# Online sponsor contributions job aid

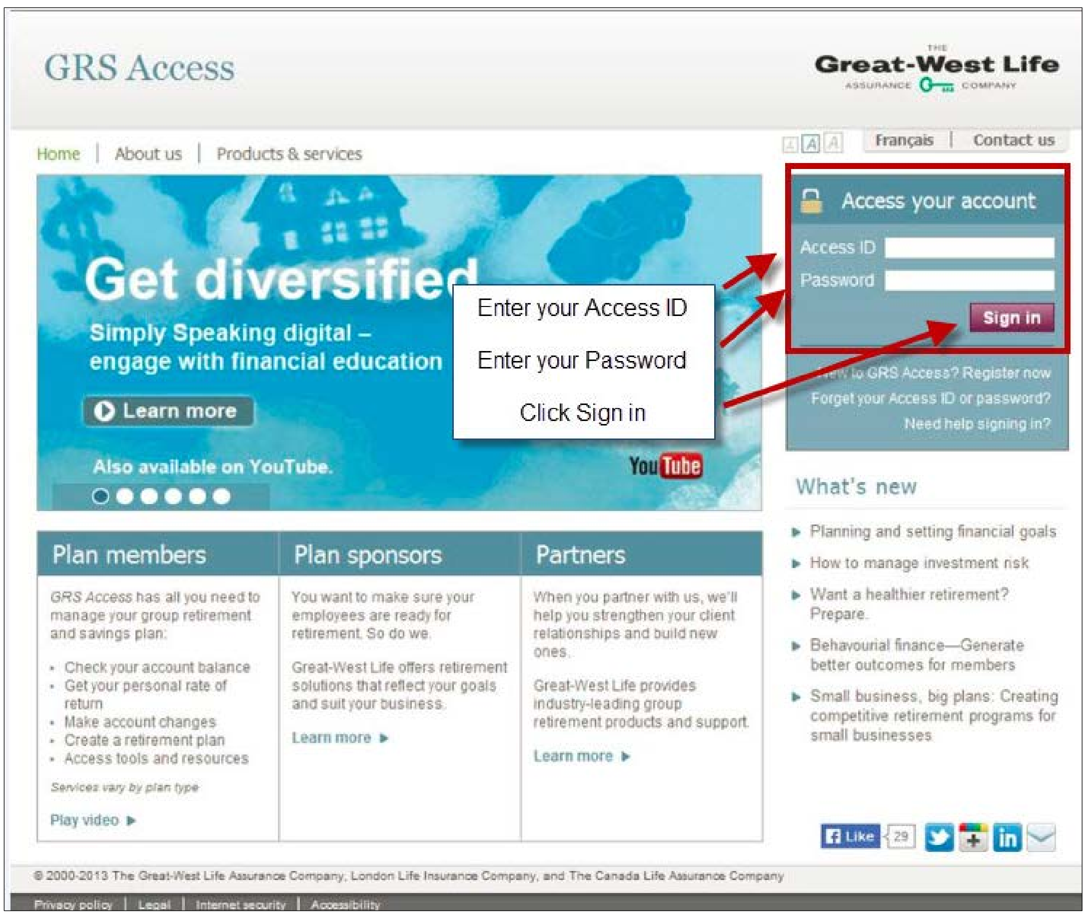
Through Great-West Life's online sponsor contributions feature, you can submit your contributions and approve bank withdrawals electronically for your company's group retirement and savings plan(s).

This service is recommended for clients or subgroups that submit contributions for 25 members or less and pay the full amount of the contribution when it's submitted (no credits are used). If you're not sure if you should use this service, contact your customer service specialist.

To use the online sponsor contribution feature, you must first complete an authorization form. If you haven't completed and sent us this form, contact your customer service specialist for help.

