AMERICAN FUNDS®

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View, Edit, Copy or Delete a Payroll

American Funds Retirement Planning Center

View or Edit an Existing Payroll

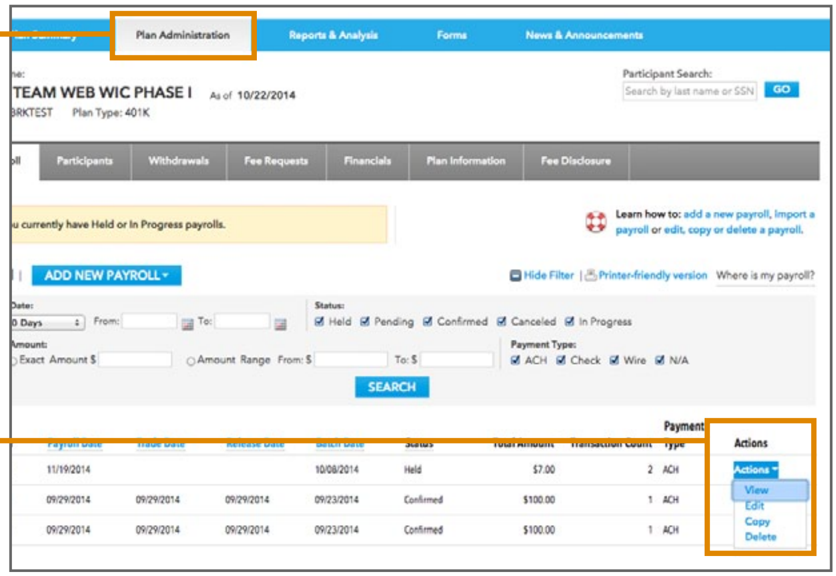
Start here to learn how to view or edit an existing payroll. Or skip to the **Copy an Existing Payroll** (p.5) section or the **Delete a Payroll** (p.6) section.

1. View or edit a payroll

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

Find the payroll, and then click the Actions drop-down menu to select **View** to view your payroll or **Edit** to make changes.

Note: Payrolls in a Held or In Progress status can be viewed or edited. Payrolls in other statuses can only be viewed.



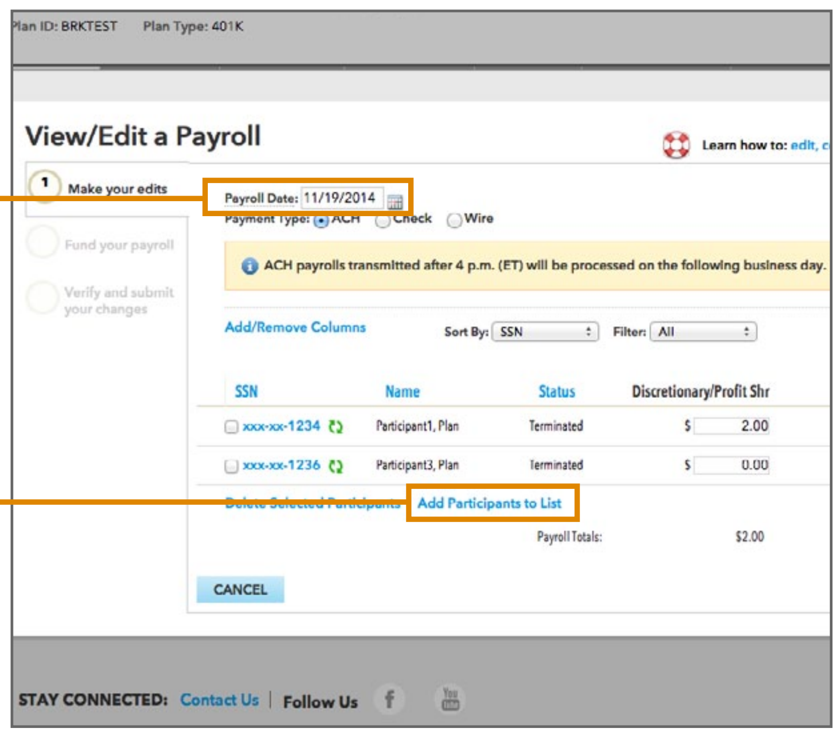
2. Edit payroll, if necessary

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

Note: 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.*

To add participants, click **Add Participants to List**.

