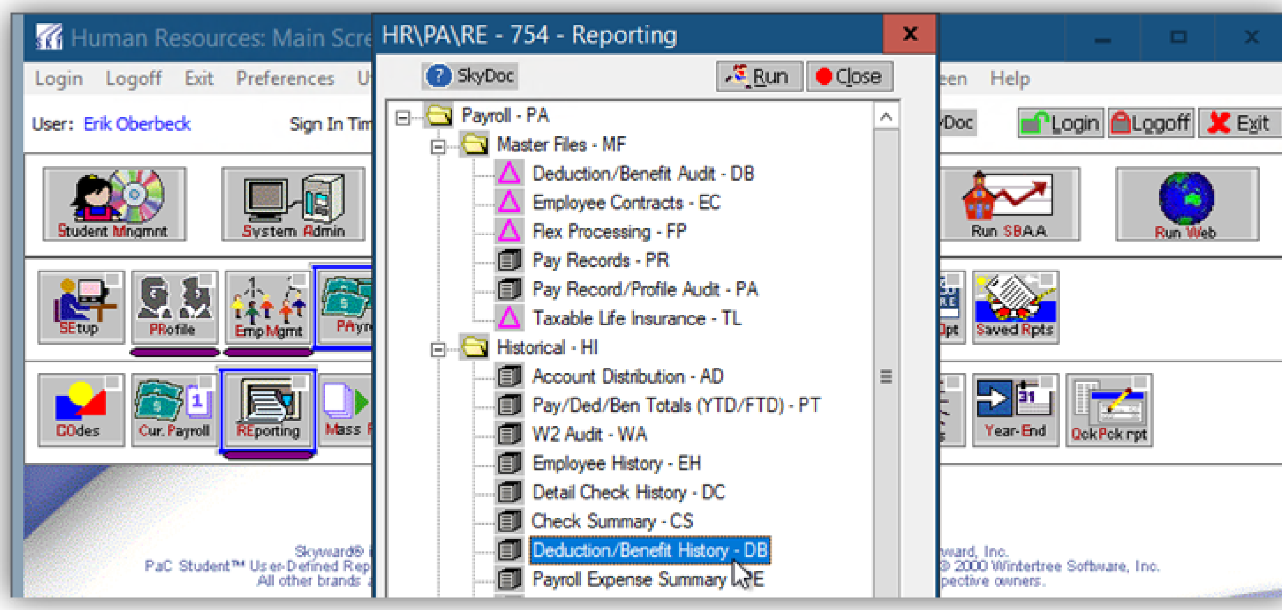
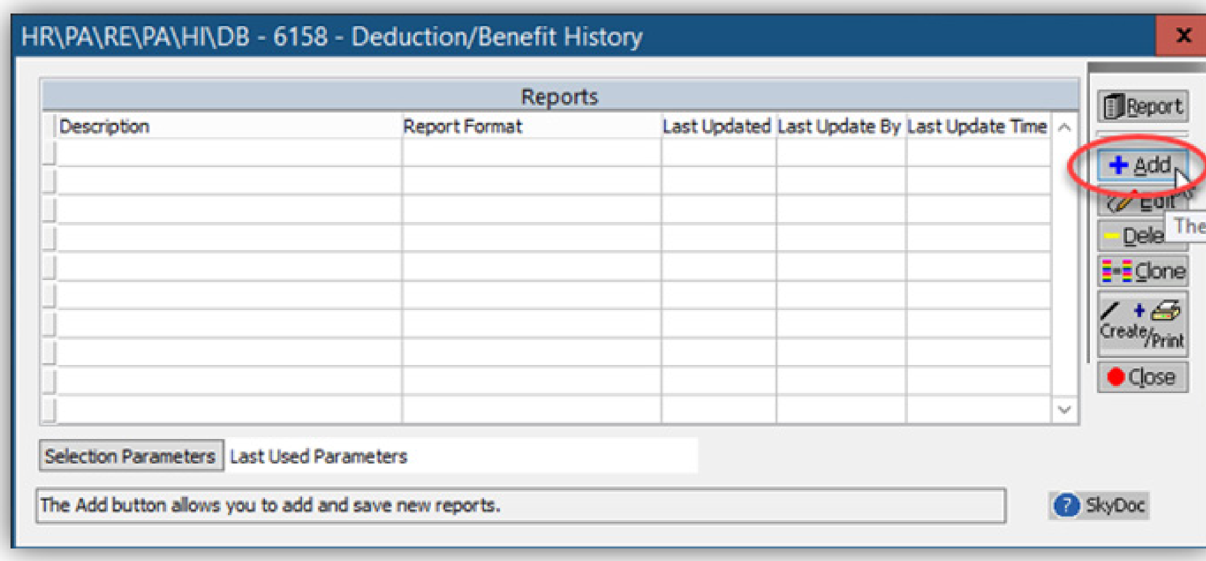
Exporting 403(b) remittance information
from Skyward PaC/SMS

