



AMERICAN  
FUNDS®

From Capital Group

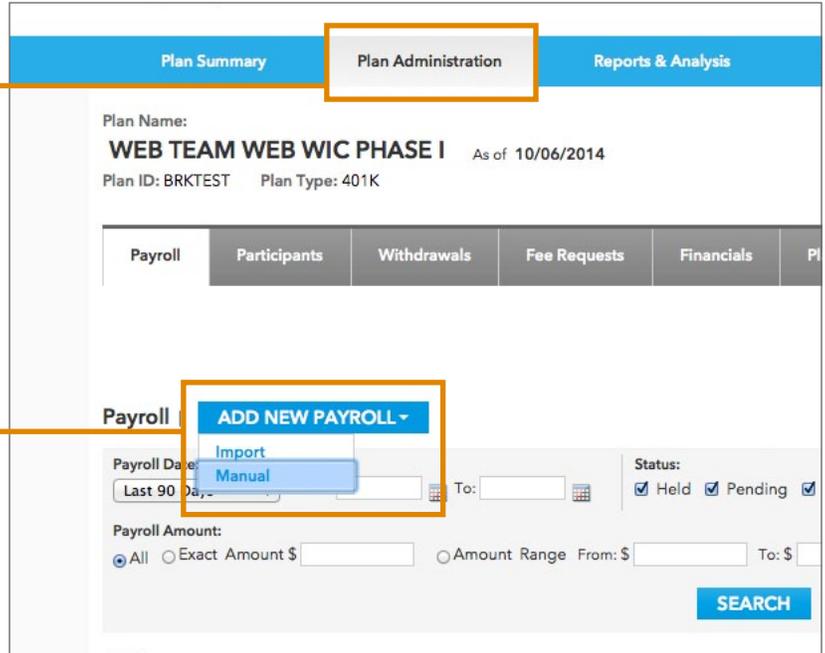
Multiple Perspectives. One Approach.®

## Manually Add a Payroll

American Funds Retirement Planning Center

### 1. Manually add a payroll

Click the **Plan Administration** tab. This takes you to the **Payroll** section.

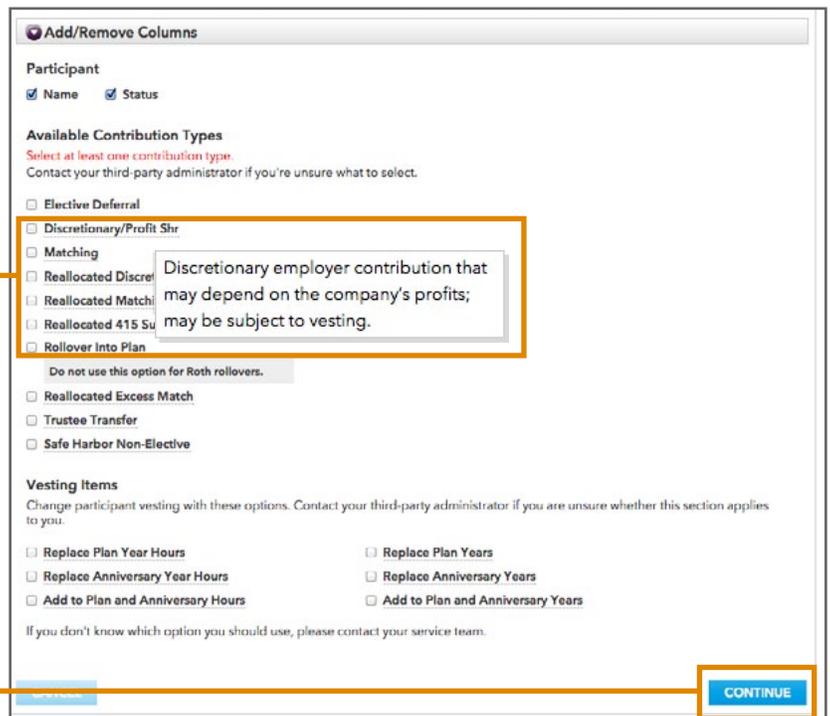


Click **Add New Payroll** to select **Manual**.

### 2. Select criteria

Select participant status and contribution types, such as elective deferral or matching.

*Note: Not sure what to select? You can view a definition of each contribution type by hovering over the text with your cursor. (A dotted line indicates that a definition is available.) Or, contact your third-party administrator for assistance.*



When finished, click **Continue**.

### 3. Update payroll, if necessary

Choose a payroll date, and enter the amount for each participant's contribution type.

*Note: The payroll date determines when money will be transferred if you're using a current or upcoming date. (If you're using a date in the past, the money will be transferred the following business day.) Select a date in the future to set up a payment in advance. Contributions for payrolls transmitted using the current date:*

- Before 4 p.m. (EST) will be transferred at the close of the current business day.
- After 4 p.m. (EST) or on a weekend or holiday will be transferred at the close of the next business day.

