

# SIMPLE IRA Plus

Website user guide for plan sponsors and administrators



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## It's easy to manage your SIMPLE IRA Plus plan online

Use this guide to help manage your plan. It includes step-by-step instructions on how to add and update participants, enter payroll information and access any necessary forms.

### Jump to a section:

- 2 | [Add participants](#)
- 3 | [Update participants](#)
- 4 | [Change participants' investment elections](#)
- 5 | [Manually add a payroll](#)
- 7 | [Import a payroll](#)
- 10 | [View, edit, copy or delete a payroll](#)
- 13 | [Access SIMPLE IRA Plus reports](#)
- 14 | [Access SIMPLE IRA Plus forms](#)
- 15 | [Frequently asked questions](#)
- 15 | [Contact information](#)

The screenshot displays the 'EMPLOYERS & PLAN SPONSORS' section of the website. It features a navigation bar with 'HOME', 'OTHER SITES', and 'EMPLOYERS & PLAN SPONSORS'. Below this is the Capital Group logo and a secondary navigation bar with 'Plan Summary', 'Plan Administration', 'Reports & Analysis', 'Forms', and 'News & Announcements'. The main content area shows the 'Plan Summary' for 'CLAIRE JONES' as of 02/01/2023, with Plan ID 43100 and Plan Type SIM-IRA. A table lists the plan name 'JONES CO. SIMPLE IRA PLUS PLAN' with a balance of \$126,542.50, YTD contributions of \$2,300.00, and 5 participants. Below the table is an 'Assets' section with a pie chart and a table of investments. The largest investment is at 94.43%, followed by others at 3.05%, 1.20%, 0.46%, 0.46%, and 0.40%. A box on the right shows the 'Total Balance: \$126,542.50'.

Plan Name	Balances	YTD Contributions	Participants
JONES CO. SIMPLE IRA PLUS PLAN	\$126,542.50	\$2,300.00	5
Total	\$126,542.50	\$2,300.00	5

Investment	Percentage
Investment 1	94.43%
Investment 2	3.05%
Investment 3	1.20%
Investment 4	0.46%
Investment 5	0.46%
Investment 6	0.40%

Total Balance: \$126,542.50

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

## Add participants

### Before you start, you'll need each participant's:

- Social Security number
- First and last name
- Birth date
- Mailing address
- Current plan status (e.g., active, eligible, terminated)
- Hire date
- Plan participation start date
- Investment elections

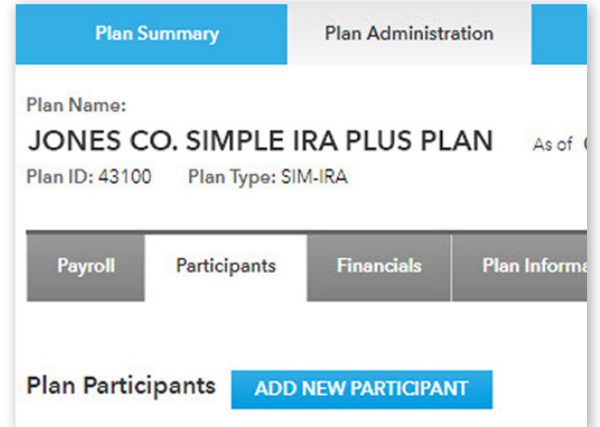
This information can be found in the participant's enrollment or change form.

### 1 | Add a new participant

After logging in, click the **Plan Administration** tab.

Then click the **Participants** tab beneath it.

Next, click **ADD NEW PARTICIPANT**.



### 2 | Enter participant information

Enter the participant's Social Security number and click **VERIFY**.

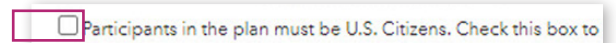
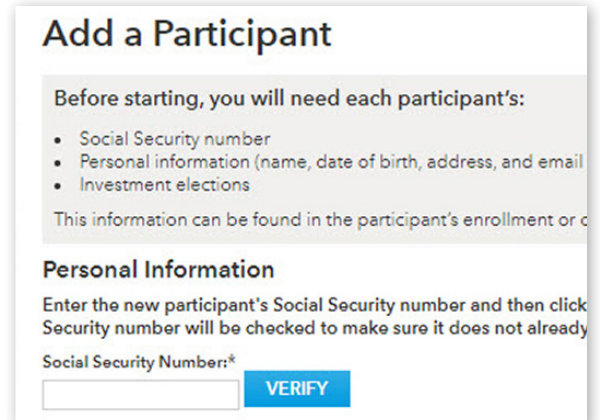
**Note:** If a record associated with the participant's Social Security number already exists in your plan, you will receive an error message. If not, you can enter information into the remaining fields.

Enter the participant's personal and employment information. All required fields are marked with an asterisk.

**Check the box** indicating the participant is a U.S. citizen.

**Note:** Only U.S. citizens and adults can be added online. To add a non-citizen or minor participant, call us at (800) 421-6621, ext. 40.

When finished, click **ADD PARTICIPANT**.



