

eContributions

User Manual



Dear Plan Administrator,

Thank you for investing in the mutual funds offered by PFS Investments Inc. We are committed to building lifetime client relationships by helping you reach your financial goals.

This is your eContributions User Manual with Frequently Asked Questions (FAQ).

If you have any questions regarding this User Manual or eContributions in general, please contact our Client Service Center at (800) 544-5445. Our Client Service Representatives are available to assist you Monday through Friday from 8:00 a.m. to 8:00 p.m. ET.

Sincerely,

Primerica Shareholder Services

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Initial Setup

- Step 1: Please go to <https://econtrib.bnymellon.com/econtrib/>.
- Step 2: Select **New Web User Request Forms** under the **Forms** tab on the home page (bottom of the web page).
- Step 3: Under **Form Name** Select **eContributions Services Employer Application (POL-30)** and Open Form.

PFS Investments Inc.**eContributions Services Employer Application**

4 | ELECTRONIC FUNDS TRANSFER AUTHORIZATION

If you would like to facilitate the delivery of Plan contributions by authorizing Primerica Shareholder Services to initiate debits against your company's designated bank account in accordance with your Plan Contribution Instructions, please provide the requested information below. Please note that your bank must be a member of the Automated Clearing House (ACH). Allow up to 15 business days for PSS to set up your bank account instructions.

NOTE: By completing this section, your company will be able to authorize plan contributions directly through eContributions and will not need to provide separate payment via check or Federal wire.

Company Name: _____ Timer / Plan ID: _____

ACCOUNT INFORMATION

☐ Checking Account ☐ Savings Account

Bank Account Owner/Employer Name: _____ Bank Name: _____

Bank Routing Number: (9 digits) _____ Bank Account: _____

NOTE: Tape a voided or copy of voided, preprinted check or preprinted savings account deposit slip here. Copy of a voided check is **recommended** for processing.

Phone
Street Address
City, ST ZIP

Example of POL-30

PFS Investments Inc.**eContributions Services Employer Application**

1 | COMPANY INFORMATION

_____, ("Employer") requests the ability to deliver Plan Contribution Instructions (defined below), which accompany monetary contributions relating to the retirement plan identified below, to Primerica Shareholder Services via the PSS eContributions password protected website ("eContributions").

Total number of employees currently eligible to participate in retirement plan: _____

2 | TYPE OF RETIREMENT PLAN MAINTAINED BY THE EMPLOYER

☐ 403(b) Plan ☐ 403(b) ORP Texas Only ☐ PDP ☐ SAR SEP ☐ SEP IRA ☐ SIMPLE IRA

3 | SIGNATURES

IN CONSIDERATION OF PRIMERICA SHAREHOLDER SERVICES' ("PSS") agreement to accept Plan Contribution Instructions electronically via the eContributions website, Employer agrees to the following:

The term "Plan Contribution Instructions" shall mean instructions from Employer to PSS to invest specified monetary amounts in pre-established accounts of participants of the above-identified plan with such instructions being transmitted by the Employer by the completion of a pre-populated online form on the password protected website ("eContributions").

Employer shall designate individuals as authorized users of eContributions who will then have the ability to access the eContributions website to submit Plan Contribution Instructions and update employer address and other contact information (such as phone number and email address) for the retirement plan. Employers that submit monetary contributions by ACH (Automated Clearing House) will be able to use eContributions to transmit the Plan Contribution Instructions. Upon PSS' receipt of this Application, a self-registration link will be sent to the email address on this form. When an authorized individual user registers via the self-registration link, a unique eContributions user name and password will be established for that individual. It is the sole responsibility of the Employer and authorized users to control the security and confidentiality of the user name(s) and password(s), and Employer acknowledges and agrees that PSS may rely upon any Plan Contribution Instructions being transmitted under a user name and password issued to Employer or any authorized users. Employer is solely responsible for the actions of its authorized users.

The undersigned Employer directs PSS to use electronic transmissions of Plan Contribution Instructions submitted via the eContributions website, remitted by Individuals designated by Employer to use eContributions, to invest monetary contributions to accounts of participants in the above identified retirement plan. Employer is solely responsible for transmitting accurate Plan Contribution Instructions to PSS, and for bearing the cost of adjusting a participant's account should any errors occur as a result of Employer's Plan Contribution Instructions. If Employer is transmitting Plan Contribution Instructions for a 403(b) salary deferral only plan, Employer further represents that it has entered into salary deferral agreements with its employees for whom it is transmitting Plan Contribution Instructions.

Employer is solely responsible for verifying the accuracy of transactions entered through eContributions. PSS will make available through eContributions a Contribution Remittance Report that will serve as confirmation of the contributions allocated to the plan participants' accounts. Employer is solely responsible for notifying PSS of any errors or inaccuracies relating to information that is contained in, or omitted from, the Contribution Remittance Reports, including errors or inaccuracies arising from any transactions entered in eContributions.

Employer shall indemnify and hold harmless PFS Investments and its service provider, Primerica Shareholder Services, BNY Mellon, and their officers, employees, agents and successors from and against any and all liability, loss, suits, claims, costs, damages and expenses of whatever amount and whatever nature, including without limitation, reasonable attorneys' fees, any indemnitee may sustain or incur by reason of, in consequence of, or arising from, or in connection with, or in relation to an indemnitee acting or forbearing from taking action in good-faith reliance on Plan Contribution Instructions from Employer or its Authorized Users.

Employer acknowledges and agrees that Employer's and Authorized Users' access to and use of eContributions is subject to the eContributions website Terms of Use, including the Dispute Arbitration Agreement.

Employer acknowledges and agrees that PSS may, for any reason, at any time, upon notice to Employer discontinue accepting Plan Contribution Instructions via the eContributions website.

EMPLOYER SIGNATURE (Authorized signer's signature representing the employer / company)

Authorized Officer Signature: _____ Date: _____

Authorized Officer Name: (please print) _____ Title: _____

Authorized Officer E-mail Address: _____ Authorized Officer Mobile Number: _____

NOTE: This number will be used to receive account reset notifications

Initial Setup (Continued)

Step 4: Complete Form POL-30, Print, Sign, and mail or fax the application to:

Regular Mail

Primerica Shareholder Services
P.O. Box 534473
Pittsburgh, PA 15253-4473

Overnight Mail

Primerica Shareholder Services
Attention: 534473
500 Ross Street 154-0520
Pittsburgh, PA 15262

Fax: 844-568-3809

Step 5: Once the completed POL-30 form is received and processed (this may take up to 10 business days depending on the submission process used), an email will be generated and sent to the email address provided on Form POL-30.

Step 6: This email is a Self-Registration email from donotreply@bnymellonedu.com. Within the email content, click on the **“click here to register for eContributions”** hyperlink.

Please see the example of the email content you will receive from donotreply@bnymellon.com to self-register for eContributions.

Welcome to Primerica eContributions self-registration!

You have been identified to receive online access to the Primerica Shareholder Services eContributions website. This online tool can be used for electronic transmission of your employees' retirement plan contribution instructions to Primerica Shareholder Services.

What you will need:

- * your email address used to request access
- * your Plan Id/Timer number

[Click here to register for eContributions](#)

If you did not request this access please notify Primerica Shareholder Services at (800) 544-5445.

Thank you,
Primerica Shareholder Services
eContributions

Once you click on “Click here to register for eContributions”, you will see the Self Registration screen to register.

Self-Registration

1. Enter your first and last name.
2. Enter your phone number (mobile number preferred)
3. Enter your Plan ID
4. Enter the e-mail that was provided when submitting POL-30
5. Click on the “Continue” button.