INITIAL SETUP *(this section includes details of a one-time setup)*

Step 1: In SMS/PaC, go to Human Resources, Payroll, Reporting. Under Historical, choose Deduction/Benefit History.



Step 2: Click Add.



Step 3: Enter the report name for the applicable deduction/benefit type. You will create separate reports for the following that are applicable to your district:

a. WEA Pre-Tax 403B (deduction)
b. WEA Roth 403B (deduction)
c. WEA Employer contributions (benefit)
d. WEA Employer contributions subject to vesting (benefit)
e. WEA In lieu of benefit codes (deduction or benefit depending on district setup)

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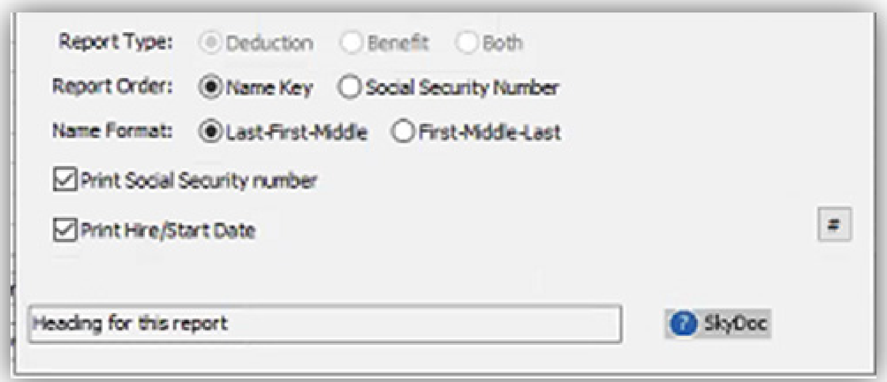
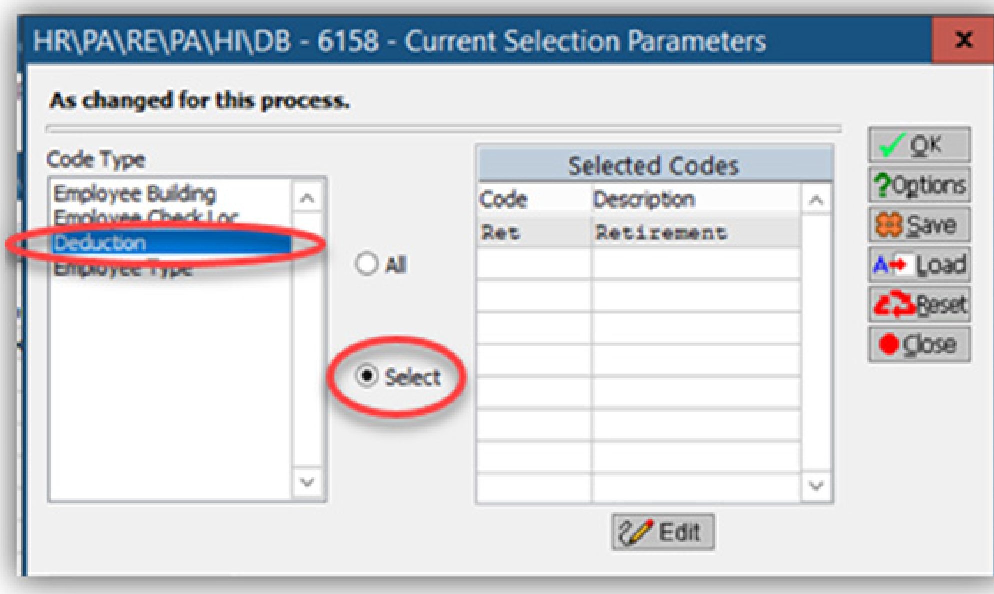
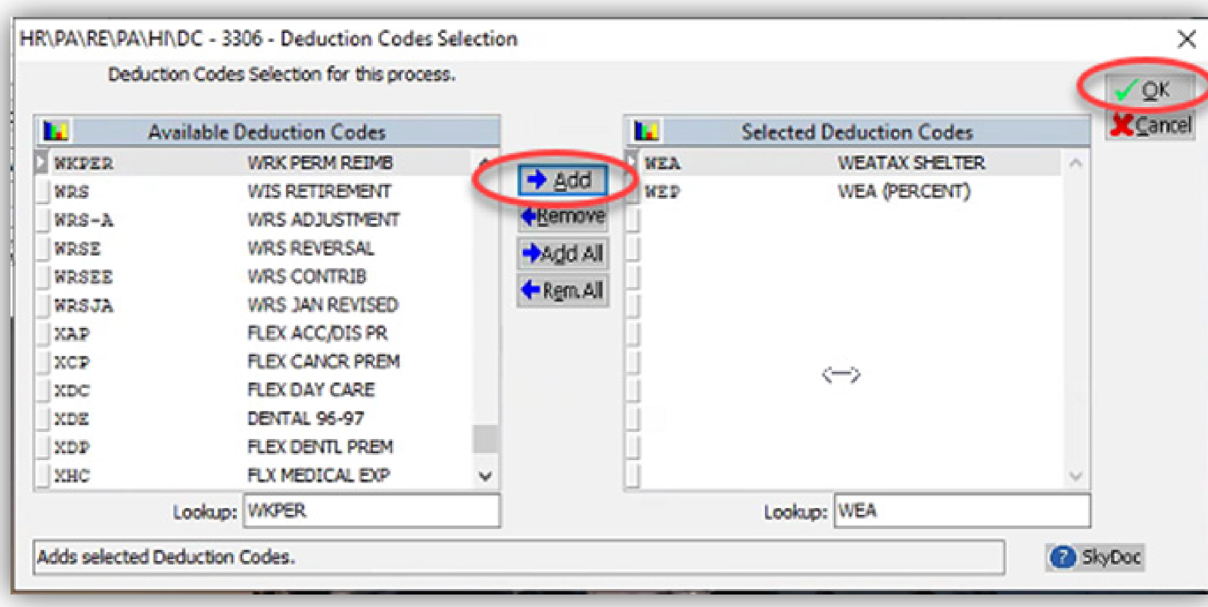
Step 4: Select the following for each template. Choose deduction or benefit depending on the report type. Make sure to check "Print Social Security Number" and "Print Hire/Start Date".



Step 5: Click on Deduction (or Benefit when applicable) and click Select.



Step 6: Choose the appropriate codes from the left and click Add to move them to the Selected Codes on the right. Click OK.