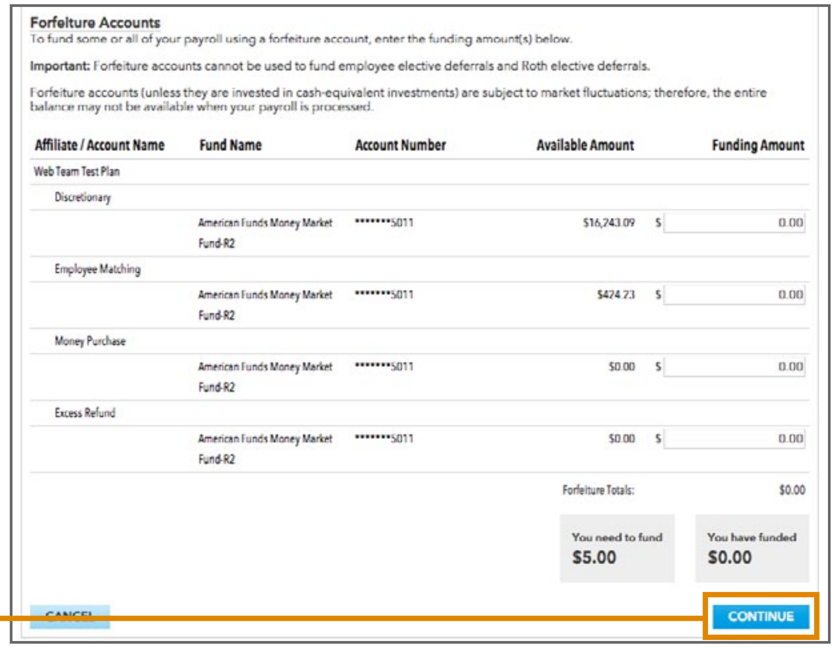


To remove participants from the payroll list, check the boxes next to their Social Security Number and click **Delete Selected Participants**.

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.



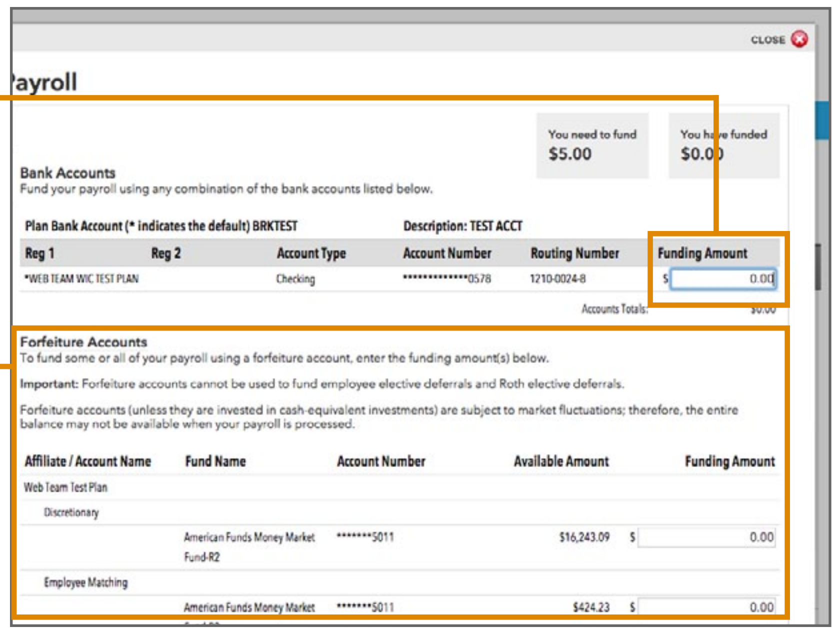
3. Fund payroll

Enter the funding amount to be withdrawn via ACH from your bank account(s).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