## How to access online sponsor contributions

1. Go to *GRS Access* (www.grsaccess.com)
2. Enter your **Access ID**
3. Enter your **Password**
4. Click **Sign in**



Once signed in:

5. Click **Menu** to open the menu items

From the **Client & member details** column:

6. Click **Administrative functions**

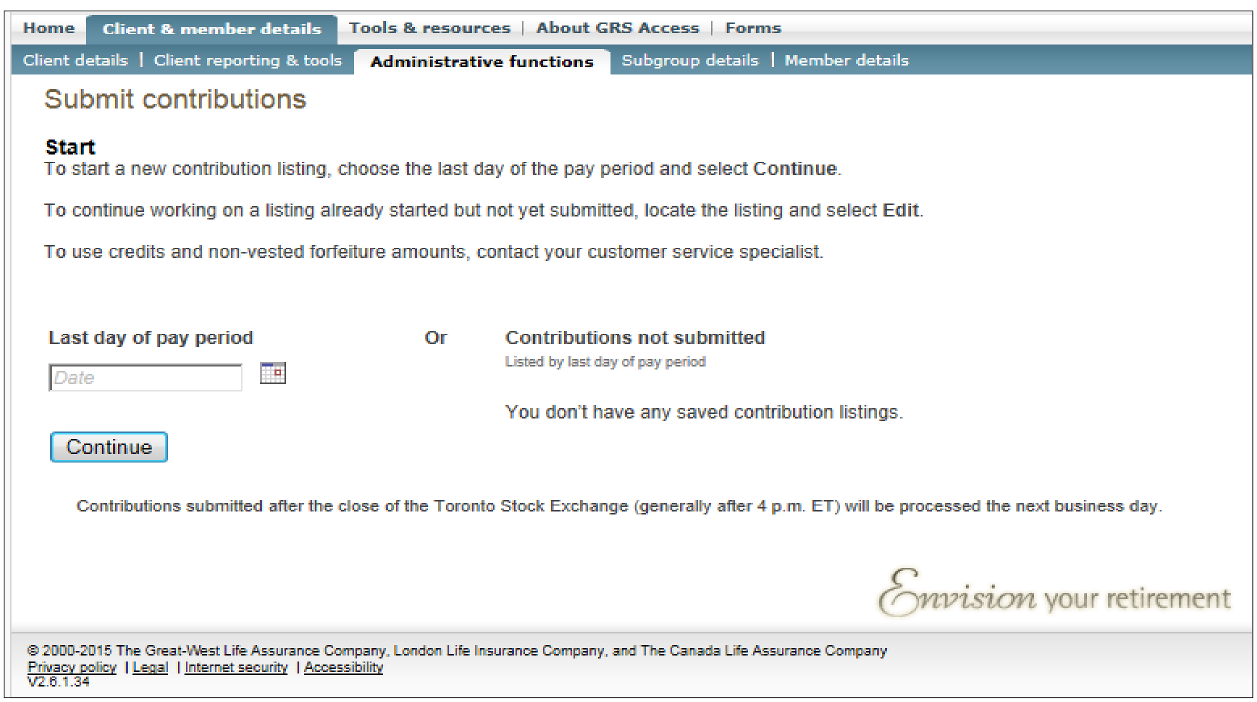

The **Administrative functions** screen appears.

7. Click **Submit contributions**

## How to submit contributions for members

From the **Start** screen of the **Submit contributions** page:

1. Enter the **Last day of the pay period** for the contribution you're submitting by using the calendar to select the date
2. Click **Continue**