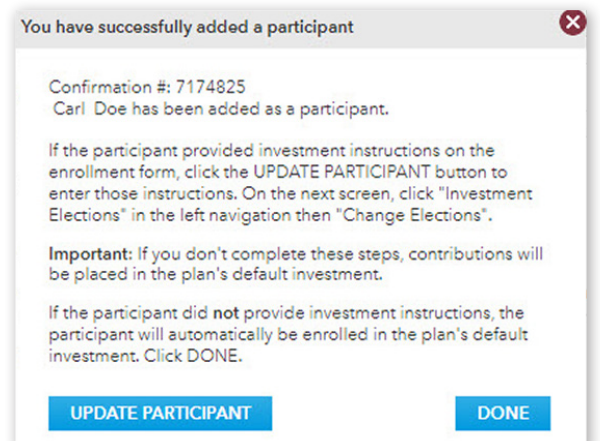
### 3 | Confirmation of success

You will receive a message confirming that the participant has been added to the plan.

**IMPORTANT:** Upon being added, a new participant's contributions will be invested in the plan's default investment unless they make a different election. If the new participant has provided investment elections, they should be updated now to ensure the participant's funds are invested accordingly.

To change the investment elections for a participant, click **UPDATE PARTICIPANT**.

Otherwise, click **DONE**.



# Update participants

**IMPORTANT:** Changes to a participant's name, except when correcting a typo, must be requested in writing. To change a participant's name, you must complete and submit the Name Change Request form along with appropriate documentation as well as a letter of instruction with your plan name or plan ID. Other updates, including correcting a typo in a name as well as changes to the date of birth, gender, marital status, employment status and hire date, can be processed online following the directions below.

## 1 | Update a participant

After logging in, click the **Plan Administration** tab.

Then click the **Participants** tab beneath it.

Locate the participant in one of two ways:

- Enter the participant's last name, Social Security number or status in the first box, or
- Leave the status (in the second box) set to its default, **All**, to view all participants in your plan.

Click **SEARCH**.

Plan Summary | Plan Administration | Reports & Analysis

Plan Name: JONES CO. SIMPLE IRA PLUS PLAN As of 02/01/2023  
Plan ID: 43100 Plan Type: SIM-IRA

Payroll | Participants | Financials | Plan Information

Plan Participants **ADD NEW PARTICIPANT**

Search Last Name or SSN: Last Name/ SSN Status: All **SEARCH**

## 2 | Select participant

Click on the participant's name and select **Participant Information**.

Name	SSN
Aggarwal, Darpan	xxx-xx-4203
<b>View as Participant</b>	xxx-xx-7526
<b>Participant Information</b>	xxx-xx-7850

## 3 | Update information

On the **Personal & Employment Information** tab, update all applicable information.

When finished, click **DONE**.

Update Darpan Aggarwal

Personal & Employment Information | Personal Information

Social Security Number: xxx-xx-4203

First Name: Darpan Middle Name: Last Name: Aggarwal

Birth Date: Gender: Marital Status:

## 4 | Verify changes

Updated information will appear in bold. To make additional changes, click **BACK**.

If all of the information is correct, click **SUBMIT**.

Please verify the following:

Personal Information: Social Security Number: xxx-xx-4203, First Name: Darpan, Middle Name: , Last Name: Aggarwal, Birth Date: 11/20/1985, Gender: Not Applicable, Marital Status:

Contact Information: Mailing Address: 3500 WISEMAN BLVD, SAN ANTONIO, TEXA 78251-4320, E-Communications:

**BACK** **CANCEL**

## 5 | Confirmation of success

A green confirmation message will appear at the top of the **Participants** tab. Your changes are effective immediately.

Payroll | Participants | Financials | Plan Information

**Success. Participant updates have been completed. Confirmation #: 776504**

# Change participants' investment elections

## 1 | Change elections

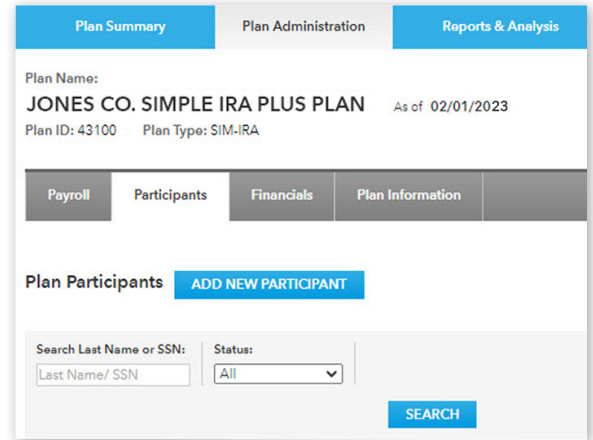
After logging in, click the **Plan Administration** tab.

Then click the **Participants** tab beneath it.

Locate the participant in one of two ways:

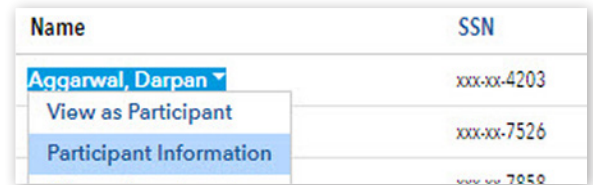
- Enter the participant's last name, Social Security number or status in the first box, or
- Leave the status (in the second box) set to its default, **All**, to view all participants in your plan.

Click **SEARCH**.



## 2 | Select participant

Click on the participant's name and select **Participant Information**.



## 3 | Select investments

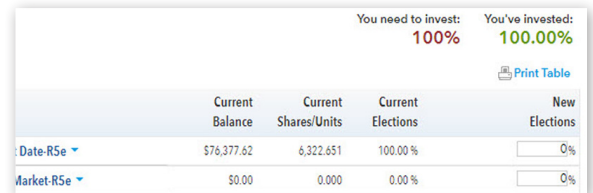
Click the **Investment Elections** tab.