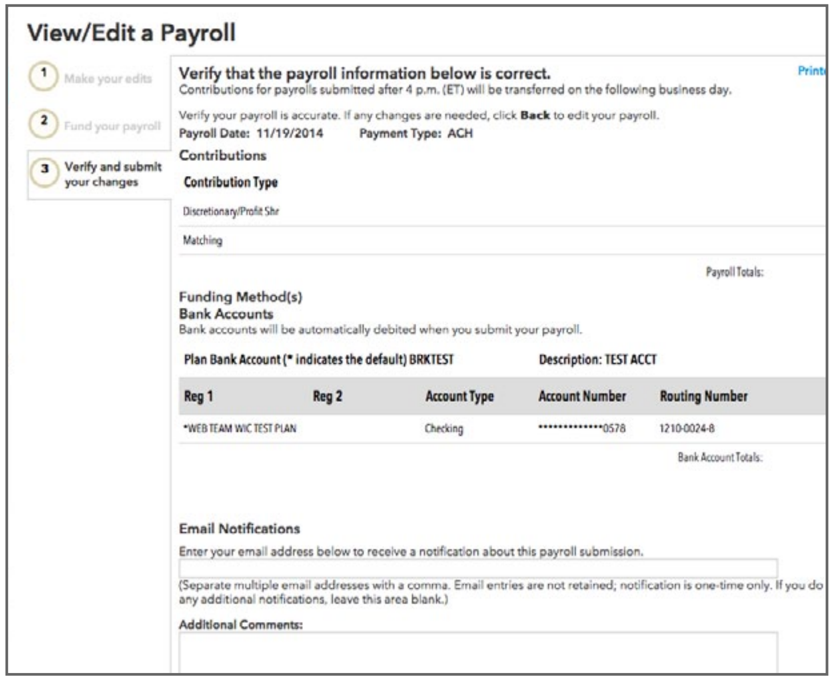
4. Verify changes

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

Note: Some information may need to be re-entered when you go back to a prior step.

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

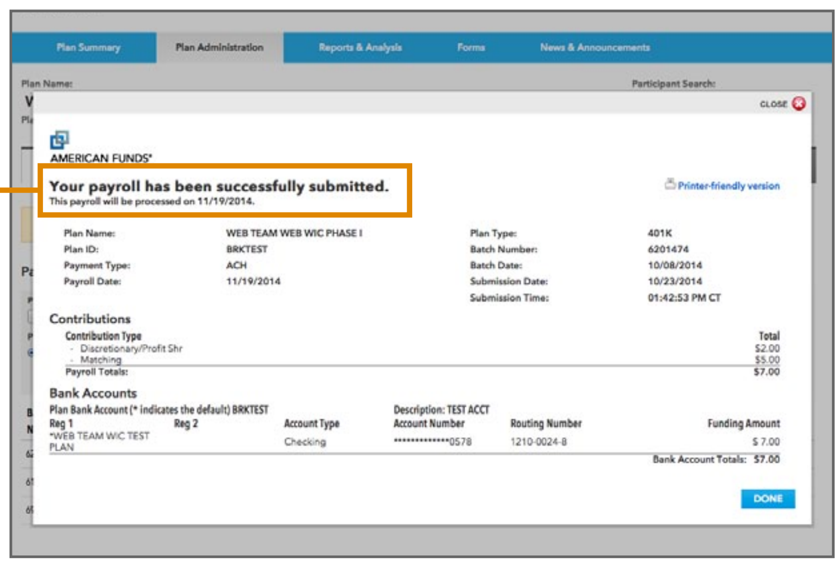
When finished, click **Submit**.



5. Confirmation of success

You will see a confirmation page stating that your payroll changes have been submitted.