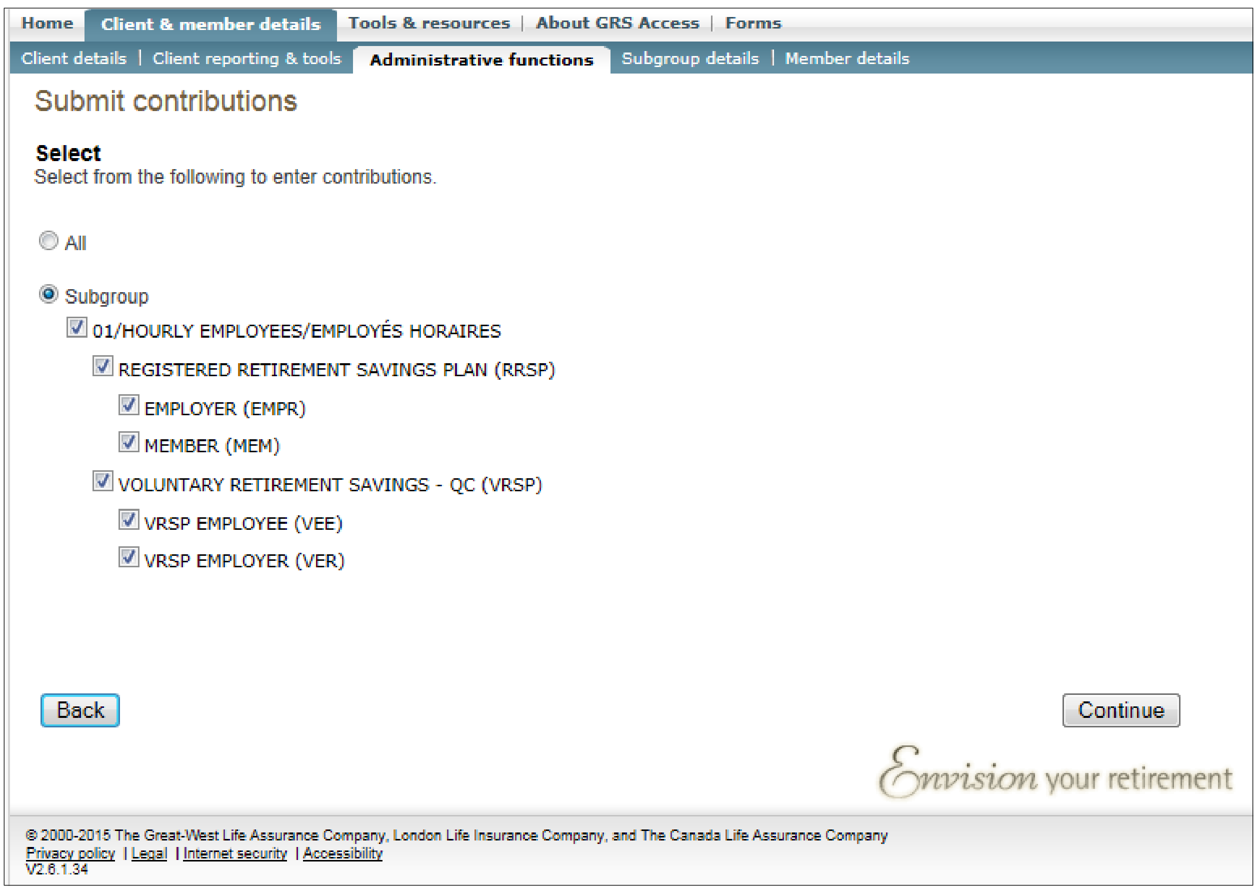


The **Select** screen appears.

3. Select **All** to submit a contribution for all available plans, or select **Subgroup** to submit a contribution for specific subgroups and/or plans
4. If you select **Subgroup**, check the appropriate subgroups, plans and accounts
5. Click **Continue**

**NOTE:**

- The **All** button will only be available if you have less than four plans or accounts.
- You can only select a maximum of four plans or accounts.
- **For the VRSP and PRPP only** – each January and February you will have to submit employee and employer contributions separately due to tax reporting requirements.



The **Enter contribution** screen appears.

6. Enter contributions for each active member in the appropriate plan/account column
    a. If you want to use the amounts that were saved previously, click **Use saved contribution amounts**
    b. If you want to delete information in the table and enter new information, click **Clear contribution amounts**
    c. If you want to customize your display, click **Customize display**. A box will appear with the following options:
        - Display social insurance number (SIN)
        - Display subgroup
        - Display certificate number

       Once you make a selection, the contribution screen will display that option.
    d. Scroll down to see more members, if applicable.
7. Click **Save** to save any unsaved contributions
8. When all contributions have been entered, click **Continue** to save contributions and to move to the next screen

**NOTE:**

- If you click the **Back** button, any unsaved contributions will be lost.
- A scroll bar will appear if the members listed can’t fit on the screen. However, the scroll bar won’t have a top arrow. If there are too many members, the scroll bar will become very small and can disappear under the header row. However, the scroll bar will appear if you use the bottom arrow or if you use the mouse to scroll.
- A single contribution amount cannot exceed $99,999.99.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Client details | Client reporting & tools | Administrative functions | Subgroup details | Member details

Submit contributions

**Enter contributions**
Contributions for pay period ending February 27, 2015.

To process contributions for members not listed here, contact your customer service specialist.