Then click the **Change Elections** link at the top, near Investment Elections.



## 4 | Input new elections

In the **New Elections** column, enter the whole percentage for each fund indicated by the participant on their enrollment/change form. Verify that the allocations add up to 100%.

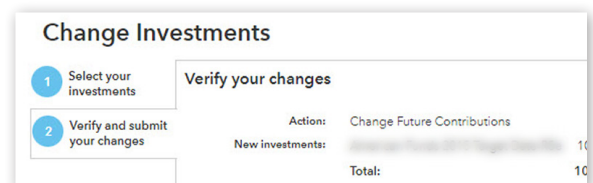


**Note:** The investments are not listed online in the same order as they are listed on the retirement plan enrollment/change form, so be careful to enter the right values for each fund.

## 5 | Verify changes

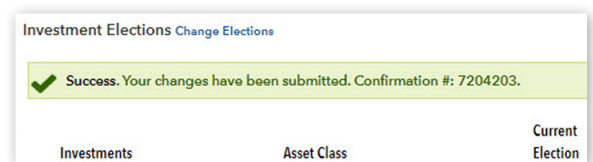
Review the investment elections information for accuracy. If you need to make any changes, click **BACK**.

If all of the changes are correct, click **SUBMIT**.



## 6 | Confirmation of success

A green confirmation message will appear at the top of the **Investment Elections** tab. Your changes are effective immediately.



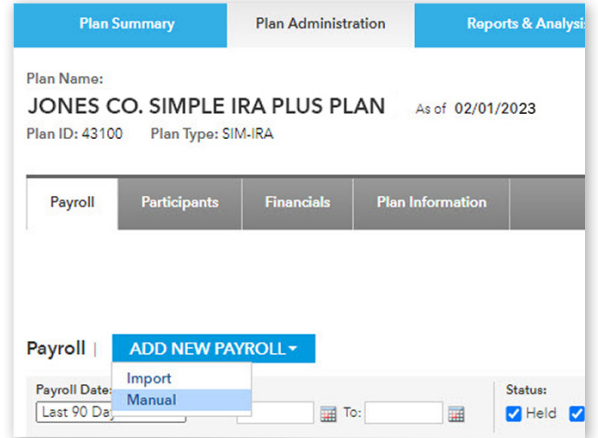
# Manually add a payroll

## 1 | Manually add a payroll

After logging in, click the **Plan Administration** tab.

This takes you to the **Payroll** section.

Then click **ADD NEW PAYROLL** and select **Manual**.

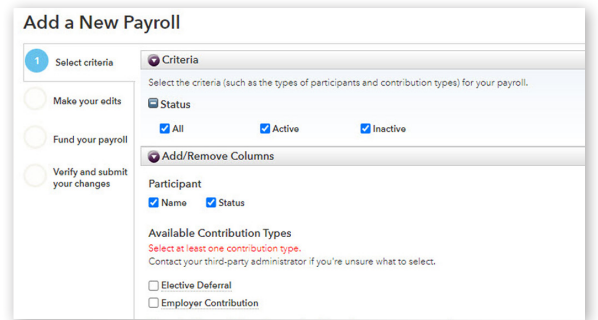


## 2 | Select criteria

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

**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.)

When finished, click **CONTINUE**.



## 3 | Update payroll, if necessary

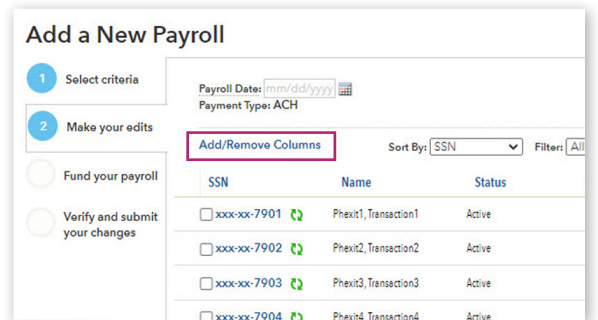
Choose a payroll date.

**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. ET will transfer at the close of the **current day**.
- After 4 p.m. ET or on a weekend or holiday will transfer at the close of the **next business day**.

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

Enter the dollar amounts calculated by your payroll software or payroll company for each participant's contribution type in the appropriate columns.



Status	Elective Deferral	Employer Contribution	Total
Active	\$ 0.00	\$ 0.00	\$0.00
Active	\$ 0.00	\$ 0.00	\$0.00
Active	\$ 0.00	\$ 0.00	\$0.00



## Manually add a payroll (continued)

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

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.

Participant selection screen showing two participants with checkboxes, Social Security numbers (xxxx-xx-4201 and 4202), names (Mustafa, Kame), and active status. There are input fields for dollar amounts (0.00). Navigation buttons include "Delete Selected Participants", "Add Participants to List", "Previous", "Next", and "Payroll Totals: \$0.00 \$0.00". A "CANCEL" button is on the left and a "SAVE AND CONTINUE LATER" button is on the right.

## 4 | Fund payroll

**Note:** This step only applies if you have multiple bank accounts.

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

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

When finished, click **CONTINUE**.

Funding payroll screen showing "Bank Accounts" and "Funding Amount" fields. A summary shows "You need to fund \$400.00" and "You have funded \$400.00". Below are two tables for bank accounts. The first table is for "Plan Bank Account (\* indicates the default) 43100" with columns for Reg 1, Reg 2, Account Type, Account Number, Routing Number, and Funding Amount. The second table is for "Plan Bank Account: 43100" with the same columns. The total funding amount is \$400.00.

