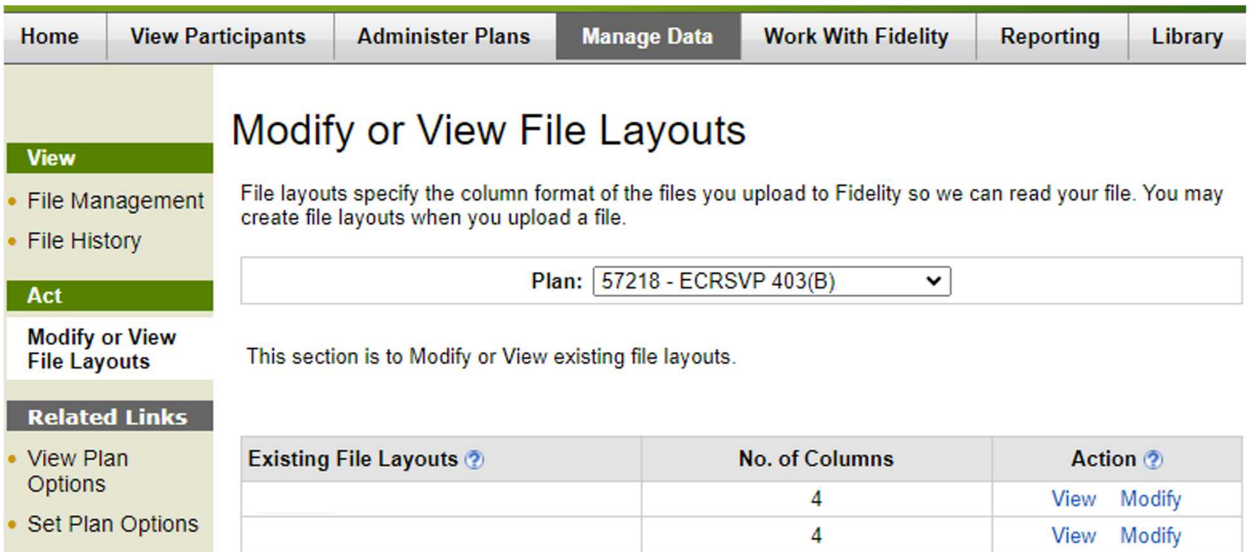
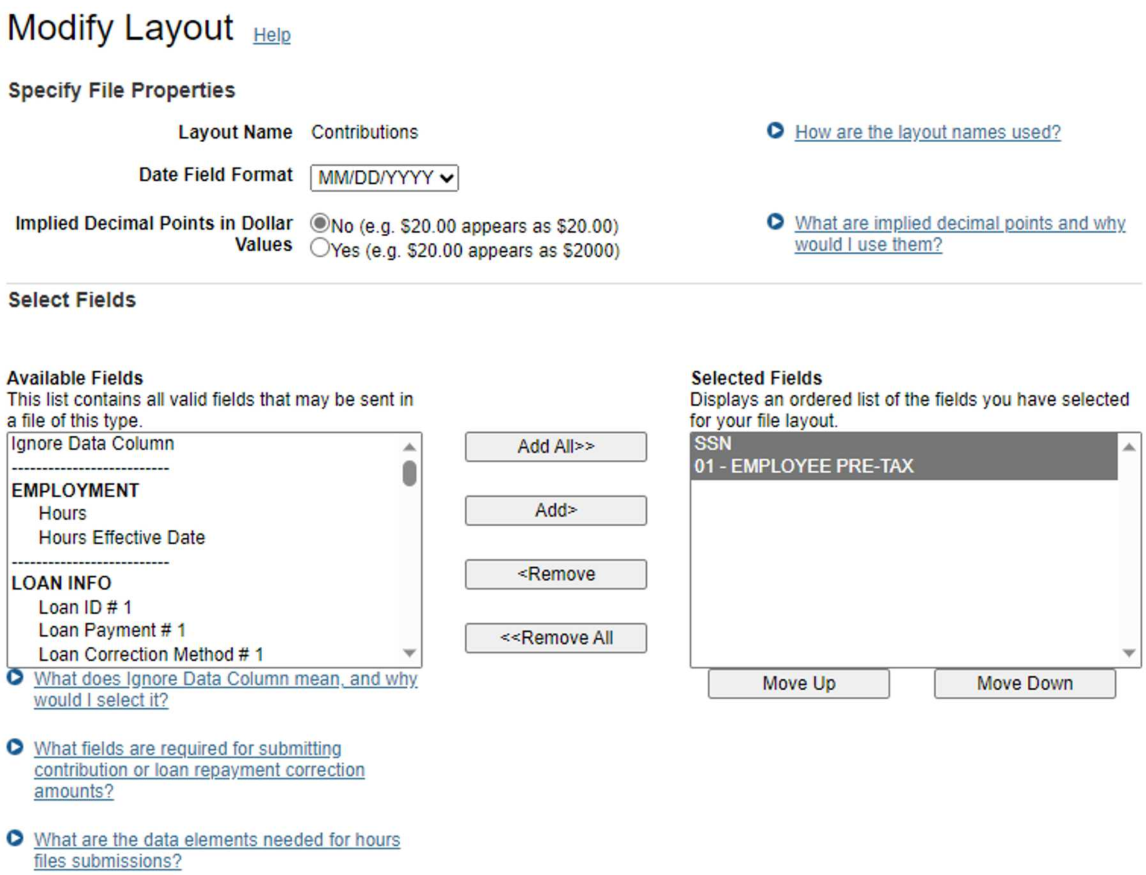
Steps for Adding a Roth Source