To enter a member's employment termination date or confirm a final contribution, select the member's name in the contribution listing.

Use saved contribution amounts | Clear contribution amounts

Customize display

| Member | Certificate | RRSP-EMPR | RRSP-MEM | VRSP-VEE | VRSP-VEEX | Total contribution |
|---|---|---|---|---|---|---|
| EDWARDS, CARL | 000000006 | $25.00 | $50.00 | | | $75.00 |
| GORDON, PIERRE | 000000002 | | | $25.00 | $25.00 | $50.00 |
| LAMBERT, ANNE | 000000003 | | | $0.00 | $0.00 | $0.00 |
| LOGANO, JOEY | 000000005 | $12.50 | $25.00 | | | $37.50 |
| MAROIS, LUC | 000000004 | $33.00 | $33.00 | $25.00 | $25.00 | $116.00 |
| TREMBLAY, RAYMOND | 000000001 | $50.00 | $100.00 | $0.00 | $0.00 | $150.00 |
| Totals by contribution type | | $120.50 | $208.00 | $50.00 | $50.00 | |
| | | | | | Total contributions | $428.50 |

Back If you select **Back,** unsaved contribution amounts will be lost. Save Continue

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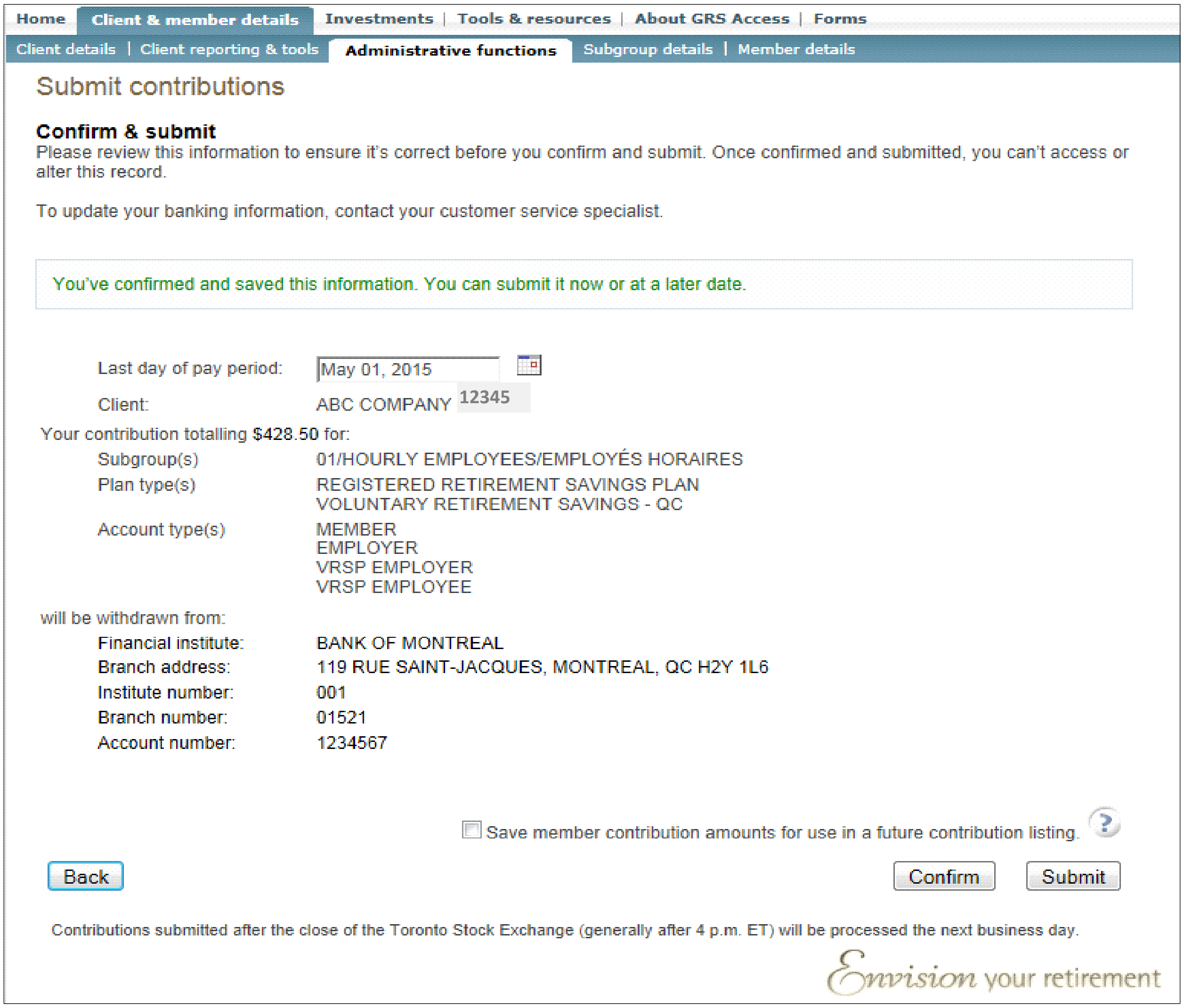
The **Confirm & submit** screen appears.