Get Online Access

Accept Agreement ☒ Identify Account ☒ Confirm Identity ☐ Create Login ☐

Identify Your Account
To get online access, you must identify your account.

First Name * Last Name *

Country Code * United States (1) Phone *

Country Code * United States (1) Mobile Number *

Plan ID *

Email *

This email address will be used for occasional communications from the system.

Terms of Use | Cookie Policy | Privacy | Manage Cookies

Copyright © 2021 Primerica

How to Contact Us

By Mail
Primerica Shareholder Services
P.O. Box 9662
Providence, RI 02940-9662

By Phone
To speak with a Client Service Representative, please dial 1-800-544-5445.

eContributions Enrollment
If you need help with the eContributions Enrollment process, please contact our Client Service Representative at 1-800-544-5445. If you have not received the self-registration e-mail, please [click here](#) to begin the self-registration process.

eContributions Access
If you are having trouble logging into or navigating the eContributions site, please contact a Client Service Representative at 1-800-544-5445.

If you have created a user name and password for eContributions, please [click here](#). If you have forgotten your password, please [click here](#) and follow the steps to reset your password. For requests involving forgotten passwords, or accounts that have been locked out from incorrect login attempts, please contact 1-800-332-4590 and select Option 7 for assistance.

Get Online Access

Accept Agreement ☒ Identify Account ☐ Confirm Identity ☐ Create Login ☐

Accept the Agreement

These Terms were last amended in June 2021.

These Terms of Use ("Terms") are a binding agreement between you and Primerica Shareholder Services, Inc. ("PSS"). By accessing, browsing, and/or requesting account information or transactions through this PSS eContributions website ("the Site" or "PSSeContributions"), you acknowledge that you accept and agree to be bound by these Terms without modification. These Terms are in addition to any other agreements between you and PSS and the terms do not supersede those existing agreements. PSS may modify these Terms at any time and without prior notice to you. Your continued use of the Site after the Terms are amended will constitute acknowledgement and acceptance of the changes.

THESE TERMS AND CONDITIONS SPECIFICALLY APPLY TO USERS IN THE UNITED STATES. THESE TERMS AND CONDITIONS ARE LEGALLY BINDING. PLEASE READ THEM CAREFULLY.

Authorized Users

PSSeContributions is available to authorized users ("Authorized Users") of Employers who sponsor a retirement plan for which PSS Investments Inc. ("PFSI") acts as custodian and PSS acts as servicing agent.

To obtain access to PSSeContributions, the Employer must designate an Authorized Officer ("Authorized Administrator") to access and administer PSSeContributions on behalf of the Employer. The Authorized Administrator is an Authorized User and may designate additional Authorized Users who have been authorized by the Employer. It is the responsibility of the Authorized Administrator, on behalf of the Employer, to designate current Authorized Users and to notify PSS if a user is no longer authorized or if a previously authorized user's site access should be revoked. Each Authorized User must register with PSSeContributions for general site access.

☐ I have read and understood the agreement.
You can proceed only if you accept the terms and conditions

How to Contact Us

By Mail
Primerica Shareholder Services
P.O. Box 9662
Providence, RI 02940-9662

By Phone
To speak with a Client Service Representative, please dial 1-800-544-5445.

eContributions Enrollment
If you need help with the eContributions Enrollment process, please contact our Client Service Representative at 1-800-544-5445. If you have not received the self-registration e-mail, please [click here](#) to begin the self-registration process.

eContributions Access
If you are having trouble logging into or navigating the eContributions site, please contact a Client Service Representative at 1-800-544-5445.

If you have created a user name and password for eContributions please [click here](#). If you have forgotten your password please [click here](#) and follow the steps to reset your password. For requests involving forgotten passwords, or accounts that have been locked out from incorrect login attempts, please contact 1-800-332-4590 and select Option 7 for assistance.

After selecting “continue” from the Welcome to eContributions Self Registration page, the “Create Your Profile” page follows as displayed above. Complete your online profile by following the steps below.

STEPS:

1. Enter First Name
2. Enter Last Name
3. Enter Office Phone
4. Enter Mobile Phone
5. The Email Address is masked.
6. Create a login ID
7. Create a Password and Confirm
8. Select “Continue”

Logging In

After you select continue, you will see the “Welcome to eContributions” page below. In addition, you will see the upper left hand corner of your screen a message stating the following, “**You are registered for online access successfully**”



Welcome to eContributions

eContributions is a unique online tool that allows you to electronically transmit your employees' retirement plan contribution instructions to Primerica Shareholder Services. eContributions enables you to remit participant contributions instructions online and receive immediate receipt of instructions.

To sign up, please complete an eContributions Services Employer Application for your Employer Sponsored Retirement Plan or contact our Client Services Representative at 1-800-544-5445 for additional assistance.

Forms

[All Forms](#)

Let Us Help You

How to Contact Us

By Mail

Primerica Shareholder Services
P.O. Box 534473
Pittsburgh, PA 15253-4473

By Phone

To speak with a Client Service Representative, please dial 1-800-544-5445.

User ID
Enter User ID

Password
Enter Password

Log In

[Forgot Password](#) | [Forgot User ID](#)

- STEP 1: Enter your login ID and password you have just created.
- STEP 2: Select Login.
- STEP 3: Next, you will be taken to a page stating that you should expect an email in 5 - 30 seconds after you click continue to verify your identity and confirm email: (see below).
- STEP 4: And then select “Continue”.

eContributions

Identity Verification

We need to verify your identity because you are attempting to access your account from a computer or device we do not recognize.

Confirm Email Address:

To confirm that you can be reached for authentication at this email address, click Continue.

su*****@b*****.com

(Expect an email in 5-30 seconds after you click "Continue")

Cancel

Continue

After you select continue, the following page will ask for a confirmation code.

eContributions

Verify Identity- Authentication Code

We are now sending an email containing a confirmation code to the following email address you selected.

Selected email address:

su*****@b*****.com

Enter the confirmation code below. After entering the confirmation code, you will be authorized to continue.

If you didn't receive the email within 60 seconds or had other problems, [Click here.](#)

Confirmation Code:

Would You Like Us to Remember this Computer?

☐ Yes. I plan to use this computer in the future to access my account.

☒ No.

eContributions

Your One Time Password

Dear User,

Your One Time Password is: **131246**

Please enter this One Time Password within the next 20 minutes to unlock your account and continue to access your account. Remember you can request an additional temporary authentication code if you are not able to log in.

Thank you.

You will then simultaneously receive an email from PostMaster@domain.invalid with the subject "One Time Password".

Logging In (Continued)

STEP 5: Open email from PostMaster@domain.invalid with the subject “One Time Password” and then enter the one time code in the confirmation code box.

eContributions

Verify Identity- Authentication Code

We are now sending an email containing a confirmation code to the following email address you selected.

Selected email address:

su*****@b*****.com

Enter the confirmation code below. After entering the confirmation code, you will be authorized to continue.

If you didn't receive the email within 60 seconds or had other problems, [Click here.](#)

Confirmation Code:

Would You Like Us to Remember this Computer?

☐ Yes. I plan to use this computer in the future to access my account.


☒ No. This is a public computer or one I do not plan on using often to access my account.

Select if you would like the website to remember this computer (Yes for private access / No for public access).

NOTE: If NO is selected, the user will be prompted to provide a security code the next time they attempt to log in.

STEP 6: And then select “Continue”.