Log into the Plan Sponsor Webstation to make a contribution request.

- Navigate to the “Manage Data” Tab and select “View & Modify File Layouts”.
- On the Modify or View File Layouts page, there will be a list of Existing File Layouts. Find the layout that is typically used for contributions and select “Modify”.”

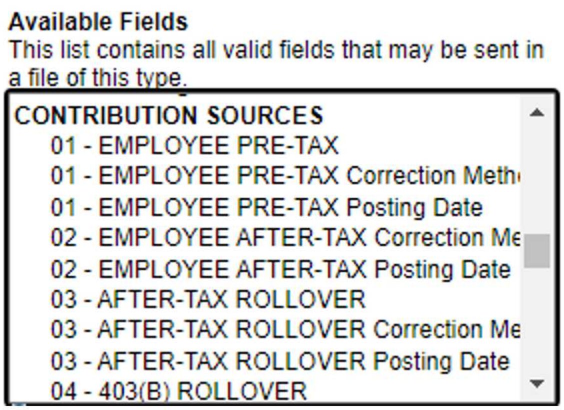


- The next page is the Modify Layout Page. Here is where we can add a Roth source to the File Template for future contributions. The screen will look like this:

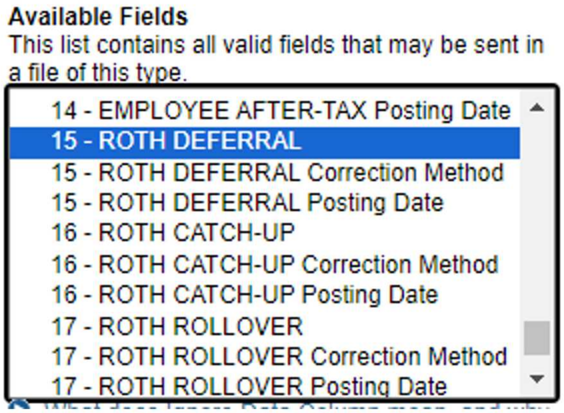


*Please note this is a sample template and the "**Selected Fields**" section may appear differently than your specific file.

