HOW TO

Copy Forward

The copy forward function is useful when you need to create a new contribution file, and all the information is the same from the previous cycle to the current one. In order to start this process, go to the **Contribution File Correction and Manual Contribution Entry** menu item.

Steps:

1. Select the "Contribution File Correction and Manual Contribution Entry" menu item.

2. The system displays the Contribution File Correction and Manual Contribution Entry screen.

3. In the Posted Employer Reporting Header panel, check the box next to the Header ID you wish to copy forward.

4. Enter the **Pay Date** for the new Contribution Report you are creating this Cycle Code.

5. Click "Copy Forward."

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6. Click "Save" (this will populate information).

Once you click "Save" in the previous step, the system carries over the information from the prior file.

The records found under the Contribution Information panel will show the Social Security numbers and last names, as well as the period 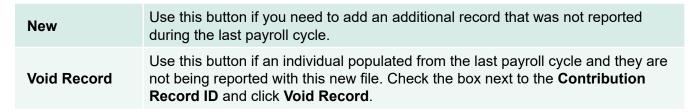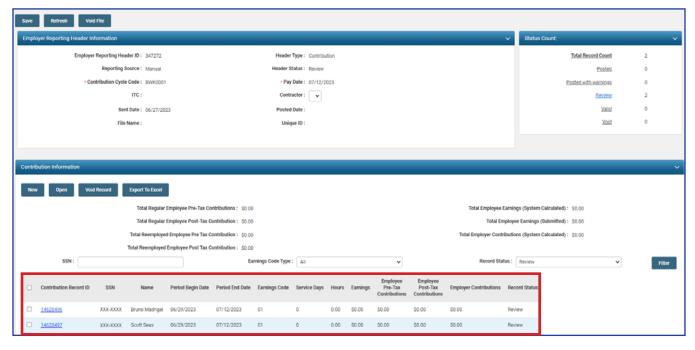begin and period end dates associated with the pay date entered. You will enter manually per record the details found in the red box.

New	Use this button if you need to add an additional record that was not reported during the last payroll cycle.
Void Record	Use this button if an individual populated from the last payroll cycle and they are not being reported with this new file. Check the box next to the **Contribution Record ID** and click **Void Record**.

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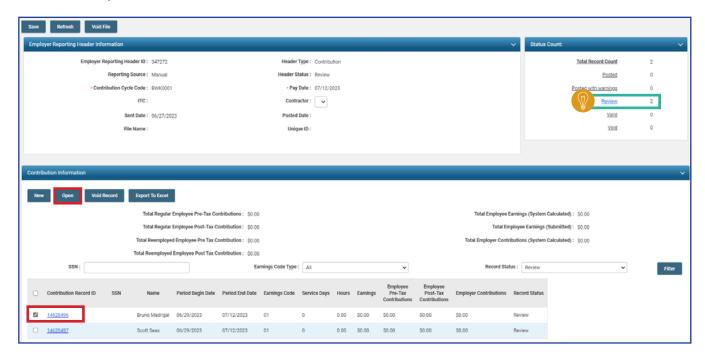**Steps:**

7. Check the box next to the record(s) or click the **Contribution Record ID** you wish to update in the Contribution Information Panel. To fix a record, click the Contribution Record ID number.
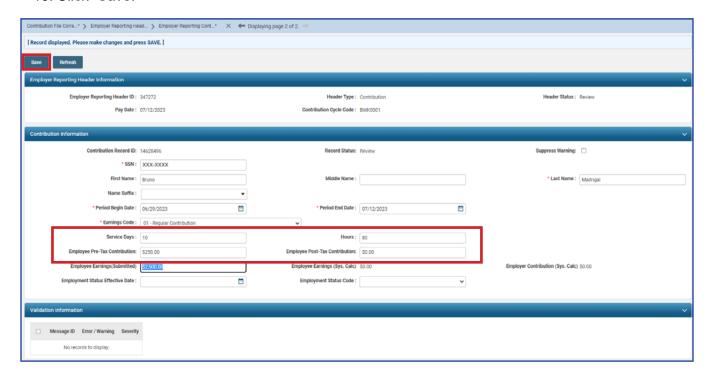
8. Click "Open."

> **Tip:** If you would like to update all of the records at once, click on the "Review" hyperlink, and you will be able to update a contribution record and move to the next without changing screens.

The employee's SSN and last name are already populated, along with the period begin and end dates and the earnings code. The earnings code can be changed if necessary.