After selecting “Continue”, you will see the Self-Certification page. This page will automatically be generated at every login session.


PRIMERICA

eContributions
 Today is Mon, Oct 30, 2017 08:22 AM
 Your last login was Mon, Oct 30, 2017 07:38 AM

Self-Certification


Check the box below to complete the login process.

☐ **Self-Certification of Primary Authorized User (Plan Administrator or Employer Authorized Officer)**

I certify that as the Plan Administrator or Employer Authorized Officer, I am currently authorized to use eContributions on behalf of our Employer Sponsored Plan. There have been no updates or changes to my designation as Primary Authorized User. If any secondary authorize user(s) have been changed, revoked, or otherwise prohibited, I acknowledge that as the Plan Administrator or Employer Authorized Officer, I am responsible for making such changes. I am also acknowledging the [terms of use agreement](#) and understand that it is a binding contract between me and PFS Investments Inc and its affiliates.


- STEP 1:** Check the “Self-Certification” box certifying that they are an authorized user and able to act on behalf of the plan in regards to submitting listbill contributions.
- STEP 2;** Once selected, you will see the next page displaying “Your Plan(s)”. This is the dashboard whenever you first login.

[Home](#)
[Profile](#)
[User Administration](#)
[Contact Us](#)
[Logout](#)




PRIMERICA

eContributions
 Today is Fri, Mar 09, 2018
 Your last login was Thu, Mar 08, 2018 12:24 PM

Welcome Dana Atchison!

 Pending Contributions

Your Plans

	Plan / Timer Id	Plan Name	Last Submitted	Listbills	Remitters
	DA001	Parson Gifts			

Forms

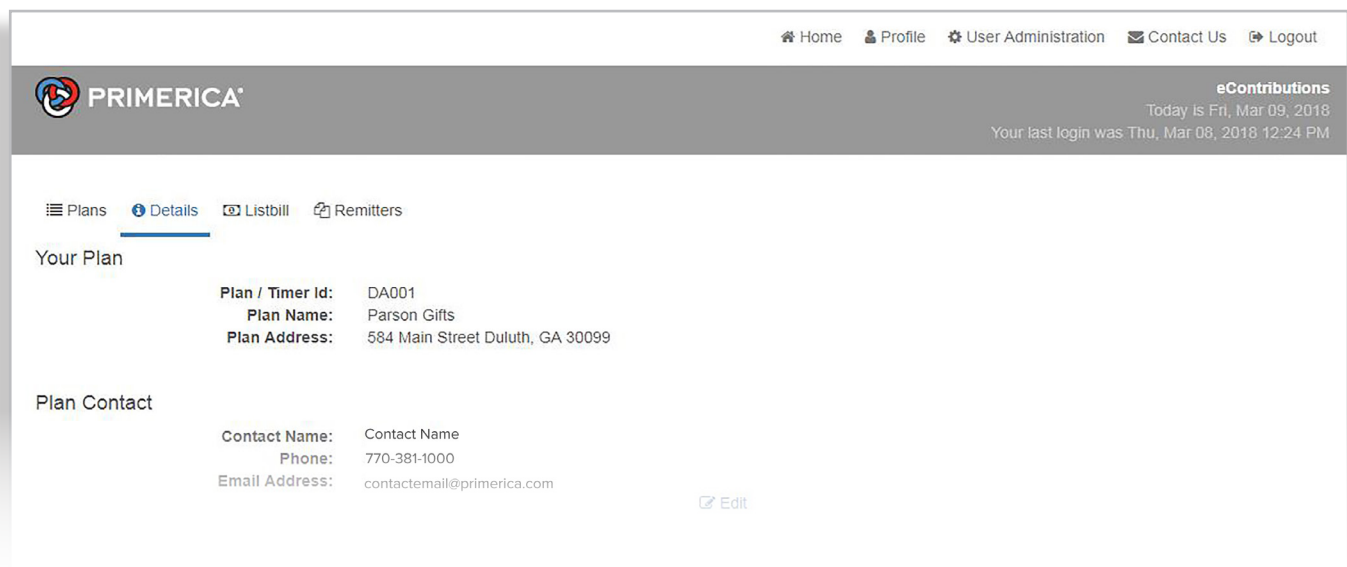
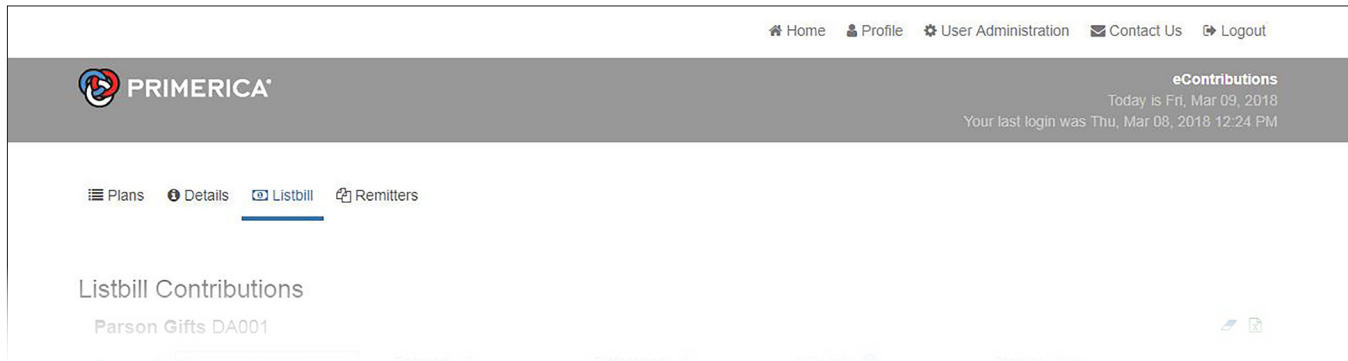
- New Web User Request Forms
- Employer Forms
- Employer Plan Documents

Let Us Help You

- Most Frequently Asked Q&A
- eContributions User Manual
- Security of Online Account Information

Navigating through eContributions

- Selecting “Plan / Timer ID” or “Listbills” from the dashboard will take you to the List Bill Contributions page.
- Selecting “Plan Name” will take you to Plan Details and Plan Contract.



NOTE: Only the Authorized Plan Administrator can update / change the Plan's address and Plan's contact information.

Updating Plan Information

- If Plan Administrator would like to edit Plan Details, select the Edit button on the Plan Details screen and the following screen will show in edit mode.

The screenshot shows the 'Your Plan' edit screen in the PRIMERICA eContributions system. The top navigation bar includes links for Home, Profile, User Administration, Contact Us, and Logout. The PRIMERICA logo is on the left, and the eContributions header on the right shows the date (Fri, Mar 09, 2018) and the last login time (Thu, Mar 08, 2018 12:24 PM). The main content area has tabs for Plans, Details (selected), Listbill, and Remitters. Under 'Your Plan', there are fields for Plan / Timer ID (DA001), Plan Name (Parson Gifts), Plan Address, and three Address Lines (584 Main Street, Duluth, GA 30099). Below this is the 'Plan Contact' section with fields for Contact Name, Phone (770-381-1000), and Email Address (contactemail@primerica.com). A 'Save' button is at the bottom right. The footer contains links for Forms (New Web User Request Forms, Employer Forms, Employer Plan Documents) and Let Us Help You (Most Frequently Asked Q&A, eContributions User Manual, Security of Online Account Information).

- Selecting the “Remitters” from the dashboard will take you to “Your Plan Remitters” page.