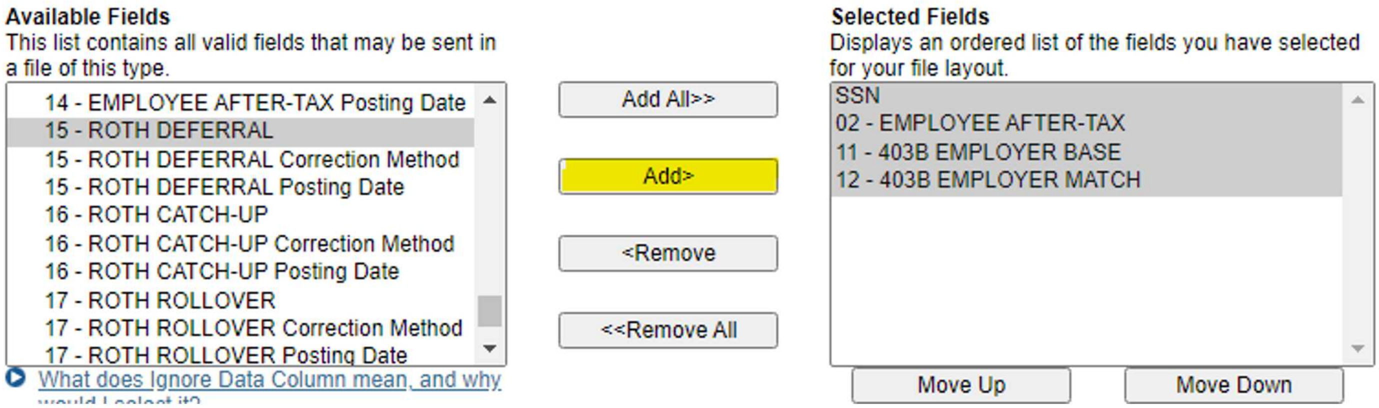
- To add "Roth Deferral" or "Roth Catch-up" contribution we need to scroll through the "Available Fields" section down to CONTRIBUTION SOURCES.



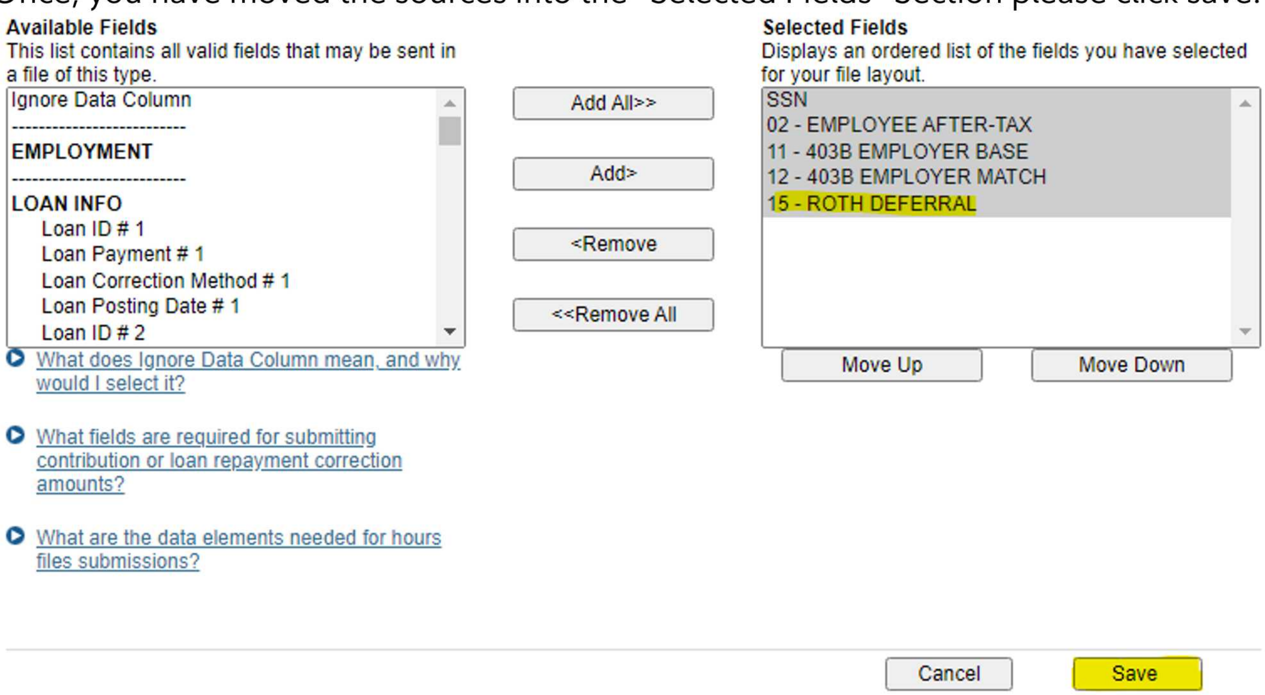
- Once you have found CONTRIBUTION SOURCES continue to scroll until you find Roth Deferrals and Roth Catch-up.