9. Confirm the information is correct.
    a. Click **Back** if the information isn't correct – the table on the previous screen opens so you can make your corrections
    b. If you want to save the member contribution amounts as a template to use next time you need to enter contributions, click the **Save member contribution amounts for use in a future contribution listing** check box
    c. Click **Confirm** to save your information.
    d. Click **Submit** to submit your contributions

**IMPORTANT:** You can't access or change the information once you've submitted it.

**NOTE:** If you have more than one bank account listed to withdraw funds, you won't be able to confirm or submit a contribution listing if the contribution amount is zero for any of the bank accounts.



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Submit contributions

**Confirm & submit**

Please review this information to ensure it's correct before you confirm and submit. Once confirmed and submitted, you can't access or alter this record.

To update your banking information, contact your customer service specialist.

You've confirmed and saved this information. You can submit it now or at a later date.

| | |
|---|---|
| Last day of pay period: | May 01, 2015 |
| Client: | ABC COMPANY 12345 |

Your contribution totalling $428.50 for:

| | |
|---|---|
| Subgroup(s) | 01/HOURLY EMPLOYEES/EMPLOYÉS HORAIRES |
| Plan type(s) | REGISTERED RETIREMENT SAVINGS PLAN<br>VOLUNTARY RETIREMENT SAVINGS - QC |
| Account type(s) | MEMBER<br>EMPLOYER<br>VRSP EMPLOYER<br>VRSP EMPLOYEE |

will be withdrawn from:

| | |
|---|---|
| Financial institute: | BANK OF MONTREAL |
| Branch address: | 119 RUE SAINT-JACQUES, MONTREAL, QC H2Y 1L6 |
| Institute number: | 001 |
| Branch number: | 01521 |
| Account number: | 1234567 |

Save member contribution amounts for use in a future contribution listing.

Back | Confirm | Submit

Contributions submitted after the close of the Toronto Stock Exchange (generally after 4 p.m. ET) will be processed the next business day.

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The **Print** screen appears.

10. Click **Print** to print the page
11. Click **Start another contribution listing** if you want to submit another contribution

**NOTE**: The cut-off time for submitting contributions and having them invested on the same business day is generally 4 p.m. eastern time. Contributions submitted after this time will be invested on the next business day. The withdrawal from the company's bank account will be initiated on the effective date of the contribution.

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## Submit contributions

### Print

Your contributions have been submitted. Please print a copy of this confirmation for your records.

If this contribution listing includes employment termination dates, complete a Member Termination form and submit it to your customer service specialist.