The screenshot shows the 'Your Plan Remitters' page for 'Parson Gifts DA001'. The top navigation bar is the same as the previous screen. The PRIMERICA logo is on the left, and the eContributions header on the right shows the date (Mon, Mar 12, 2018) and the last login time (Mon, Mar 12, 2018 11:29 AM). The main content area has tabs for Plans, Details, Listbill, and Remitters (selected). Under 'Your Plan Remitters', there is a table with columns: Submit Date, Total Contribution, Total Employee Contribution, Total Employer Contribution, and Submitted By. The table shows one entry for 3/12/2018 01:01:51 PM with a total contribution of \$100.00, employee contribution of \$50.00, and employer contribution of \$50.00, submitted by pss222a. The footer contains links for Forms and Let Us Help You.

Submit Date	Total Contribution	Total Employee Contribution	Total Employer Contribution	Submitted By
3/12/2018 01:01:51 PM	\$100.00	\$50.00	\$50.00	pss222a

Understanding Your Plans

Pending Contributions:

This flag icon indicates listbills that have been entered and saved but not yet submitted for processing.

The screenshot shows the PRIMERICA eContributions web application. At the top, there is a navigation bar with links for Home, Profile, User Administration, Contact Us, and Logout. Below this, a header section displays the PRIMERICA logo, the user's name 'Dana Atchison', and the current date and time. The main content area is titled 'Your Plans' and contains a table with columns for Plan / Timer Id, Plan Name, Last Submitted, Listbills, and Remitters. A red box highlights the 'Pending Contributions' flag icon in the top right corner. Red lines connect this flag to the 'Last Submitted', 'Listbills', and 'Remitters' columns, which are also highlighted with red boxes. The 'Last Submitted' column shows the date '03/12/2018 01:01:51 PM'. The 'Listbills' column shows a listbill icon. The 'Remitters' column shows a remitters icon.

Plan / Timer Id	Plan Name	Last Submitted	Listbills	Remitters
DA001	Parson Gifts	03/12/2018 01:01:51 PM		

Last Submitted:

This list the date that the last listbill was submitted for processing.

Listbills:

This is the current listbill for editing and submission for the plan.

Remitters:

This is to view previously submitted remitters that we processed.

Understanding Your Listbill Contributions

PRIMERICA eContributions
Today is Mon, Aug 21, 2023
Your last login was Mon, Aug 21, 2023 12:58 PM

Plans Details Listbill Remitters

1 Listbill Contributions
NEW PLAN Q52UW

2 Target: \$ 500.00 **3** Entered: \$500.00 **4** Difference: \$0.00 **5** ACH Info: **6** Status: Complete [Create New](#)

Please note that new participants will not show in your list until you click the Create New button above.

Participant Name	Tax ID	7 Active?	Account Number	Employee Contribution	Employer Contribution	Total Contribution
JONES AL	xxx-xx-9999	<input checked="" type="checkbox"/>	xxxxx3702	\$100.00	\$200.00	\$300.00
JONES SA	xxx-xx-9999	<input checked="" type="checkbox"/>	xxxxx3695	\$125.00	\$75.00	\$200.00
Totals:				\$225.00	\$275.00	\$500.00

9 [Additional Instructions](#) [Cancel](#) [Save](#) [Submit](#)

1. Plan Name and Plan ID are listed on upper left.
2. Target Amount (\$): this is the total dollar amount of employee and employer contributions for this remitter period.
3. Entered Amount (\$): this is the total dollar amount entered as employee and employer contributions.
4. Difference Amount (\$): this is the difference between Target dollar amount (2) and Entered dollar amount (3).
5. ACH Info: this displays the banking information on file with PSS in order to ACH the Listbill Contributions and credit employee's account. Only PSS can change or update this information. Request for bank changes has to be submitted on the PFSI-EACH form.
6. Status: this displays whether this is a new Listbill or an existing Listbill currently being worked on.
7. Active: you can select participants who are contributing for that pay period or de-select participants who are NOT contributing for the pay period being Entered.
8. Select green check mark to save each participants contribution.
9. Additional Instructions: This box is to add additional instructions the Plan Administrator would like the processor to know. For example, adding a new participant who is not currently in the eContributions system. Plan Administrator can include participant's name, Social Security Number, account number, employee and employer contribution amount. In addition, please include instructions of payroll date and when to deduct a separate ACH for the new participant's contribution. Please note, if a participant is not in the eContribution system, they cannot be added to the current listbill unless done manually using the additional instructions box. Once a participant's application is processed, they will automatically be added to your next listbill cycle.

Understanding Your Plan Remitters

Submit Date:

This will show all previously submitted listbills that have been processed. It will also include a breakdown of the amounts, the date and time

Total Contribution:

This will show the total contribution that was submitted for processing for that particular listbill.

Total Employee Contribution:

This shows the total employee contributions that were submitted for processing for that particular listbill.

Submit Date	Total Contribution	Total Employee Contribution	Total Employer Contribution	Submitted By
3/12/2018 01:01:51 PM	\$100.00	\$50.00	\$50.00	pss222a

Total Employer Contribution:

This shows the total employer contributions that were submitted for processing for that particular listbill.

Submitted By:

This show the user that submitted that particular listbill for processing.

NOTE: The Remitter page serves as a record keeping feature for the plan and allows the authorized user to pull previous listbills submissions for review. The user can also click on the Microsoft Excel icon at the corner of the page to pull up a spreadsheet showing the same remitter information. In addition, user can view and/or save information in an excel spreadsheet format.


Sample of Remitter for Previously Submitted Listbill

eContributions Listbill Remitter					
Plan/Timer ID: DA001 Plan Name: Parson Gifts Submit Date: 03/12/2018 01:01:51 PM					
Participant Name	Tax ID	Account Number	Employee Contribution	Employer Contribution	Total Contribution
JANE SM	xxx-xx-9999	xxxxx2174	\$25.00	\$25.00	\$50.00
SMITH JO	xxx-xx-9999	xxxxx2995	\$25.00	\$25.00	\$50.00
Totals...			\$50.00	\$50.00	\$100.00

Profile Page

The Profile page lists all the contact information and details for that particular user that is currently logged in and using the system. This includes their name, phone number, and email address. This information is based on each unique user, not the authorized person for the plan. Profile can be updated by the user, including changing their login password at any time.

[Home](#) [Profile](#) [User Administration](#) [Contact Us](#) [Logout](#)



eContributions
Today is Mon, Mar 12, 2018
Your last login was Mon, Mar 12, 2018 11:29 AM

Your Profile

Name:
Office Phone:
Mobile Phone:
Email Address:


Contact Name
770-381-1000

contactemail@primerica.com
[Edit](#) [Change Password](#)

