



# Plan Sponsor Access

Connect to your plan anytime



## Easy Plan Management, Available Anytime

Plan Sponsor Access from American Century Investments® makes managing your organization's retirement plan easier than ever.

Everything you need to stay on top of your plan and make contributions is available anytime at [americancentury.com](http://americancentury.com).

Review this booklet to find out about the services available and how you can take advantage of them. If you need help along the way, don't hesitate to call us.

### Features by Plan

	SEP, SARSEP- and SIMPLE-IRAs	403(b)	Governmental 457(b)	401(k), Profit Sharing and Money Purchase Pension
Access your plan anytime	●	●	●	●
View plan assets	●	●	●	●
Transmit contributions	●	●	●	●
Add participants				●
Update participant information				●
View/update allocations <small>(one-person plans only)</small>	●			●
Request plan reports		●		●
View participant transaction history <small>(one-person plans only)</small>	●	●		●



## Summary

### Review Plan Information Now

You need some information about the retirement plan you manage, and you need it now. No need to worry. Plan Sponsor Access can help you quickly view both your plan and individual participant information.

Use this tab to get basic information about your plan, including year-to-date contributions and total plan assets.

- If you manage multiple plans, select the plan you want to view.
- Use the tabs across the page or the 'I want to' list on the right for navigation.

## Participants

Use this tab to view participant account information or add new participants.

### View participants

- Enter a specific participant's Social Security number or Last Name and click Retrieve Participants for the list of all participants.
- Click on the dropdown arrow next to the participant you wish to view such as
  - Participant Information (update name, address or status)
  - Account Activity (view recent transaction history)
  - Change Investments (change how future contributions are allocated).

### Adding new participants

- Select Add New Participant
- Enter all required fields (Name, Address, SSN, Birth Date, Employment Status, Hire Date) then click Add Participant.
- Confirm the information and click Done.
- Click on the dropdown arrow next to the New Participant and Select Change Investments to update future contribution allocations. Click Continue when finished and Submit Change after verifying the future allocations.



Select your payroll contribution type.

## Make Contributions

### Payroll Purchasing

Make secure and convenient contributions with the Payroll Purchasing feature.

#### Add a New Payroll

Add Participant criteria for new payroll.

The screenshot shows a web form for adding participant criteria. It includes sections for Status of Participants, Employee Compensation Group, Frequency, and Add/Remove Columns. A 'Note' at the bottom left states: 'Note: Contribution types will vary by plan type.' Green callout boxes provide the following instructions:

- 'Select the appropriate status of participants.' (pointing to the Status of Participants section)
- 'Uncheck all boxes under Compliance Testing and Additional Items.' (pointing to the Compliance Testing and Additional Items sections)
- 'Select the applicable money types for your contribution.' (pointing to the Employer Contribution and Employee Contribution section)

- Choose the Payroll tab, then Add New Payroll and Manual.
- Under **Criteria**, select the appropriate participant statuses.
- **De-select** all **Compliance Testing** and **Additional Items** boxes that are checked.
- Check the contribution types used for your payroll. Options will vary by plan type.
- Click **Continue**.

Once your bank account information is on file, quickly create and transmit a contribution list.

## Make Contributions

### Payroll Purchasing

Make secure and convenient contributions with the Payroll Purchasing feature.

#### Add a New Payroll

1 Search for participants.

2 Make your edits.

3 Fund your payroll.

4 Verify and submit your changes.

Verify your purchases and submit.

This page allows you to edit participant payroll contributions.

Payroll Date: 07/29/2021 HTI Indicate the payroll date of your purchase.

Payment Type:  ACH  Check  Wire  N/A

[Add/Remove Columns](#) Group / Sort:  Filter:  [Print Table](#)

SSN	Name	Status	Employee Deferral	Employer Match	Total
<input type="checkbox"/> xxx-xx-0727	John Doe	Active	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00
<input type="checkbox"/> xxx-xx-0728	Nancy Smith	Active	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00
<input type="checkbox"/> xxx-xx-0730	Juan Vazquez	Active	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00
<input type="checkbox"/> xxx-xx-0731	Erika Roberts	Active	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00
<input type="checkbox"/> xxx-xx-0732	Dave White	Active	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00
<input type="checkbox"/> xxx-xx-0734	Ashley Walter	Active	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00
<input type="checkbox"/> xxx-xx-7845	Doug Mathis	Active	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00
Payroll Totals:			\$0.00	\$0.00	\$0.00

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

Save your purchase list to update or submit later.

- Choose the Payroll tab, then Add New Payroll and Manual.
- Select participant and contribution type.
- Enter the payroll date (which determines the tax year).
- Enter amount for each participant by money type. Click Continue or Save for Later.
- Enter email address to send a copy of the confirmation.
- Click Submit to transmit the purchase.



## Request Plan Reports

- Select Reporting in the header.
- Select Standard Reports for Contribution and Distribution Reports or Employer Reports for full plan details.
- Select Request an Employer Report.
- Enter the appropriate to and from dates.
- Click Request Report.
- Choose the format to view the report (PDF, File Format or CSV).

## Get Started

- Call us to get a User Name and Password. This is different from what you may use for your My Account page with us.
- Log in with your User Name and Password at [americancentury.com/info/psa](http://americancentury.com/info/psa). At this time, you will choose your own password.
- Read and accept the Plan Sponsor Access terms and conditions.



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