
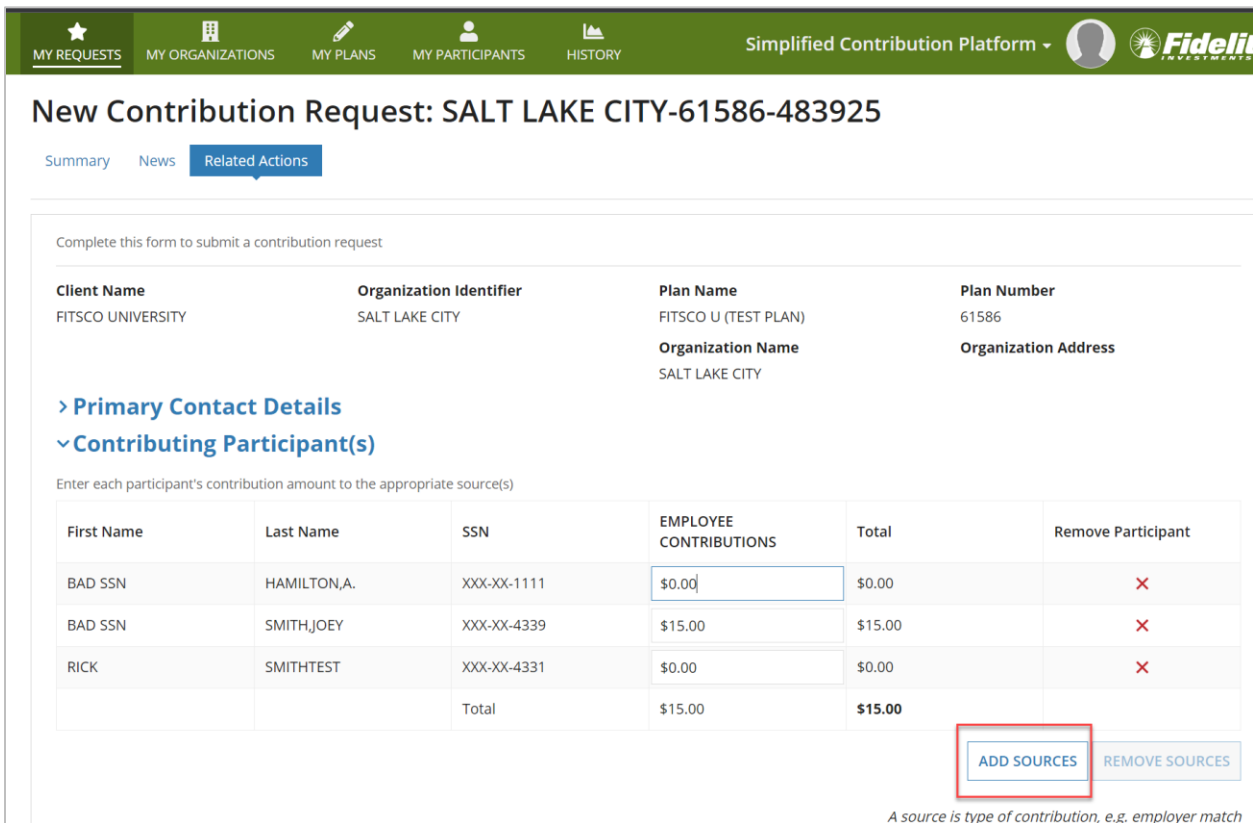


Steps for Adding a Roth Source

1. Log into the [Simplified Contribution Platform](#) to make a contribution request.

- Under "My Contributions" Click on the long blue number.
- Navigate to the top right corner and click 
- Scroll to the bottom right of your employee list and click on the "Add Sources" box.



Complete this form to submit a contribution request

Client Name FITSCO UNIVERSITY	Organization Identifier SALT LAKE CITY	Plan Name FITSCO U (TEST PLAN)	Plan Number 61586
		Organization Name SALT LAKE CITY	Organization Address

> Primary Contact Details
 v Contributing Participant(s)

Enter each participant's contribution amount to the appropriate source(s)

First Name	Last Name	SSN	EMPLOYEE CONTRIBUTIONS	Total	Remove Participant
BAD SSN	HAMILTON,A.	XXX-XX-1111	\$0.00	\$0.00	×
BAD SSN	SMITH,JOEY	XXX-XX-4339	\$15.00	\$15.00	×
RICK	SMITHTEST	XXX-XX-4331	\$0.00	\$0.00	×
		Total	\$15.00	\$15.00	

ADD SOURCES REMOVE SOURCES

A source is type of contribution, e.g. employer match

2. Next, the system will ask you if you want to proceed.

All unsaved data will be lost. Do you want to proceed?

- Select "**Yes.**"
 - **Important:** any contribution values changed on the previous page will be removed, requiring you to re-enter them before submitting your contribution.
- The "Add Contribution Sources" page will display a list of available sources from which you may choose to add.
- Add "Roth Deferral" or "Roth Catch-up" contribution sources as needed.
- Click on the check box to the left of the Roth Source you want to add; then click the "Add" button on the bottom right of the screen to proceed.

Add Contribution Sources

Please select the sources you want to add to the contribution request.

<input type="checkbox"/> Source Name	↓ Source Description
<input checked="" type="checkbox"/> ROTH DEFERRAL	EE
<input type="checkbox"/> ROTH CATCH-UP	EE

3. After clicking the "Add" button, new categories will display as an option going forward on your contribution screens. You are now ready to complete your contributions!

Complete this form to submit a contribution request

Client Name FITSKO UNIVERSITY	Organization Identifier SALT LAKE CITY	Plan Name FITSKO U (TEST PLAN)	Plan Number 61586
		Organization Name SALT LAKE CITY	Organization Address

[> Primary Contact Details](#)
[v Contributing Participant\(s\)](#)

Enter each participant's contribution amount to the appropriate source(s)

First Name	Last Name	SSN	ROTH DEFERRAL	EMPLOYEE CONTRIBUTIONS	ROTH CATCH-UP	Total	Remove Participant
BAD SSN	HAMILTON,A.	XXX-XX-1111	\$2.00	\$0.00	\$0.00	\$2.00	✗
BAD SSN	SMITH,JOEY	XXX-XX-4339	\$0.00	\$15.00	\$0.00	\$15.00	✗
RICK	SMITHTEST	XXX-XX-4331	\$0.00	\$0.00	\$0.00	\$0.00	✗
		Total	\$2.00	\$15.00	\$0.00	\$17.00	

[ADD SOURCES](#) [REMOVE SOURCES](#)

A source is type of contribution, e.g. employer match

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