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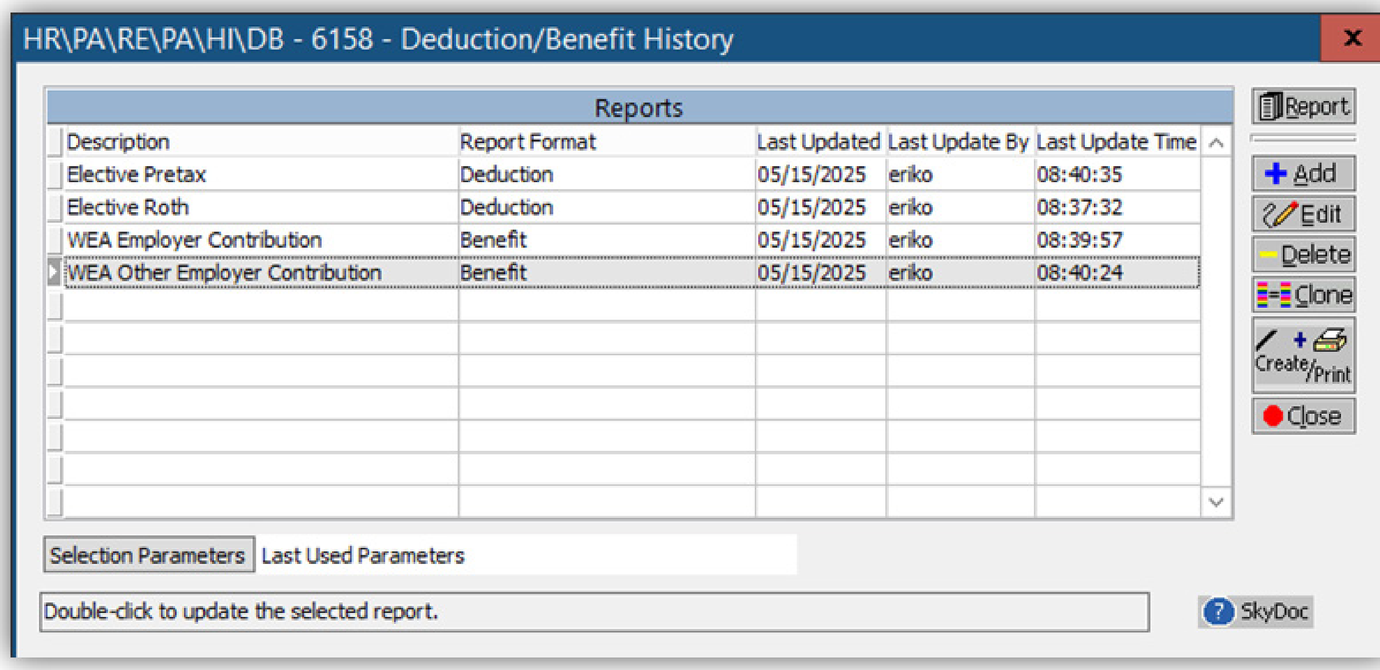
Step 7: Repeat the steps above for the other deduction/benefit types applicable to your district.

Step 8: Once you have created the applicable reports, your report templates should look something like this.