## 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.

"Add a New Payroll" screen showing a progress indicator with four steps: 1. Select criteria, 2. Make your edits, 3. Fund your payroll, and 4. Verify and submit your changes. The current step is 4. The screen displays "Verify that the payroll information below is correct." and "Verify your payroll is accurate. If any changes are needed, click Back to edit your payroll." The payroll date is 02/01/2023 and the payment type is ACH. There are sections for "Contributions" and "Contribution Type" with "Elected Deferral" and "Employer Contribution" options.

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

If all of the information is correct, click **SUBMIT**.

## 6 | Confirmation of success

A confirmation will appear, stating that your payroll has been submitted.

To review the status, note the **batch number**, then close the confirmation page. Find this payroll in your payroll list using the batch number and look in the **Status** column.

You can copy this payroll for future payrolls and bypass these steps. To do this, find this payroll in your payroll list, then click **Actions** to choose **Copy**, or review the instructions on [page 12](#).

AMERICAN FUNDS  
Your payroll has been successfully submitted.  
This payroll will be processed on 02/02/2023.

Plan Name:	JONES CO. SIMPLE IRA PLUS PLAN	Plan Type:	SIM-IRA
Plan ID:	43100	Batch Number:	6433971
Payment Type:	ACH	Batch Date:	02/02/2023
Payroll Date:	02/01/2023	Submission Date:	02/02/2023
		Submission Time:	01:11:39 PM

Contributions

# Import a payroll

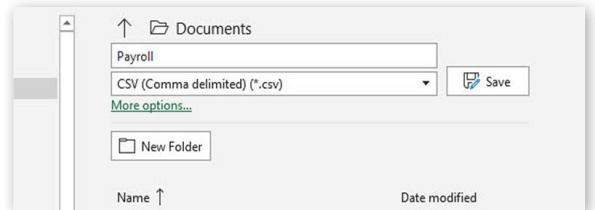
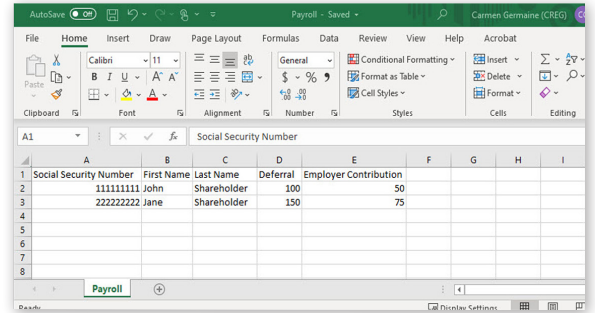
## 1 | Create payroll file

Create an Excel spreadsheet with the following column headings:

- Social Security number
- First and last name, in individual columns (optional)
- Money types to be funded

Enter participant information in each column.

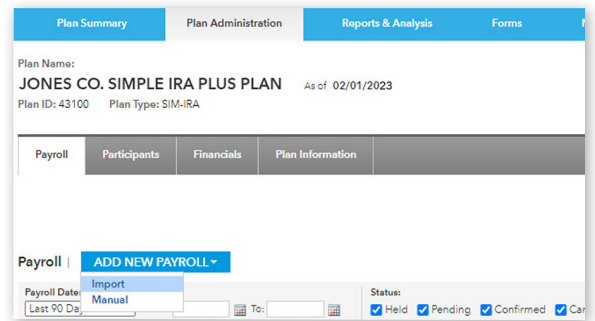
Save the information as a CSV file by selecting **Save As** from Excel's File drop-down menu, then selecting **Comma Separated Values (.csv)** from the **Format** or **Save as type** field.



## 2 | Select criteria

After logging in, click the **Plan Administration** tab. This takes you to the **Payroll** section.

Click **ADD NEW PAYROLL** to select **Import**.



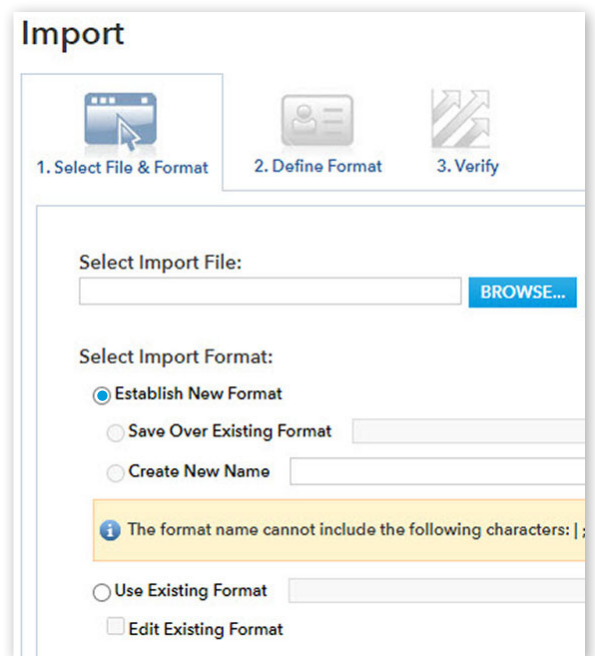
## 3 | Select file and format

Click **BROWSE** to select the CSV file you'd like to import.

Choose your desired import format:

- If you're importing for the first time, choose **Establish New Format** and **Create New Name**. Then enter a name for this format.
- If you're importing the same money types, column values and header rows as previous import files, choose **Use Existing Format** and select the format name.