Forms
New Web User Request Forms
Employer Forms

Let Us Help You
Most Frequently Asked Q&A
eContributions User Manual

eContributions Forms

		
Forms		
New Web User Request Forms		
Form Name	Description	View and Print
eContributions Services Employer Application (POL-30)	Employers use this form to request the ability to deliver via the internet Plan Contribution Instructions for PPS custodial retirement plans, and to provide authorization for PPS Investments, or PPS, to initiate debits against a designated bank account to fund the contributions.	Open Form
Employer Forms		
Form Name	Description	View and Print
Change of Authorized Officer for Plan Sponsor (POL-52)	This form is used to change or update the authorized officer of plan sponsor regarding eContributions.	Open Form
Beneficiary Change Form (POL-08)	Account owners use this form to update the beneficiary designation on Retirement Plan Accounts.	Open Form
Name Change Form (POL-39)	Account owners use this form to change the name on their accounts to a new legal name.	Open Form
403(b) Distribution Form (POL-21)	Account owners use this form to request distributions from their 403(b) plan accounts.	Open Form
403(b) Loan Application (POL-24)	Account owners use this form to apply for a loan against their 403(b) plan accounts.	Open Form
Payroll Deduction Remittance Transmittal (POL-07)	Plan sponsors use this form to update the investment amounts into plan participants accounts.	Open Form
eContributions Automated Clearing House (ACH) Account / Bank Change Form (PFS-SACH)	This form is used to update or change the ACH information for the plan.	Open Form
Employer Plan Documents		
Form Name	Description	View and Print
Simplified Employee Pension (SEP) Plan	This booklet provides plan custodians with instructions and forms for the Simplified Employee Pension (SEP) Plan.	Open Form
SIMPLE and SAR-SEP Plans	This booklet provides plan custodians with instructions and forms for the Savings Incentive Match Plan for Employees (SIMPLE) and Salary Reduction Simplified Employee Pension (SAR-SEP) Plans.	Open Form
Payroll Deduction Plan (PDP)	This booklet provides plan custodians with instructions and forms for Payroll Deduction Plan for IRA/Voluntary Accounts.	Open Form
403(b) and ORP-TSA 403(b)	This booklet provides plan custodians with instructions and forms for 403(b) Tax Sheltered Account (TSA) Plans, and for ORP-TSA 403(b) Plans for use by employees of Texas institutions of higher education.	Open Form

Forgotten Password

To update your password, Login ID, Email Address, Plan ID and Plan Type must be submitted. Once completed an authentication code will be sent to the user to log in. This process is similar to the initial set up to register and use eContributions.



Forgot Password

We need the following information to reset your password.

User ID * [Forgot User ID](#)

Submit

Cancel

How to Contact Us

By Mail

Primerica Shareholder Services
P.O. Box 534473
Pittsburgh, PA 15253-4473

By Phone

To speak with a Client Service Representative, please dial 1-800-544-5445.

eContributions Enrollment

If you need help with the eContributions Enrollment process, please contact our Client Service Representative at 1-800-544-5445.

If you have not received the self-registration e-mail, please [click here](#) to begin the self-registration process.

eContributions Access

If you are having trouble logging into or navigating the eContributions site, please contact a Client Service Representative at 1-800-544-5445.

If you have created a user name and password for eContributions please [click here](#). If you have forgotten your password please [click here](#) and follow

Logging Out

Once the user has completed their listbill submission or any other administration in the system, they can select the Logout option at the top of the screen. Any additional maintenance or submissions will require the user to log into the system to complete any processing or maintenance

[Contact Us](#) [Sign in](#)



eContributions

Logout Successful!

You have successfully logged out of the eContributions application. To securely log out, please [close this browser window](#). You must [login](#) to begin a new session.

Contact Information

The “How to Contact Us” page provides different options how to contact Primerica regarding eContributions.

How to Contact Us

By Mail

Primerica Shareholder Services
P.O. Box 534473
Pittsburgh, PA 15253-4473

By Phone

To speak with a Client Service Representative, please dial 1-800-544-5445.

eContributions Enrollment

If you need help with the eContributions Enrollment process, please contact our Client Service Representative at 1-800-544-5445.

If you have not received the self-registration e-mail, please [click here](#) to begin the self-registration process.

eContributions Access

If you are having trouble logging into or navigating the eContributions site, please contact a Client Service Representative at 1-800-544-5445.

If you have created a user name and password for eContributions please [click here](#). If you have forgotten your password please [click here](#) and follow the steps to reset your password. For requests involving forgotten passwords, or accounts that have been locked out from incorrect login attempts, please contact 1-800-332-4550 and select Option 7 for assistance.

Plan Administrator

Who is a Plan Administrator?

A Plan Administrator (Admin) is an **eContributions** user whose ID is set up with the *User Administrator* role.

A user with the role of *Plan Administrator* cannot be set up through the **eContributions** application. *Plan Administrator* user ID requests have to be submitted in writing—either in the eContributions Services Employer Application (POL-30) or the Change of Authorized Officer for Plan Sponsor (POL-52). See the Forms link on the **eContributions** site.

What can a Plan Administrator do?

Only an Plan Administrator has access to the *User Administration* menu when logged into the **eContributions** application.



An **eContributions** user who serves as the Plan Administrator on a plan, or plans, can perform the following functions via the User Administration menu for the plan(s):

- ▶ **View and Unlink Users:**
 - View a list of all active eContributions users who are linked to the same plan(s)
 - Unlink eContributions users from those plans
- ▶ **Add New Users:**
 - Set up users who do not have an **eContributions** user ID and link them to plans
- ▶ **Add Plans to Existing Users:**
 - Link users who have an **eContributions** user ID to plans

View & Unlink Users

Clicking on the *View & Unlink Users* menu option presents to the Admin user a list of all users linked to the plans on which the Admin user serves as the Plan Administrator. On this screen, the Admin can perform the following:

- Sort: Sort the data presented in the list
- Search: Search for specific data in the list
- Unlink Users: Terminate a user's access to a plan

PRIMERICA[®] eContributions
Today is Fri, Mar 16, 2018
Your last login was Thu, Mar 15, 2018 02:55 PM

Home Profile User Administration Contact Us Logout

User Administration

Users Linked To Your Plans

	Plan/Timer ID	First Name	Last Name	Role	Email Address	Unlink User
	ABC12	Mary	Smith	Auth ER User	mary.smith@abccorp.com	<input type="checkbox"/>
	XYZ99	John	Johnson	TPA	john.johnson@gmail.com	<input type="checkbox"/>
	VQ555	Robert	Greene	PFSI (rep)	robert.greene@greenebros.com	<input type="checkbox"/>

Cancel Save

Forms
New Web User Request Forms
Employer Forms
Employer Plan Documents

Let Us Help You
Most Frequently Asked Q&A
eContributions User Manual
Security of Online Account Information

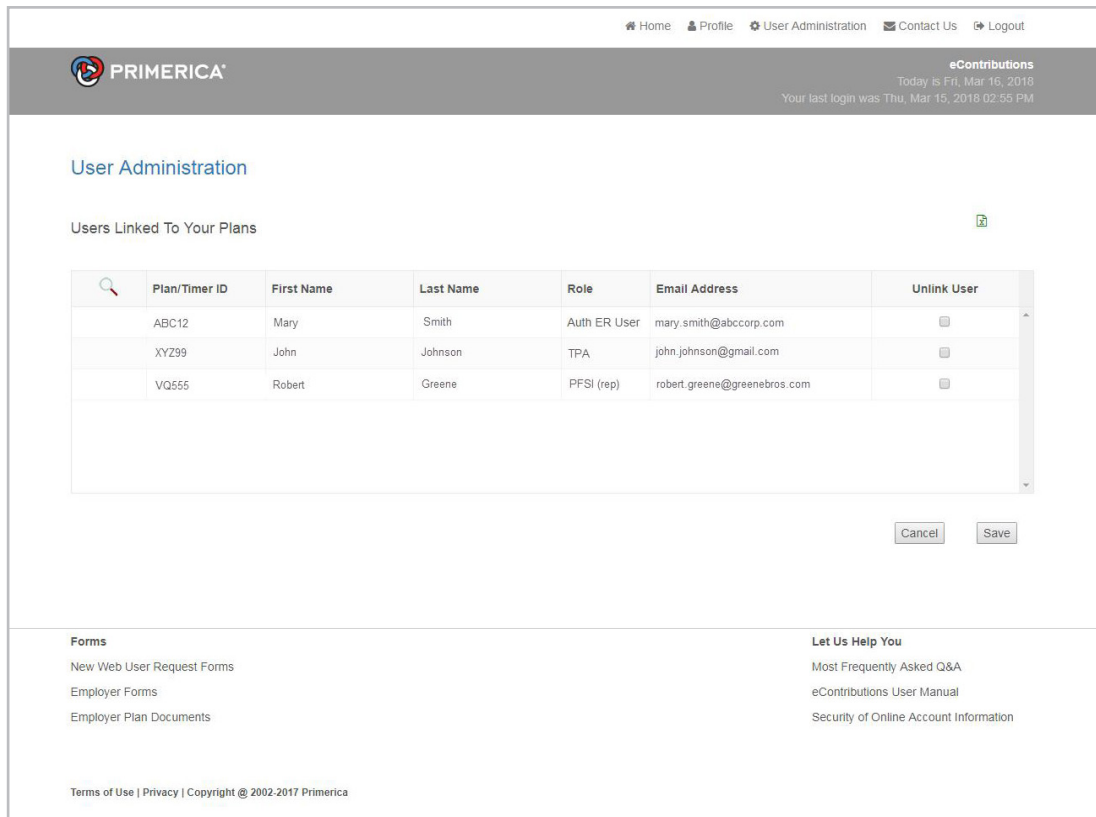
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How to Search