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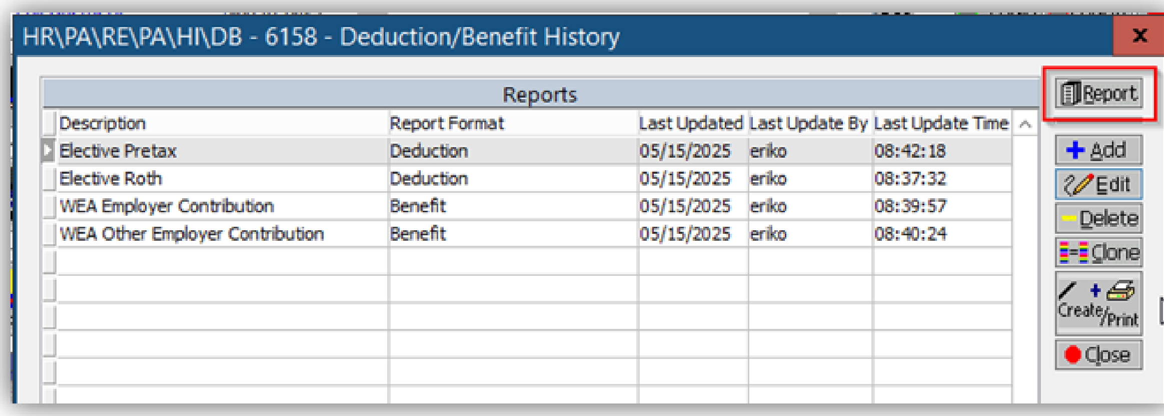
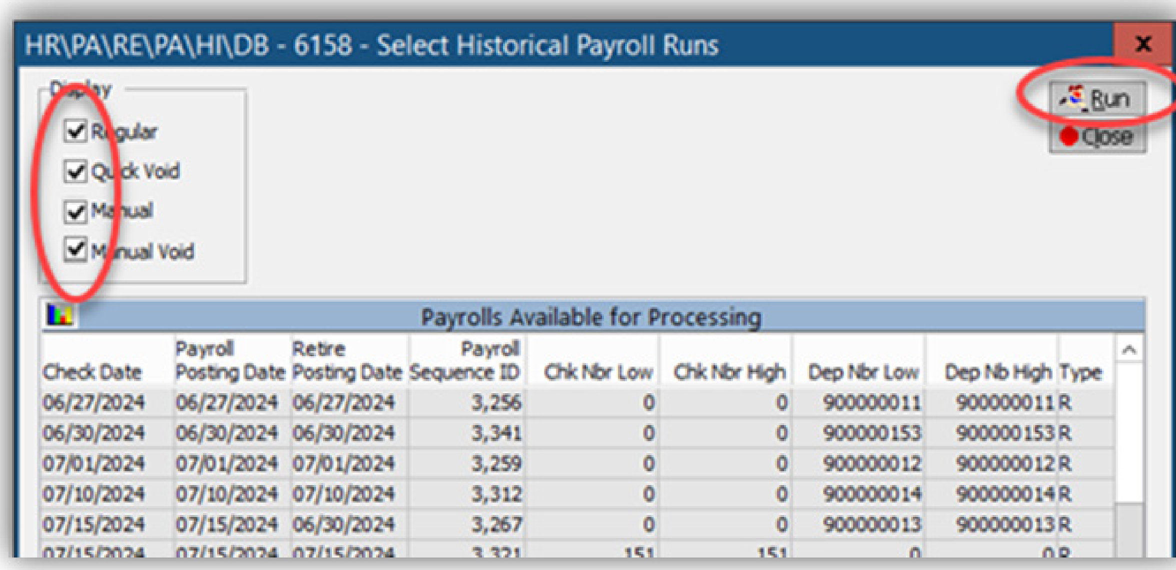
TO RUN THE REPORT

Step 1: Select the appropriate report and click Report on the right.

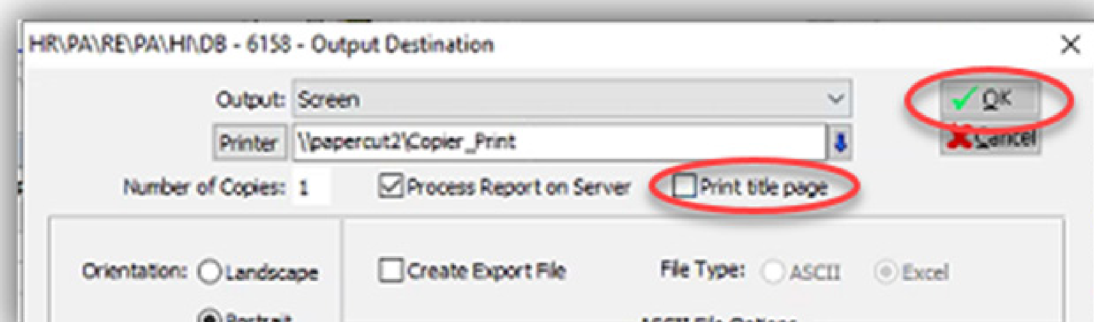


Step 2: Choose to display payroll types of regular, quick void, manual, and manual void. Then select the appropriate pay run, and click Run.

TIP: Use Ctrl + click to select multiple payruns.



Step 3: Unselect Print title page, and click OK.