Steps:

9. Enter the following information:
   - Service Days
   - Hours
   - Employee Pre-Tax or Post-Tax Contributions (10%)
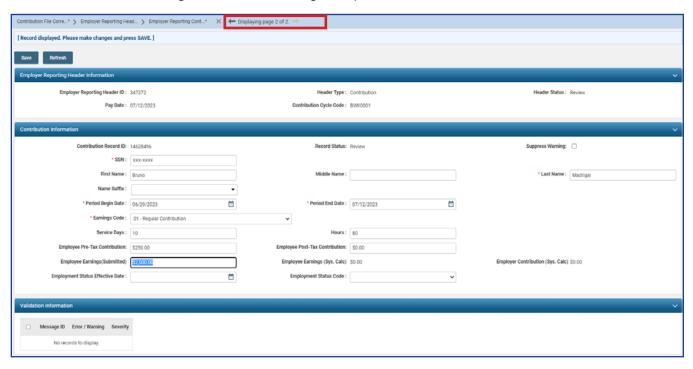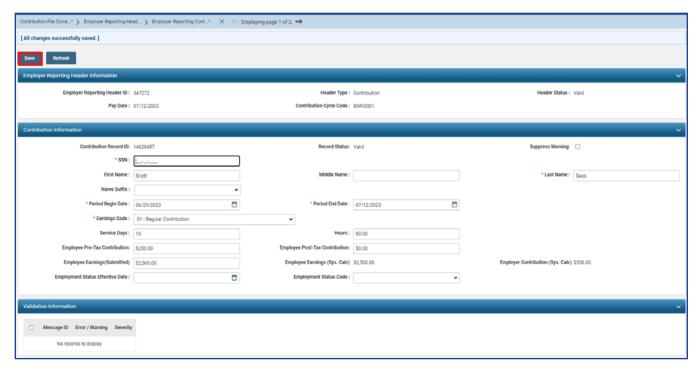   - Employee Earnings (Submitted)

10. Click "Save."

Once the record is saved, it will display any errors or warnings in the Validation Information panel. Once the errors or warnings are resolved (if applicable), continue to the next record(s).

Steps:

11. Click on the left or right arrow in the navigation path to move to the next record.

The system brings up the next record. Repeat steps nine through 11 until all records are updated with the required information described in step nine. If you have multiple individuals who need contribution information, follow the previous steps.
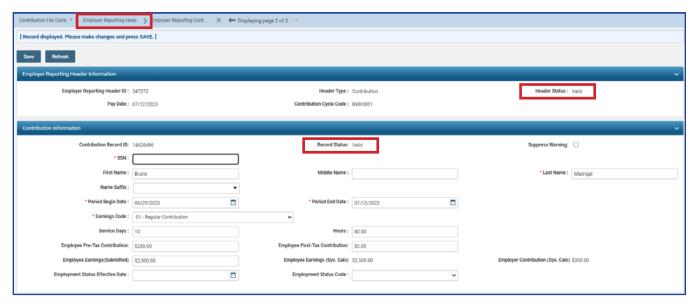
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On the final record, both the header and detail records will change to a valid status once you have updated the required fields and clicked Save. This means you are ready to submit this file for posting.
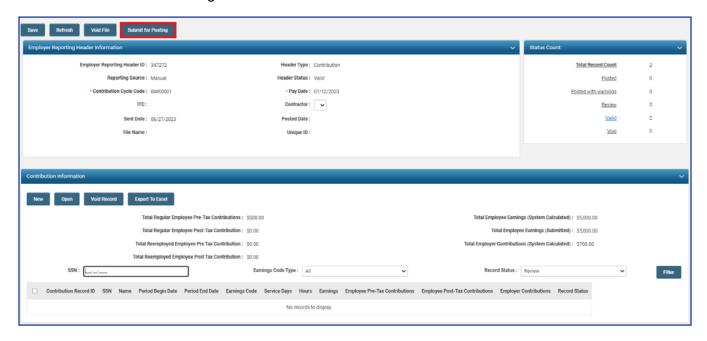
Steps:

12. Click on "Employer Reporting Head..." in the navigation path to take you to the **Employer Reporting Header Maintenance** screen so that you can submit your file for posting.

The Employer Reporting Header Maintenance screen is populated with information based on the detail records that were created.
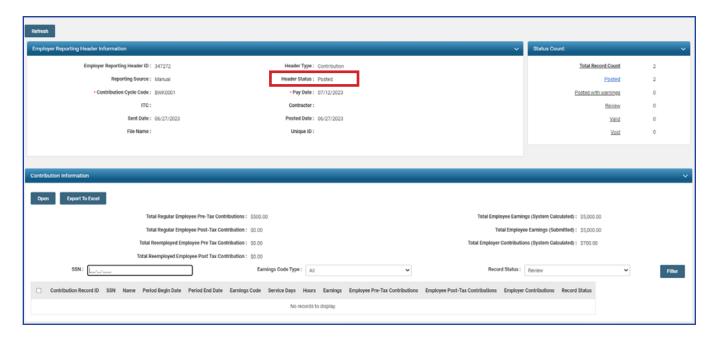
13. Click "Submit for Posting."

Once a report is submitted for posting, it becomes read-only. The header status changes to **Posting in Progress**, and will change to **Posted** once information is processed.

Once your Header Status shows that the file has been posted, you can now go to the Payment Remittance application and submit your payment.

Submitting a contribution record will result in the member's account reflecting a pending transaction.

Dollar amounts are not considered available in the member's account until the employer submits both the contribution record and payment for the corresponding liability created.