**Add a New Payroll**

1 Select criteria

Payroll Date:

Payment Type:  ACH  Check  Wire

2 Make your edits

3 Fund your payroll

4 Verify and submit your changes

Add/Remove Columns    Sort By:     Filter:

SSN	Name	Status
<input type="checkbox"/> xxx-xx-1234	Participant1, Plan	Terminated
<input type="checkbox"/> xxx-xx-1235	Participant2, Plan	Active
<input type="checkbox"/> xxx-xx-1236	Participant3, Plan	Terminated
<input type="checkbox"/> xxx-xx-1237	Participant4, Plan	Active
<input type="checkbox"/> xxx-xx-1238	Participant5, Plan	Active
<input type="checkbox"/> xxx-xx-8745	Hatter, Lucy	Active
<input type="checkbox"/> xxx-xx-8565	Hightree, Shelly	Active

Enter your dollar amounts in the appropriate columns.

To add participants, click **Add Participants to List**. To remove participants from the payroll list, check the box next to their Social Security Number and click **Delete Selected Participants**.

To add a contribution type, click **Add/Remove Columns** and make your selections.

When finished, click **Continue**.

*Note: Click **Save and Continue Later** to complete this task at another time. Your payroll will be saved with an In Progress status.*

**Add a New Payroll** Need Help?

1 Select criteria

Payroll Date:

Payment Type:  ACH  Check  Wire

2 Make your edits

3 Fund your payroll

4 Verify and submit your changes

Add/Remove Columns    Sort By:     Filter:     [Printer-friendly version](#)

SSN	Name	Status	Total
<input type="checkbox"/> xxx-xx-1234	Participant1, Plan	Terminated	\$0.00
<input type="checkbox"/> xxx-xx-1235	Participant2, Plan	Active	\$0.00
<input type="checkbox"/> xxx-xx-1236	Participant3, Plan	Terminated	\$0.00
<input type="checkbox"/> xxx-xx-1237	Participant4, Plan	Active	\$0.00
<input type="checkbox"/> xxx-xx-1238	Participant5, Plan	Active	\$0.00
<input type="checkbox"/> xxx-xx-8745	Hatter, Lucy	Active	\$0.00
<input type="checkbox"/> xxx-xx-8565	Hightree, Shelly	Active	\$0.00
<input type="checkbox"/> xxx-xx-7854	Green, Levi	Active	\$0.00

[Delete Selected Participants](#) | [Add Participants to List](#)

Payroll Totals: \$0.00

### 4. Fund payroll

Enter the funding amount to be withdrawn via ACH from your bank account(s).

To offset any employer contributions using forfeiture assets, enter the funding amount in the **Forfeiture Accounts** section.

Check the dollar amounts to confirm that the amount you need to fund matches the amount you have funded.

When finished, click **Continue**.

**Add a New Payroll** Need Help?

1 Select criteria You need to fund \$7.00  
 2 Make your edits You have funded \$7.00

3 Fund your payroll

Bank Accounts  
 Fund your payroll using any combination of the bank accounts listed below.

Plan Bank Account (* indicates the default) BRKTEST	Description: TEST ACCT				
Reg 1	Reg 2	Account Type	Account Number	Routin Number	Funding Amount
*WEB TEAM WIC TEST PLAN	Checking	*****0578	1210-0024-8		\$ 7.00

Accounts Totals: \$7.00

Forfeiture Accounts  
 To fund some or all of your payroll using a forfeiture account, enter the funding amount(s) below.  
 Important: Forfeiture accounts cannot be used to fund employee elective deferrals and Roth elective deferrals.  
 Forfeiture accounts (unless they are invested in cash-equivalent investments) are subject to market fluctuations; therefore, the entire balance may not be available when your payroll is processed.

Affiliate / Account Name	Fund Name	Account Number	Available Amount	Funding Amount
Web Team Test Plan				
Discretionary	American Funds Money Market Fund R2	*****5011	\$16,243.09	\$ 0.00
Employee Matching	American Funds Money Market Fund R2	*****5011	\$424.23	\$ 0.00

Forfeiture Totals: \$0.00

**You need to fund \$7.00** **You have funded \$7.00**

### 5. Verify changes

Review the payroll information for accuracy. To make any changes, click the numbered step indicator for the section you'd like to update.

*Note: You may need to re-enter some information when you go back to a prior step.*

To receive an email notification when this payroll is submitted, enter your email address.

When finished, click **Submit**.

**Add a New Payroll**

1 Select criteria  
 2 Make your edits  
 3 Fund your payroll  
 4 Verify and submit your changes

**Verify that the payroll information below is correct.**  
 Contributions for payrolls submitted after 4 p.m. (ET) will be transferred on the fol  
 Verify your payroll is accurate. If any changes are needed, click **Back** to edit your  
 Payroll Date: 11/19/2014 Payment Type: ACH

**Contributions**

**Contribution Type**

- Elective Deferral
- Discretionary/Profit Shr
- Matching
- Reallocated Discretionary

**Vesting Items**

**Plan Hours**