If you have any concerns about this transaction, contact your customer service specialist and quote the confirmation number.

| | |
|---|---|
| Client: | ABC COMPANY - 12345 |
| Confirmation number: | 32742885 |
| Contributions submitted on: | April 24, 2015 |
| Contributions processed on: | January 08, 2009 |
| Last day of pay period: | February 27, 2015 |
| Subgroup(s) | 01/ HOURLY EMPLOYEES/EMPLOYÉS HORAIRES |
| Plan type(s) | REGISTERED RETIREMENT SAVINGS PLAN<br>VOLUNTARY RETIREMENT SAVINGS - QC |
| Account type(s) | MEMBER<br>EMPLOYER<br>VRSP EMPLOYER<br>VRSP EMPLOYEE |
| Total contribution: | $428.50 |

Start another contribution listing

Print

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## How to inform us of a member’s termination date and indicate their final contribution

If a member’s employment has been terminated, you’ll need to advise us of their termination date and indicate when you’re submitting the member’s final contribution. The final contribution may be submitted after you’ve advised us of their termination date.

From the **Enter contributions** screen:

1. Select the member’s name
2. Use the calendar to fill in the **Employment termination date** field
3. Select the **Final contribution** check box if the contribution is the last one
4. Click **Save** to save any unsaved contributions
5. Click **Continue** to save the termination date/final contribution and move to the next screen

**NOTE:**

- If you click the **Back** button, any unsaved contributions will be lost.
- You must complete a member termination form once you’ve submitted your employee’s termination date.

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## Submit contributions

**Enter contributions**
Contributions for pay period ending February 27, 2015.

To process contributions for members not listed here, contact your customer service specialist.

To enter a member's employment termination date or confirm a final contribution, select the member's name in the contribution listing.

Use saved contribution amounts | ? | Clear contribution amounts

Customize display

| Member | Certificate | RRSP-EMPR | RRSP-MEM | VRSP-VEE | VRSP-VEEX | Total contribution |
|---|---|---|---|---|---|---|
| EDWARDS, CARL | 000000006 | $0.00 | $0.00 | | | $0.00 |
| Employment termination date : March 2, 2015<br>Final contribution ☑ | | | | | | |
| GORDON, PIERRE | 000000002 | | | $0.00 | $0.00 | $0.00 |
| LAMBERT, ANNE | 000000003 | | | $0.00 | $0.00 | $0.00 |
| LOGANO, JOEY | 000000005 | $0.00 | $0.00 | | | $0.00 |
| MAROIS, LUC | 000000004 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| TREMBLAY, RAYMOND | 000000001 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| **Totals by contribution type** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | | | | | **Total contributions** | **$0.00** |

Back If you select **Back,** unsaved contribution amounts will be lost. Save Continue

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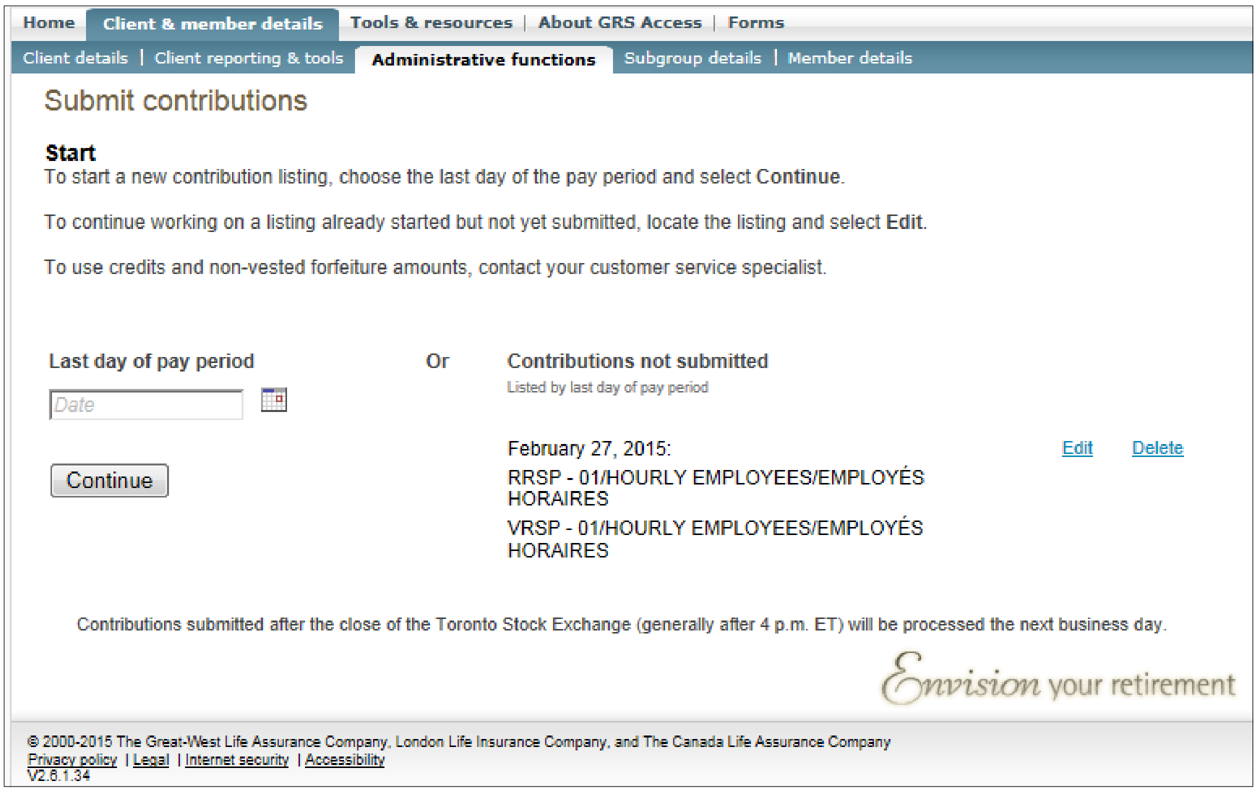
# How to update contributions that haven’t been submitted