1. Click on the
2. Enter the information to be searched in the applicable column:
 - Plan / Timer ID
 - User First Name
 - User Last Name
 - User Role
 - User Email Address
3. Click on or press <Enter>

How to Sort

1. Click on the title of the column by which you want to sort.
2. Click again to switch from ascending to descending sort.



The screenshot shows the PRIMERICA User Administration interface. At the top, there is a navigation bar with links for Home, Profile, User Administration, Contact Us, and Logout. Below this is a header section with the PRIMERICA logo and the eContributions logo. The main content area is titled "User Administration" and contains a section "Users Linked To Your Plans". This section displays a table with the following columns: Plan/Timer ID, First Name, Last Name, Role, Email Address, and Unlink User. The table contains three rows of data. Below the table are "Cancel" and "Save" buttons. At the bottom of the page, there are links for "Forms" (New Web User Request Forms, Employer Forms, Employer Plan Documents) and "Let Us Help You" (Most Frequently Asked Q&A, eContributions User Manual, Security of Online Account Information). The footer contains the text "Terms of Use | Privacy | Copyright © 2002-2017 Primerica".

Plan/Timer ID	First Name	Last Name	Role	Email Address	Unlink User
ABC12	Mary	Smith	Auth ER User	mary.smith@abccorp.com	<input type="checkbox"/>
XYZ99	John	Johnson	TPA	john.johnson@gmail.com	<input type="checkbox"/>
VQ555	Robert	Greene	PFSI (rep)	robert.greene@greenebros.com	<input type="checkbox"/>

How to Unlink Authorized Users

1. Check the box in the *Unlink User* column for the user and plan that are to be unlinked. More than one box can be checked.
2. Click on **Save**.

The following message is returned when the user is successfully unlinked.

The selected users were successfully unlinked.

The selected user and plan is immediately removed from the Admin's list and the user's access to the plan is terminated. A user, who is linked to multiple plans, is included in the Admin's list multiple times - once for each plan.

Add New Authorized Users

Clicking on the *Add New Users* menu option allows the Admin to grant **eContributions** access to those who do not already have an eContributions user ID.

After the Admin completes the process detailed below, the new user will receive an email that will provide instructions to set up a user ID and password. Once the new user has completed the self-registration process, he/she will have access to the plans that the Admin linked to him/her. A new user will not be included in the Admin's list under the *View and Unlink Users* option (see above) until the new user has completed the self-registration process.

How to Add a New Authorized User

1. Select the *Add New Users* option from the *User Administration* menu.
2. Enter the new user's information in **First Name**, **Last Name** and **Email Address**.
3. Select one of the three options - Auth ER User, TPA, or PFSI (rep) - for **User Role**.
Note: Authorized Administrator is not an option. Access for people with this role cannot be granted through the **eContributions** online application.
4. In the **Select Plans** section, click on the plan ID for the plan(s) to which the new user has to be linked so that the plan IDs are moved to the right. The list on the left consists of all plans to which the Admin is assigned as the plan Administrator.* The new user will be linked to any plan that is moved to the right.
***Exception:** Users with a role of *PFSI (rep)* cannot be linked to either of the two 403(b) plan types—403(b) Plan and 403(b) Plan ORP Texas Only. When the selected User Role is *PFSI (rep)*, plans with either 403(b) plan type are excluded from the list in the **Select Plans** section.
5. Click on **Save**.

The screenshot displays the eContributions User Administration interface. At the top, there is a navigation bar with links for Home, Profile, User Administration, Contact Us, and Logout. Below this is a header section with the PRIMERICA logo and the eContributions title, along with the current date and time (Today is Tue, Nov 02, 2021) and the user's last login information (Your last login was Tue, Nov 02, 2021 10:59 AM).

The main content area is titled "User Administration" and contains a section for "Add New Users". This section includes input fields for "First Name", "Last Name", and "Email Address". Below these is a "User Role" dropdown menu, which is currently open, showing three options: "Select User Role", "Auth ER User", and "TPA". The "Auth ER User" option is selected. At the bottom of the form are "Cancel" and "Save" buttons.

Below the form, there are two columns of links. The left column, titled "Forms", includes links for "New Web User Request Forms", "Employer Forms", and "Employer Plan Documents". The right column, titled "Let Us Help You", includes links for "Most Frequently Asked Q&A" and "eContributions User Manual".

At the very bottom of the page, there is a footer containing links for "Terms of Use", "Non-EU Cookie Policy", "EU Cookie Policy", "Website Privacy", "Privacy", "Copyright © 2002-2017 Primerica", and "Manage Cookies".

The following message is returned when the New User ID request is accepted.

The request has been accepted. An email with instructions for registering an ID and password will be sent to the new user. New users are not included in the list of users linked to your plans until the registration process is complete.

The following message is returned if the Admin submits a new user request with an email address that is already associated with an eContributions user ID to which no plans are linked. In this scenario, the plans that the Admin submits in the new user request become linked to the user's existing ID and the user does not have to go through the self-registration process.

The request has been accepted.

Add Plans to Authorized Existing Users

The Admin can add/link additional plans to users who are included in the View and Unlink Users list. The User Role can be different than any other role(s) that the user already.

How to Add Plans to Existing Authorized Users

1. Select the *Add Plans to Existing Users* option from the *User Administration* menu.
2. From the **User** list, select the name of the user to whom you are going to link additional plans. This list is made up of users who are included in the *View and Unlink Users* list.
3. From the User Role list, select the role in which the user will serve for the plan(s) selected. A user may serve in different roles for different plans.

The screenshot displays the eContributions User Administration interface. At the top, there is a navigation bar with links for Home, Profile, User Administration, Contact Us, and Logout. Below this is a header section with the PRIMERICA logo and the eContributions logo, along with the date and time of the last login. The main content area is titled 'User Administration' and contains a section for 'Add New Users'. This section includes input fields for 'First Name', 'Last Name', and 'Email Address', and a dropdown menu for 'User Role'. The 'User Role' dropdown is currently open, showing options: 'Select User Role', 'Auth ER User', and 'TPA'. Below the dropdown are 'Cancel' and 'Save' buttons. At the bottom of the page, there are links for 'Forms' (New Web User Request Forms, Employer Forms, Employer Plan Documents) and 'Let Us Help You' (Most Frequently Asked Q&A, eContributions User Manual). The footer contains links for Terms of Use, Non-EU Cookie Policy, EU Cookie Policy, Website Privacy, Privacy, Copyright, and Manage Cookies.