- Next, select on the source you wish to add to your layout then click "Add >"



- Once, you have moved the sources into the "Selected Fields" Section please click save.



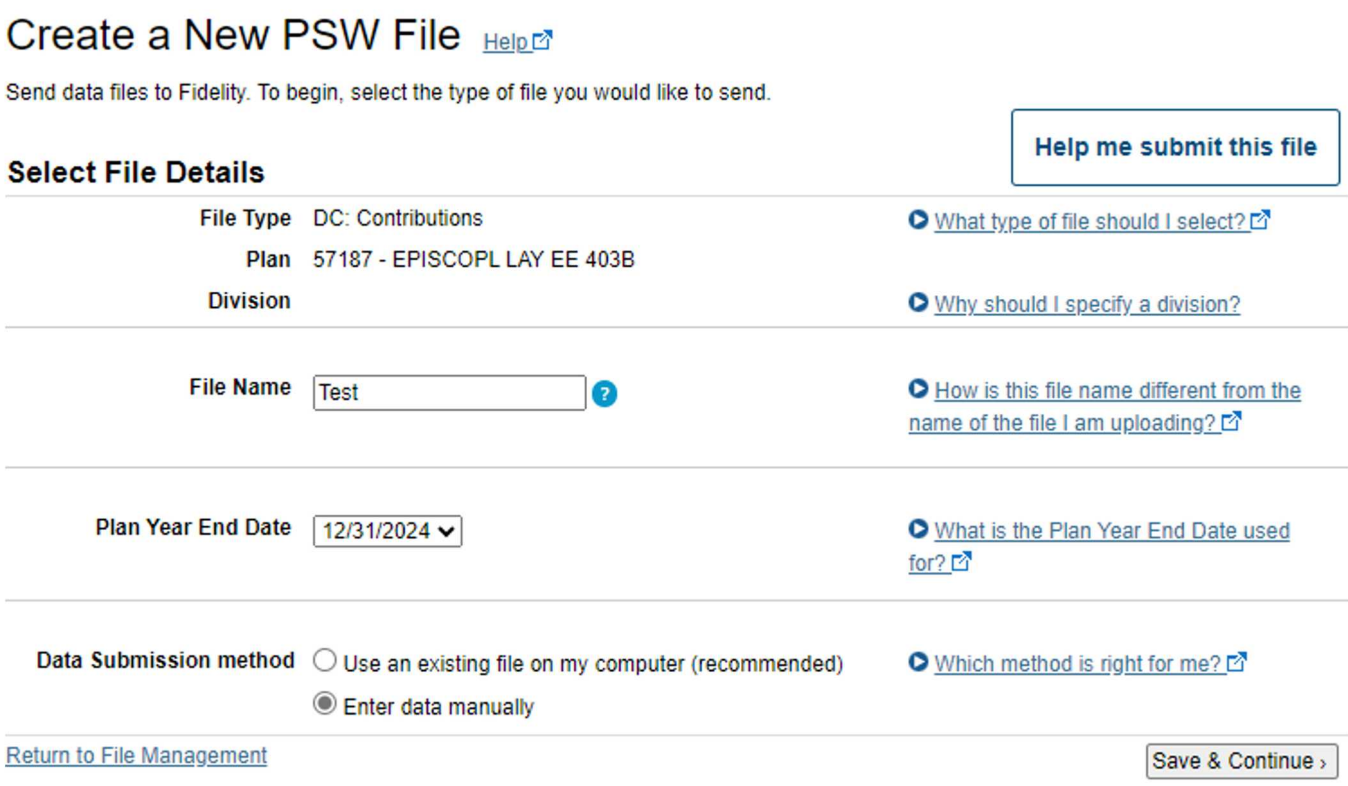
- Your File Template will now be updated to include the new source!