When finished, click **CONTINUE**.



## Import a payroll (continued)

### 4 | Define the file type

**Note:** You only need to define the file type if you're creating a new format. If you're not, this step will not appear.

Select **Comma Delimited**.

Check the box next to **File contains column headings**.

When finished, click **CONTINUE**.

**Import**

1. Select File & Format 2. Define Format 3. Verify

1 Define file type

Preview import file

Map columns

Fixed Column

Comma Delimited

Semicolon Delimited

Tab Delimited

Other Character Delimited

Apply zero value(s) for Service Time Replacement.

File consists of multiple record layouts.

Column Position of Identifier:

File contains column headings.

**Example**

First Name	Middle Name	Last Name
John	J	Smith
Tom	T	Jones
Mary	M	Doe

John, J, Smith,  
Tom, T, Jones,  
Mary, M, Doe,

John; J; Smith;  
Tom; T; Jones;  
Mary; M; Doe;

John J Smith  
Tom T Jones  
Mary M Doe

John|J|Smith|  
Tom|T|Jones|  
Mary|M|Doe|

### 5 | Preview import file

Review the values and column headings for accuracy. To make changes, go back to **Select File & Format**.

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

When finished, click **CONTINUE**.

**Import**

1. Select File & Format 2. Define Format 3. Verify

1 Define file type

2 Preview import file

Map columns

**Record Layout: SINGLE RECORD LAYOUT**

Record Type:

**Preview of your import file**

Social Security Number	First Name	Last Name	Deferral	Employment
111111111	John	Shareholder	100	50
222222222	Jane	Shareholder	150	75

### 6 | Select column descriptions

Use the drop-down menus in the **Financial Column** to select the appropriate descriptions.

**Note:** For participants' first and last names, choose **SKIP THIS COLUMN**. Remaining columns depend on your plan.

When finished, click **CONTINUE**.

**Import**

1. Select File & Format 2. Define Format 3. Verify

1 Define file type

2 Preview import file

3 Map columns

**Map the import columns, using the column value to help determine the closest information. Note: Select SKIP THIS COLUMN for any names or totals.**

**Record Layout: SINGLE RECORD LAYOUT**

Import Column	Column Value	Financial Column
Social Security Number	111111111	SSN
First Name	John	SKIP THIS COLUMN

### 7 | Choose decimal position

Use the drop-down menus in the **Translation** column to choose the appropriate decimal position.

**Note:** The default is 1 = 1.0 (most people will use this). For data fields in which 100 equals \$1.00, choose 1 = .01.

When finished, click **CONTINUE**.

**Import**

1. Select File & Format 2. Define Format 3. Verify

1 Define file type

2 Preview import file

3 Map columns

**Define the translation rules to apply the data to be imported into the recordkeeping**

**Record Layout: SINGLE RECORD LAYOUT**

Mapped Column	Column Value	Translation
CONTRIBUTION AMOUNT-Elective Deferral	100	1 = 1.0
CONTRIBUTION AMOUNT-Employer Contribution	50	1 = 1.0



## Import a payroll (continued)

### 8 | Update payroll, if necessary

Choose a payroll date and review the amount for each participant's contribution type for accuracy.

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

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

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.

SSN	Name	Status	Elective Deferral	Employ
<input type="checkbox"/> xxx-xx-7654	Doe, Carl	Active	\$   0.00	
<input type="checkbox"/> xxx-xx-4203	Apparval, Darpan	Active	\$   0.00	
<input type="checkbox"/> xxx-xx-7526	Bennett, Elizabeth	Active	\$   0.00	
<input type="checkbox"/> xxx-xx-7858	Cline, Jasper	Active	\$   0.00	

### 9 | Fund payroll

**Note:** This step only applies if you have multiple bank accounts.

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

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

When finished, click **CONTINUE**.

Reg 1	Reg 2	Account Type	Account Number	Routing Number	Funding Amount
*TEST BANK		Checking	*****7777	1234-5678-9	\$   400.00

Reg 1	Reg 2	Account Type	Account Number	Routing Number	Funding Amount
ANOTHER TEST BANK		Checking	*****5278	1221-0527-8	\$   0.00

### 10 | 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.

Verify that the payroll information below is correct.  
Contributions for payrolls submitted after 4 p.m. (ET) will be transferred on the following business day.  
Verify your payroll is accurate. If any changes are needed, click Back to edit your payroll.  
Payroll Date: 02/01/2023 Payment Type: ACH

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

If all of the information is correct, click **SUBMIT**.

### 11 | Confirmation of success

A confirmation will appear, stating that your payroll has been submitted.

To review the status, note the **batch number**, then close the confirmation page. Find this payroll in your payroll list using the batch number and review the **Status** column.

You can copy this payroll for future payrolls and bypass these steps. To do this, find this payroll in your payroll list, then click **Actions** to choose **Copy**, or review the instructions on [page 12](#).

AMERICAN FUNDS®

Your payroll has been successfully submitted.  
This payroll will be processed on 02/02/2023.