4. In the **Select Plans** list that is presented after the **User** and **User Role** are selected, click on the plan(s) to which the user is to be linked so that they are moved to the list on the right. The list that is presented on the left consists of the plans to which the selected **User** is not already linked under the selected **User Role**. The new user will be linked to any plan that is moved to the right.
5. Click on **Save**.

The following message is returned when the request is accepted. This information will be updated to the list on the *View and Unlink Users* screen.


The user was successfully added to the selected plan(s).

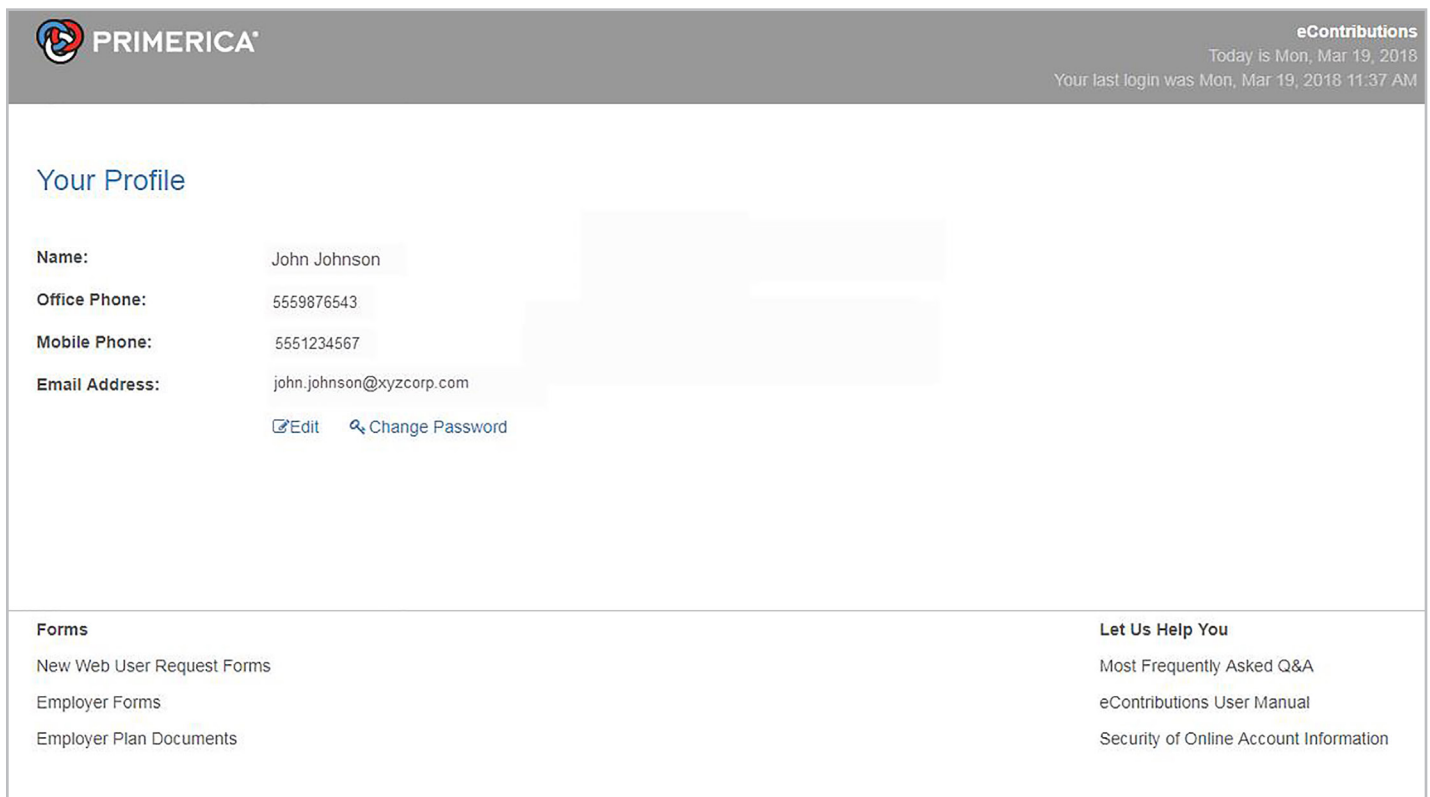
User Profile Maintenance

A user with any role - Authorized Administrator, Auth ER User, TPA, PFSI (rep) - can access the User Profile Maintenance option when logged into the eContributions site. This function allows the user to maintain information associated with his/her eContributions user ID as follows:

- **Edit:** Allows the user to change **Office Phone, Mobile Phone** and/or **Email Address**
- **Change Password:** Allows the user to change his/her password

How to Edit User Information

1. Click on  **Profile** at the top of the screen to get the Your Profile screen.
2. Click on the **Edit** link.



PRIMERICA eContributions

Today is Mon, Mar 19, 2018
Your last login was Mon, Mar 19, 2018 11:37 AM

Your Profile


Name:	John Johnson
Office Phone:	5559876543
Mobile Phone:	5551234567
Email Address:	john.johnson@xyzcorp.com

[Edit](#) [Change Password](#)

Forms	Let Us Help You
New Web User Request Forms	Most Frequently Asked Q&A
Employer Forms	eContributions User Manual
Employer Plan Documents	Security of Online Account Information

3. Enter the information to be updated in the appropriate fields.
4. Click on **Save**.

How to Edit User Information (Continued)

 **PRIMERICA**

eContributions
Today is Tue, Mar 20, 2018
Your last login was Tue, Mar 20, 2018 10:35 AM

Your Profile

Name: John Johnson

Office Phone:

Mobile Phone:

Email Address:

Confirm Email Address:

Forms
[New Web User Request Forms](#)
[Employer Forms](#)
[Employer Plan Documents](#)


Let Us Help You
[Most Frequently Asked Q&A](#)
[eContributions User Manual](#)
[Security of Online Account Information](#)