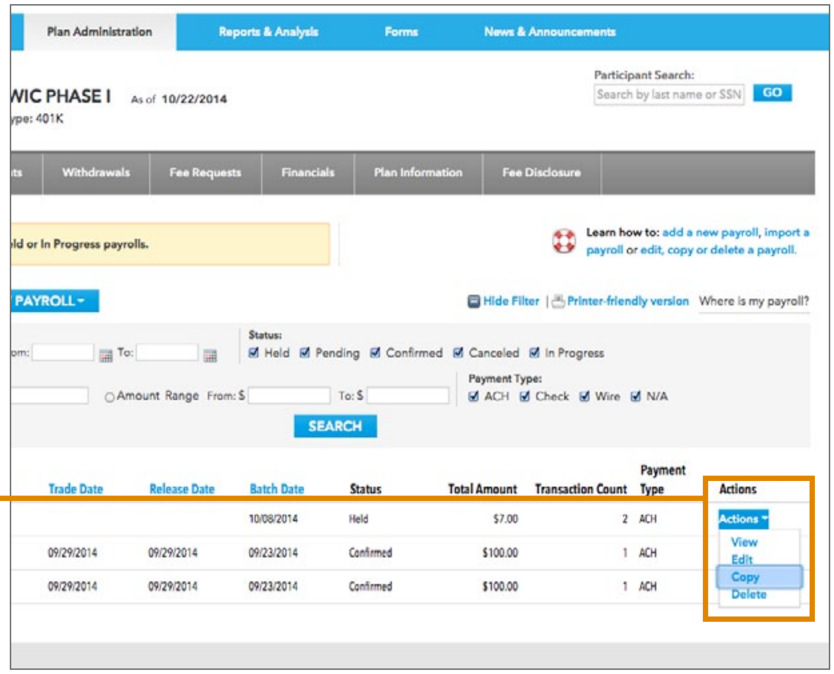
To see the status, close the confirmation page, then find the batch number in the list below.



Copy an Existing Payroll

1. Copy a payroll

To model an existing payroll, click the Actions drop-down menu and select **Copy**.



Follow the update payroll steps above.

When finished, click **Submit**.

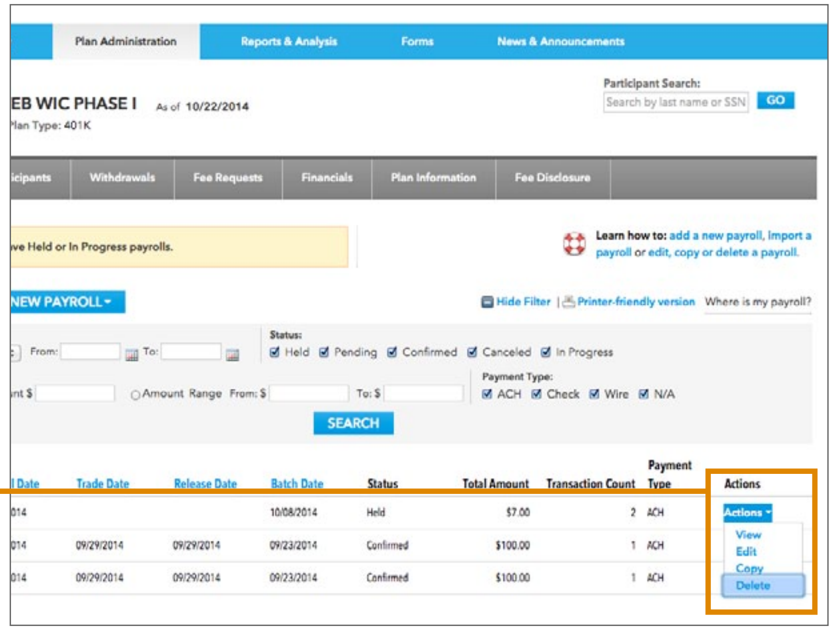
You will see a message confirming that your payroll has been submitted. To see the status, find the batch number in the list below.

Delete Payroll

1. Delete a payroll

Click the Actions drop-down menu and select **Delete**.

Click **Yes** to confirm that you want to delete this payroll.



You will see a message confirming that your payroll has been deleted.

Note: You can only delete a payroll when the status is listed as Held or In Progress. To delete a Pending payroll, contact us. Please go to the Contact Us section of the website for our phone number and email address.