Once this process is complete, the last step will be to add the new source(s) as columns in the excel spread file that is uploaded with the contribution information. You are now ready to complete your contributions!

Steps for Entering Data Manually

Log into the Plan Sponsor Webstation to make a contribution request.

- Navigate to the "Manage Data" Tab and select "Create or Send a File". On the next page add the File Name and select to "Enter data manually"



- Next choose your search criteria, for this example I chose "One Participant"

Manually Enter Contribution Data

To enter contribution data manually for one or more participants, you begin by retrieving their data.

If you manually enter participant data, learn how to save time by uploading a file from your computer.

Plan: 57187 EPISCOPL LAY EE 403B	**Division:** 485-323-29
File Name: Test	**Tracking Number:** 01080P

You would like to enter data for:

- One Participant
- Multiple Participants

Enter the search criteria.

Search by: All Participants **Search for:**

Show: Select a Status

Search for this Participant

Return to File Management

- Once you have selected the Participant you wish to create the contribution, you will now have a list of sources to choose from.
- Roth Deferral and Roth Catch-up will now be listed at the bottom. Enter in the desired dollar amount for the contribution, then click "Enter Changes and View Confirmation."

Contribution Information

Source:	Amount:	Correction Y/N?:	Correction Method:	Posting Date:
01-EMPLOYEE PRE-TAX	$			
02-EMPLOYEE AFTER-TAX	$			
03-AFTER-TAX ROLLOVER	$			
04-403(B) ROLLOVER	$			
05-401(A) ROLLOVER	$			
06-457 ROLLOVER	$			
07-IRA ROLLOVER	$			
08-EE PRE-TAX CATCH-UP	$			
09-EMPLOYER 1	$			
10-EMPLOYEE PRE-TAX	$			
11-403B EMPLOYER BASE	$			
12-403B EMPLOYER MATCH	$			
13-QNEC	$			
14-EMPLOYEE AFTER-TAX	$			
15-ROTH DEFERRAL	$ 1			
16-ROTH CATCH-UP	$			

Enter Changes and View Confirmation

- Next review the confirmation for accuracy, then click "Continue & Submit to check for errors."

Contribution Information		
Source:	**Current Contribution:**	**Posting Date:**
01-EMPLOYEE PRE-TAX	$	
02-EMPLOYEE AFTER-TAX	$	
03-AFTER-TAX ROLLOVER	$	
04-403(B) ROLLOVER	$	
05-401(A) ROLLOVER	$	
06-457 ROLLOVER	$	
07-IRA ROLLOVER	$	
08-EE PRE-TAX CATCH-UP	$	
09-EMPLOYER 1	$	
10-EMPLOYEE PRE-TAX	$	
11-403B EMPLOYER BASE	$	
12-403B EMPLOYER MATCH	$	
13-QNEC	$	
14-EMPLOYEE AFTER-TAX	$	
15-ROTH DEFERRAL	$ 1	
16-ROTH CATCH-UP	$	

Continue & submit to check for errors

- This will submit the contribution request and check for errors, once completed if there are no errors the file will be ready for funding.
- You will the apply funding to complete your contributions.
-

If you have questions about these processes, please email the Client Services Team at FidelityTeamTEM@fmr.com

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