Plan Name:	JONES CO. SIMPLE IRA PLUS PLAN	Plan Type:	SIM-IRA
Plan ID:	43100	Batch Number:	6433971
Payment Type:	ACH	Batch Date:	02/02/2023
Payroll Date:	02/01/2023	Submission Date:	02/02/2023
		Submission Time:	01:11:39 PM

Contributions

## View, edit, copy or delete a payroll

### View or edit an existing payroll

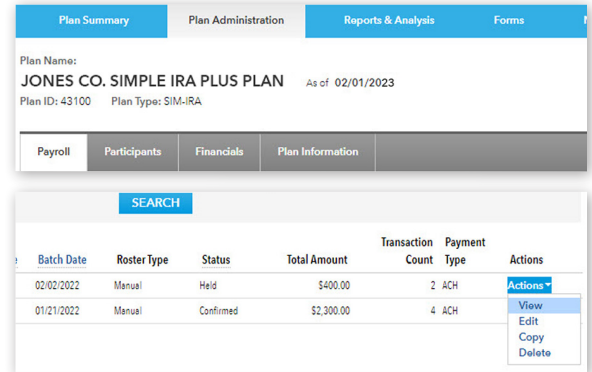
Start here to learn how to view or edit an existing payroll. Or skip to the **Copy or delete an existing payroll** section on [page 12](#).

#### 1 | View or edit a payroll

After logging in, 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:** Only payrolls in a **Held** or **In Progress** status can be edited or deleted. Payrolls in other statuses can only be viewed or copied.



The screenshot shows the 'Plan Administration' tab with a sub-tab for 'Payroll'. The plan name is 'JONES CO. SIMPLE IRA PLUS PLAN' and the date is 'As of 02/01/2023'. Below the plan name are tabs for 'Payroll', 'Participants', 'Financials', and 'Plan Information'. A search bar is present above a table of payroll records.

Batch Date	Roster Type	Status	Total Amount	Transaction Count	Payment Type	Actions
02/02/2022	Manual	Held	\$400.00	2	ACH	Actions
01/21/2022	Manual	Confirmed	\$2,300.00	4	ACH	View Edit Copy Delete

#### 2 | Edit payroll, if necessary

Choose a payroll date.

**Note:** Contributions for payrolls transmitted using the current date:

- Before 4 p.m. ET will transfer at the close of the **current day**.
- After 4 p.m. ET or on a weekend or holiday will transfer at the close of the **next business day**.

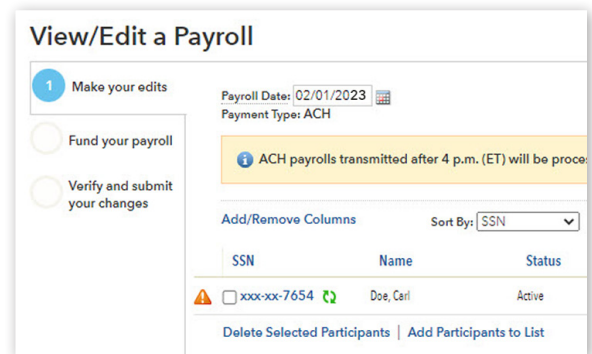
To add a contribution type, click **Add/Remove Columns** and make your selections.

Enter the dollar amounts calculated by your payroll software or payroll company for each participant's contribution type in the appropriate columns.

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

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.



The screenshot shows the 'View/Edit a Payroll' form. It has a left sidebar with three steps: '1 Make your edits' (selected), 'Fund your payroll', and 'Verify and submit your changes'. The main area shows 'Payroll Date: 02/01/2023' and 'Payment Type: ACH'. A yellow warning box states: 'ACH payrolls transmitted after 4 p.m. (ET) will be processed the next business day.' Below this is an 'Add/Remove Columns' section with a 'Sort By' dropdown set to 'SSN'. A table lists participants with columns for SSN, Name, and Status. One participant is shown: 'xxx-xx-7654', 'Doe, Carl', 'Active'. At the bottom are links for 'Delete Selected Participants' and 'Add Participants to List'.

## View, edit, copy or delete a payroll (continued)

### 3 | Fund payroll

**Note:** This step only applies if you have multiple bank accounts.

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

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

When finished, click **CONTINUE**.

**Payroll**

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

Plan Bank Account (* indicates the default) 43100		Description:			
Reg 1	Reg 2	Account Type	Account Number	Routing Number	Funding Amount
*TEST BANK		Checking	*****7777	1234-5678-9	\$ 400.00

**Plan Bank Account: 43100** Description: TEST BANK

Reg 1	Reg 2	Account Type	Account Number	Routing Number	Funding Amount
ANOTHER TEST BANK		Checking	*****5278	1221-0527-8	\$ 0.00

Accounts Totals: \$400.00

**You need to fund \$400.00** **You have funded \$400.00**

### 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:** 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.

If all of the information is correct, click **SUBMIT**.

**View/Edit a Payroll**

- 1 Make your edits
- 2 Fund your payroll
- 3 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 following business day.  
Verify your payroll is accurate. If any changes are needed, click **Back** to edit your payroll.  
Payroll Date: 02/01/2023 Payment Type: ACH

**Contributions**

**Contribution Type**

Elective Deferral  
Employer Contribution

**Funding Method(s)**

**Bank Accounts**  
Bank accounts will be automatically debited when you submit your payroll.

Plan Bank Account (* indicates the default) 43100		Description:		
Reg 1	Reg 2	Account Type	Account Number	Routing Number
*TEST BANK		Checking	*****7777	1234-5678-9

### 5 | Confirmation of success

A confirmation will appear, stating that your payroll has been submitted.

To review the status, note the **batch number**, then close the confirmation page. Find this payroll in your payroll list using the batch number and review the **Status** column.