If you previously saved a contribution listing but you didn’t submit it, and you need to make updates to the listing:

From the **Start screen** of the **Submit contributions** page:

1. Click **Edit** beside the listing you want to update



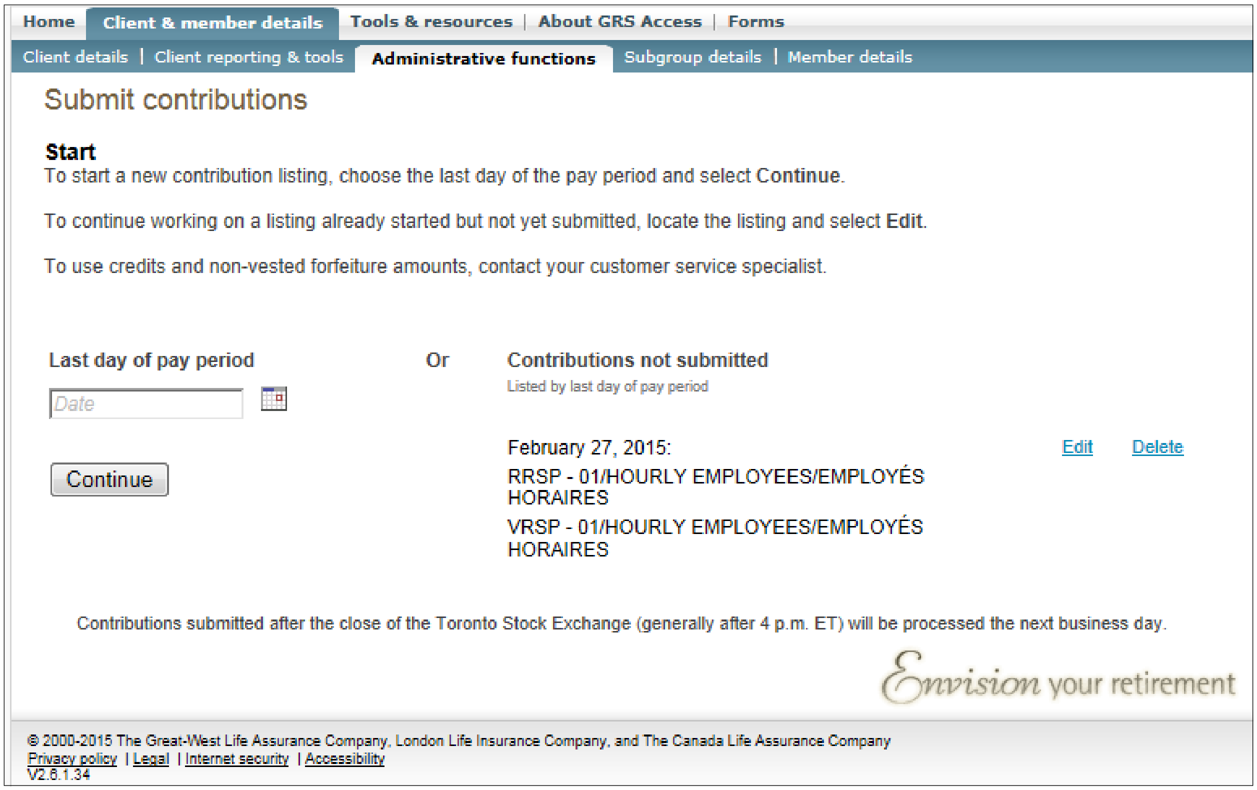

2. Enter updates
3. Click **Save**
4. Click **Continue** to move to the next screen

# How to delete contributions that haven’t been submitted

If you previously saved a contribution listing but you didn’t submit it, and you need to delete the listing:

From the **Start** screen of the **Submit contributions** page:

1. Click **Delete** beside the listing you want to delete




2. A pop-up window appears with the question: **Are you sure you want to delete the contribution listing?**
3. Click **Yes** to delete the listing – you’ll be returned to the existing page with the listing removed from the page, or
   Click **No** – you’ll be returned to the existing page with the listing remaining on the page
4. Start a new contribution or edit a contribution that you haven’t submitted

**Questions and answers**
**Online sponsor contributions**

1: How do I send the client authorization form?
You can use mail, fax or *GRS Access* File Transfer to send us the client authorization form along with a void cheque. The form must be completed and signed by a person authorized to sign on behalf of the company. The client authorization form is available on *GRS Access* under Forms > Printable Forms > Employer/Plan Sponsor Forms.

2: How do I update banking information?
To update your banking information, you'll need to submit the client authorization form along with a new void cheque. The client authorization form is available on *GRS Access* under Forms > Printable Forms > Employer/Plan Sponsor Forms.

3: What if I'm using a different bank account for each subgroup?
You'll need to complete a client authorization form and provide a void cheque for each bank account that you're using to submit contributions. You must indicate on the authorization which subgroup the bank account applies to. Note: we can only accommodate one bank account per subgroup.

4: Can I submit contributions for a future date and request the amount be debited on that date?
No, you can't submit contributions and debit the amount on a future date.

5: Some members are missing on the Enter contributions page. How do I add a member?
