Mice	Mickey	10.00
No	Warning	123454321	Mouse	Mickey	10.00
No	Valid	452712320	Ostertage	Gregory	5.00
					35.00

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

Severity	Error
Warning	Duplicate Social security number



Click "OK" to verify that you want to delete the selected record(s).

Verify that everything is correct. Do you need to add additional funds to replace the row you deleted? Once everything is correct, click the “Save” button on the toolbar.

INSTRUCTIONS - Click to Expand

Click on the “Save/Continue” button.

Click the “Next” button to validate the data.

If you cleared all the errors, you will be on the Verify & Complete step, without any errors.

See: [Data Validation & Completion](#) to finish processing your payroll.

The screenshot displays the 'Data Validation Center' interface. At the top, there are icons for 'Play', 'Play All', and 'Print'. Below this, a progress bar indicates 'Overall Progress: 67% Complete'. The main section is titled 'Totals / Funding' and contains two tabs: 'Payroll Totals' and 'Funding/Deposit Information'. The 'Payroll Totals' tab is active, showing a table with columns: 'Division', 'Participants', 'New Participants', 'Total Payroll Deposit', and 'SIMPLE IRA'. The table has two rows: 'Default' and 'Totals'. The 'Default' row shows 3 participants, 0 new participants, a total payroll deposit of 25, and a SIMPLE IRA of 25. The 'Totals' row shows the same values. Below the table, there is a 'Method of funding' dropdown menu with the text 'Select a funding meth...'. At the bottom, there are three buttons: 'START OVER', 'BACK', and 'COMPLETE'. On the right side of the interface, there is a vertical sidebar with the text 'INSTRUCTIONS - Click to Expand'.

Division	Participants	New Participants	Total Payroll Deposit	SIMPLE IRA
Default	3	0	25	25
Totals	3	0	25	25

If you have questions, or a different error, please email payrollsupport@nbsbenefits.com or call 877-938-7310.