**AMERICAN FUNDS**

**Your payroll has been successfully submitted.**  
This payroll will be processed on 02/02/2023.

Plan Name:	JONES CO. SIMPLE IRA PLUS PLAN	Plan Type:	SIM-IRA
Plan ID:	43100	Batch Number:	6433971
Payment Type:	ACH	Batch Date:	02/02/2023
Payroll Date:	02/01/2023	Submission Date:	02/02/2023
		Submission Time:	01:11:39 PM

**Contributions**

## View, edit, copy or delete a payroll (continued)

### Copy or delete an existing payroll

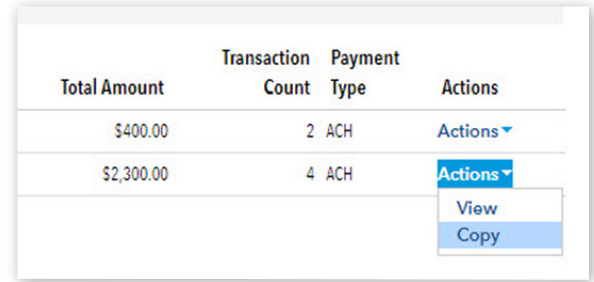
#### Copy a payroll

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

Follow the **Edit payroll** steps beginning on [page 10](#).

When finished, click **SUBMIT**.

A message will appear, confirming that your payroll has been submitted. To review the status, find this payroll in your payroll list using the batch number and review the **Status** column.

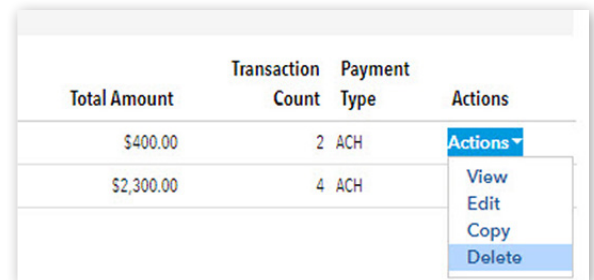


Total Amount	Transaction Count	Payment Type	Actions
\$400.00	2	ACH	Actions ▾
\$2,300.00	4	ACH	Actions ▾ View Copy

#### Delete a payroll

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

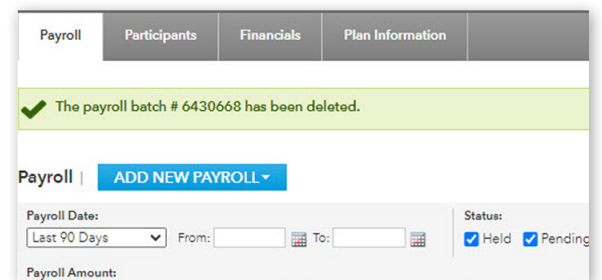
Click **Yes** to confirm that you want to delete this payroll.



Total Amount	Transaction Count	Payment Type	Actions
\$400.00	2	ACH	Actions ▾
\$2,300.00	4	ACH	View Edit Copy Delete

A message will appear, 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 payroll listed as **Pending**, contact us. Please refer to [page 15](#) or go to the **Contact Us** section of the website for our phone number.



Payroll | Participants | Financials | Plan Information

✓ The payroll batch # 6430668 has been deleted.

Payroll | **ADD NEW PAYROLL**

Payroll Date: Last 90 Days ▾ From: [ ] To: [ ] Status:  Held  Pending

Payroll Amount:

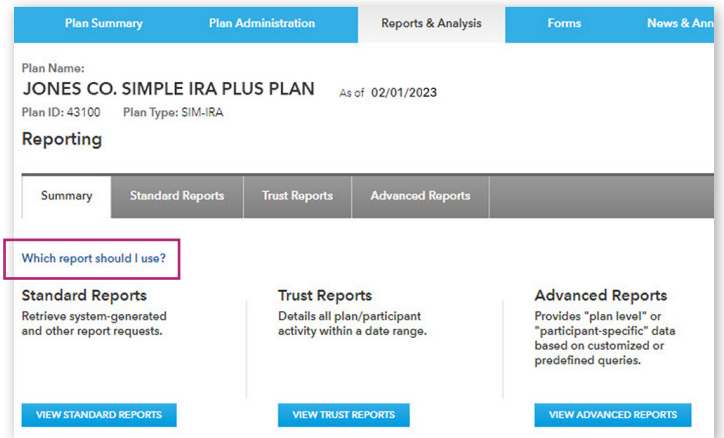
## Access SIMPLE IRA Plus reports

Use this section to access and generate reports to help monitor and manage your plan.

### Step 1

After logging in, click the **Reports & Analysis** tab.

Then select the type of report you want to view.



**Note:** If you're not sure which report you need, click on **Which report should I use?** for more information on the purpose of each report and how to create each type.

### Types of reports

The following types of reports can be generated online. Please consult with your financial professional or tax advisor to determine which reports will best suit your needs.