Contact the customer service specialist to determine if the member has been terminated or if it's a new member and their application hasn't been received or processed yet.

6: How long does it take to add a new employee to the contribution listing?
As soon as a member is added to the plan (by the customer service specialist or using Enrolment Express), the member will appear on the contribution listing. Normally, it takes two business days to add a new plan member once we've received the required information; however, you can contact the customer service specialist to see if the employee can be added sooner.

7: Can I upload a contribution file?
No. You can't upload a contribution file at this time.

8: When will funds be debited from my bank account?
The withdrawal from the company's bank account will be initiated on the effective date of the contribution. The debit from your bank account will generally take two to five business days.

9: I've submitted a contribution and realized that I made a mistake. How do I correct it?
Contact the customer service specialist and provide details of the error.

10: How can I get details of a contribution that has been submitted?
There are several ways to review contributions after they've been submitted:

- Summary by subgroup and account – use the Contribution inquiry report on *GRS Access*, which can be found under Client & member details > Client reporting & tools, to create the summary report. The report breaks down totals by subgroup and account.
- Specific member – on *GRS Access* select specific member and go to Activity reports
- All members – your next client statement will summarize by member for the statement period
- Need more detail? Contact your customer service specialist for a report

11: Can I use any forfeiture or surplus funds towards the online contribution?
No. You'll need to provide the customer service specialist with the contribution listing and/or breakdown as well as how much you want deducted from your forfeiture/surplus account.

12: Where do I get a member termination form?
You can get a member termination form from *GRS Access* under Forms > Printable Forms > Member Request/Change Forms > Notice of termination.

13: I submitted an employment termination date for an employee but it's not showing on the Enter contribution screen.
Contact the customer service specialist to confirm the termination date has been received.

14: Who do I contact if I have any questions or need assistance?
Contact the customer service specialist for assistance.