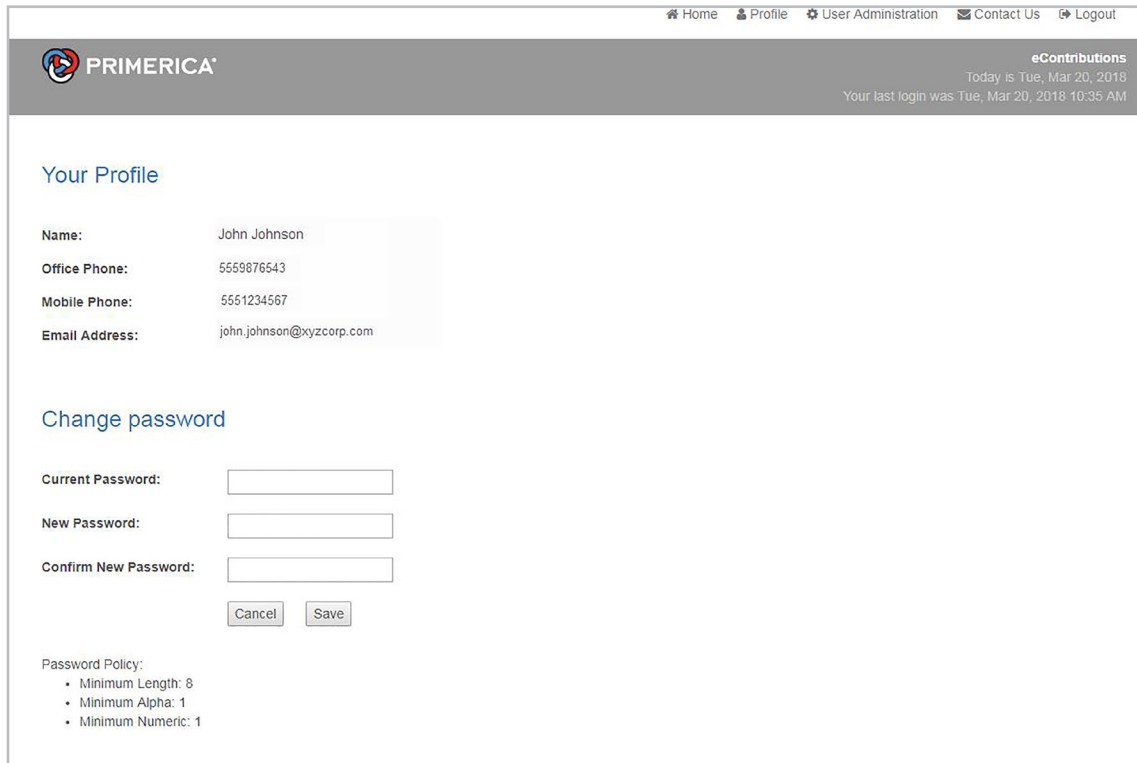
[Terms of Use](#) | [Privacy](#) | Copyright @ 2002-2017 Primerica

The following message is returned when the update is accepted.

Your profile has been successfully updated.

How to Change Password

1. Click on  **Profile** at the top of the screen to get the *Your Profile* screen.
2. Click on the **Change Password** link.



The screenshot shows the PRIMERICA user interface. At the top, there is a navigation bar with links: Home, Profile, User Administration, Contact Us, and Logout. Below this is a header section with the PRIMERICA logo and a 'eContributions' section showing the date 'Today is Tue, Mar 20, 2018' and the last login time 'Your last login was Tue, Mar 20, 2018 10:35 AM'.

The main content area is titled 'Your Profile' and displays the following information:

Name:	John Johnson
Office Phone:	5559876543
Mobile Phone:	5551234567
Email Address:	john.johnson@xyzcorp.com

Below the profile information is the 'Change password' section. It contains three input fields:

- Current Password:
- New Password:
- Confirm New Password:

At the bottom of this section are two buttons: 'Cancel' and 'Save'.

Below the password fields is a 'Password Policy' section with the following requirements:

- Minimum Length: 8
- Minimum Alpha: 1
- Minimum Numeric: 1

3. Enter the Current Password.
4. Enter the New Password.
5. Re-enter the new password in **Confirm New Password**.
6. Click on **Save**.

The following message is returned when the password is accepted.

Your password has been successfully changed.

eContributions

Frequently Asked Questions

What retirement plan types are eligible for enrolling in eContributions?

A. SEPs, SIMPLEs, SARSEPs, 403(b)s and Payroll Deduction Plan (PDP)s.

What is the eContributions website used for?

A. For submitting payroll remittance or listbill of employer and employee retirement plan contributions via ACH.

Can employer add additional (authorized) users for this role?

A. Yes. Employer can add their Third Party Administrator (TPA). Please refer to the user manual for a complete step by step of how to add additional users.

What type of access will these additional users have?

A. Their access will be limited to editing or changing employee contributions and submitting listbill information for processing. They will not have access to update or change contact information or bank information. All user roles can change their contact profile information – no users (including plan administrators) can change banking information.

How can employer change the authorized access of additional users?

A. There is an editing feature on the website for Authorized Officer of the Employer to unlink any additional user they would like to remove from having access to the eContributions website regarding the employer's plan. Once this selection is made to unlink the additional user, the user will no longer be able to view the plan selection if they try to log into the website.

How can employer change the individual representing the employer as the Authorized Officer?

A. New Authorized Officer needs to submit form POL-52 along with a letter of instructions on the employer's letter head, stating reason for change and who the new Authorized Officer will be along with their information. This form can be sent via mail, fax or email.

How do I add new employee to the system?

A. New participants enrolling in the employer sponsored retirement plan need to complete an enrollment application with a PFSI representative ONLY. Once that is done, the employee will be in PSS database that will link to the eContributions website of the employer. The new participant will automatically be added to the list of participating employees. The employer can then select that employee as an active participant for retirement contributions.

How can I access the eContributions website?

A. The eContributions website can only be accessed by authorized users. Once authorized user go to <https://econtrib.bnymellon.com/econtrib/> and complete and mail or fax form POL-30, which is the employer application for eContributions services, they will be sent a registration link to create a unique user ID and password. Once Authorized Officer of the employer is set up, they can assign additional users at their discretion to have access to the eContributions website and their employer sponsored retirement plan.

Do you have a step by step guide to help me learn and use this system?

A. Yes. The user manual can be accessed on the welcome page on the eContributions website under eContributions User Manual.

How do I contact our PFSI representative if I need additional help?

A. If you do not have the contact information of your current PFSI representative, please call 1-800-544-5445 and our client service representative can assist you with that information.

Once listbill is submitted via eContributions, how long before it's processed and employees' accounts credited with employer and/or employee contributions?

A. Once employer submits their listbill on the eContributions website for processing, if it's before 2pm on that business day, listbill will be processed on that day with that business day's trade date. If submitted after 2pm but before 4 pm, listbill will be processed the next business day with the previous business day's trade date. If submitted after 4pm on that business day, listbill will be processed the next business day with the next business day's trade date.

Are there specific days or times that I will not be able to access this system?

A. No. You can access the system 24/7. However, the processing time and trade date will depend on the time of day and day of the week in order for listbill contributions to be credited to employee's accounts.

Who is ultimately responsible for the census and remitter information inputted on the listbill for processing?

A. The Authorized Officer of the employer is ultimately responsible for overseeing that information was entered correctly in the eContributions system. In the event an authorized user was assigned by the Authorized Officer of the employer, the Authorized Officer representing the employer is ultimately responsible for policing any and all additional users and their usage.

How do I remove an employee who no longer wants to contribute?

A. If an employee wants to stop or start their employee contribution, each listbill remitter can be updated by selecting or deselecting that particular employee(s) and edit whether to add or remove them from that particular listbill. Employee will still be in the eContributions system, but they will not appear on that particular listbill if the box that's marked active is deselected.

How do I remove an employee who leaves the organization?

A. If the employee still has their retirement account link to the employer, the only way to remove them from the eContributions system is if the employee rollover or transfer their account to their new employer or to an individual account. Their retirement account will then be unlinked from your employer sponsored retirement plan and they will no longer appear on your eContributions system.

How do I change the employer's banking information or contact information on file?

A. Submit the PFSI-EACH form via mail or fax to update or change banking information. Only one set of banking information is allowed on file at any given time.

Will the history of all listbill remitters submitted be available in the system for me to print on demand?

A. Yes

Will participants have access to this website as well?

A. No, this is for Plan Administrators/Employers and any additional users they delegate to have access ie. PFSI Representative or Third Party Administrator (TPA).



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Primerica Shareholder Services

1 Primerica Parkway - Duluth, GA 30099 - 770-381-1000

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