<b>Standard reports</b>	<b>Defaulted participant report</b> Lists participants that are invested in the plan default rather than funds selected by the participant. Generated automatically when information is available. <i>Review and compare this report with enrollment forms to ensure the correct allocations are being used.</i>
	<b>Contribution report</b> Lists employee and employer contributions for a specific time frame. Created on demand.
<b>Trust reports</b>	List all transactions within the plan for a specific time frame. Created on demand. <i>Trust reports can be used to create a basic report for administration and testing purposes. You can also use this function to break down assets in the plan by contribution type, fund or other filters.</i>
<b>Advanced reports</b>	List or filter any information in the plan, including: <ul style="list-style-type: none"><li>• Participant information, such as name, portfolio balance or birth date</li><li>• Transactions, such as contributions, distributions or exchanges</li><li>• Current assets, including by fund or by contribution type</li></ul> <i>Advanced reports can be used to search for specific information, such as participants with high balances in a certain fund or old payroll contributions within a given date range.</i>



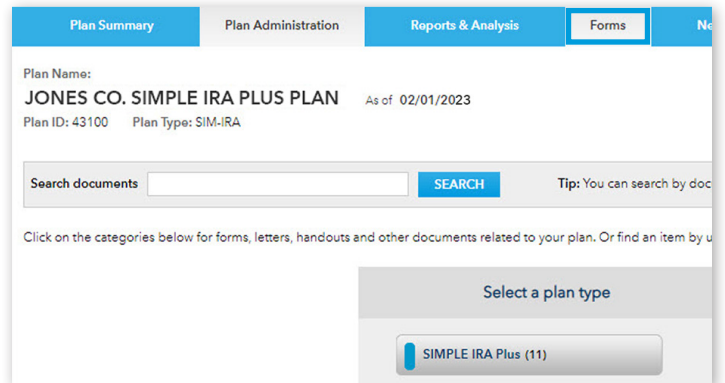
## Access SIMPLE IRA Plus forms

Use this section to access forms needed for changes that need to be manually submitted, such as changing a participant's last name or updating plan contacts.

### Step 1

After logging in, click the **Forms** tab.

Then click **SIMPLE IRA Plus** to load the forms specific to your plan.

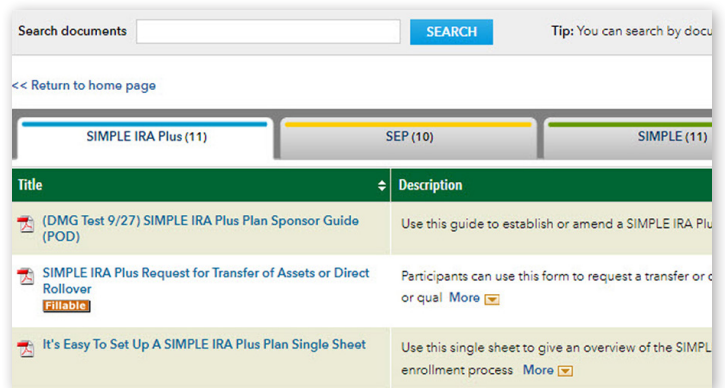


### Step 2

On this page, there will be a list of SIMPLE IRA Plus forms, including the SIMPLE IRA Plus Enrollment/Change form needed to make changes to a participant's name or date of birth.

**Note:** Remember to include a letter of instruction with your plan ID with any form or application you submit to us directly.

Click on the form name to download the PDF file.



## Frequently asked questions

### Getting started

#### How do I get internet access to my plan?

For help establishing a user ID, please check your plan ID, then contact us at the phone number below.

#### When can I start viewing my plan information?

As soon as you log in and agree to the terms and conditions statement, you can view your plan information. Make sure to read and fully understand the terms and conditions before viewing your information.

#### How do I change my password?

You can change your password by logging in and then selecting Change password from the **Preferences** drop-down menu at the top-right of the screen.

#### What happens if I forget my password or get locked out?

You may be able to reset your password online if you've established the security measures to do so. Click **Reset password** on the login page and follow the directions.

Otherwise, check your plan ID number, then contact us at the phone number below.

#### I forgot my user ID. What can I do?

If you've forgotten or lost your user ID, check your plan ID number, then contact us at the phone number below.

#### Will I be charged for accessing my plan online?

No, plan sponsor access is free.

#### How can a plan participant access their account on the website?

The website address for the participant is [capitalgroup.com/retire](https://capitalgroup.com/retire). The Accessing Your Account handout located in the forms section (for participants: Handouts and Instructions) can be provided to the participant and will go over how the participant can access their account on the website.

### Plan operation

#### Does the website integrate with my company payroll?

No. When adding a payroll, use the information provided by your payroll software to calculate and enter the dollar amounts for each participant's contribution.

#### What does each contribution type mean?

There are two types of contributions. **Elective deferral** refers to employee contributions, the pretax amount taken from the employee's gross pay. **Employer contribution** refers to the amount you contribute as either an employer matching contribution or employer non-elective contribution.

#### What does each payroll status mean?

After your submit a payroll, the payroll status will then list as one of four options:

- **In progress:** Indicates the payroll is saved but has not been submitted for processing.
- **Held:** Indicates the payroll has been submitted for processing, but funds have not yet posted to participants' accounts.
- **Pending:** Indicates the payroll has been submitted for processing and that funds will post to participants' accounts during the current business day.
- **Confirmed:** Indicates the payroll has been processed and that funds have already been posted to participants' accounts.
- **Confirmed canceled:** Indicates the payroll submission was canceled.

Only payrolls in a **Held** or **In Progress** status can be edited or deleted. **View or edit an existing payroll**, [page 10](#), or **Copy or delete an existing payroll**, [page 12](#), for instructions.

## Contact information

### Connect with Capital Group

**(800) 421-6621, ext. 40**

Available 8:00 a.m. to 7:00 p.m. ET,  
Monday through Friday.

If you use a teletypewriter (TTY) or other telecommunications device for the deaf (TDD), you may contact us via a relay service.

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