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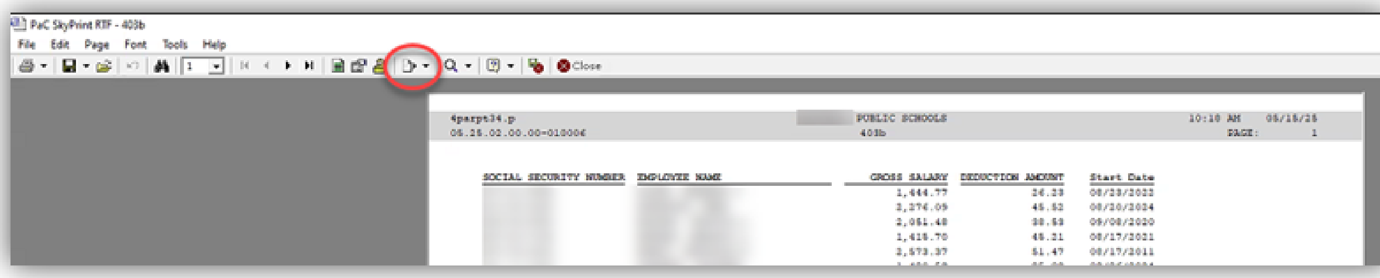
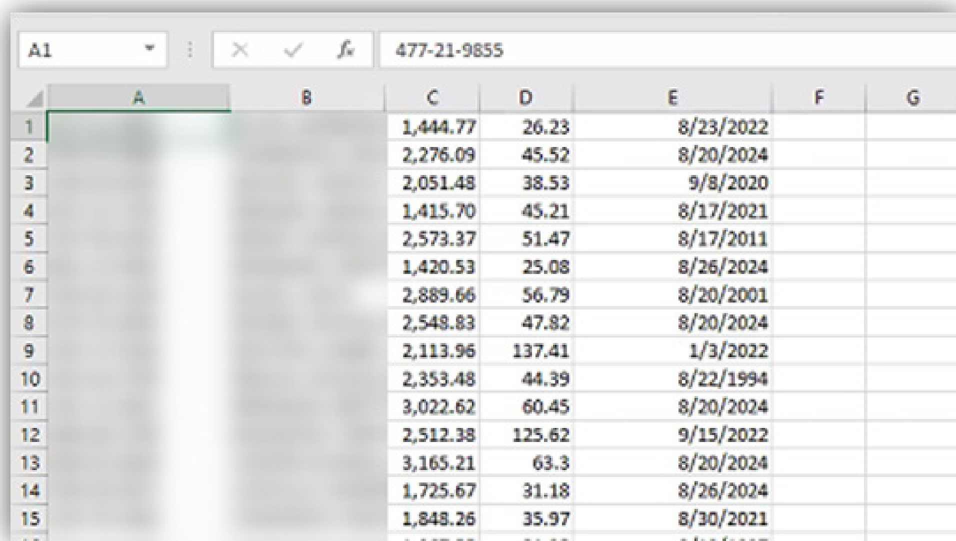
Step 4: When the report is generated to the screen, click the arrow next to Export, and choose Excel in the dropdown.



Step 5: The Excel file will look like this (columns of Social Security numbers and employee names are blurred below). Save the file to a folder for WEA 403b remittances. Name the file something like, "[school name] [type] [pay date range]".

Example: "Marshall pre-tax 20250415.xlsx".



	A	B	C	D	E	F	G
1			1,444.77	26.23	8/23/2022		
2			2,276.09	45.52	8/20/2024		
3			2,051.48	38.53	9/8/2020		
4			1,415.70	45.21	8/17/2021		
5			2,573.37	51.47	8/17/2011		
6			1,420.53	25.08	8/26/2024		
7			2,889.66	56.79	8/20/2001		
8			2,548.83	47.82	8/20/2024		
9			2,113.96	137.41	1/3/2022		
10			2,353.48	44.39	8/22/1994		
11			3,022.62	60.45	8/20/2024		
12			2,512.38	125.62	9/15/2022		
13			3,165.21	63.3	8/20/2024		
14			1,725.67	31.18	8/26/2024		
15			1,848.26	35.97	8/30/2021		

WEA
Member Benefits™
weabenefits.com

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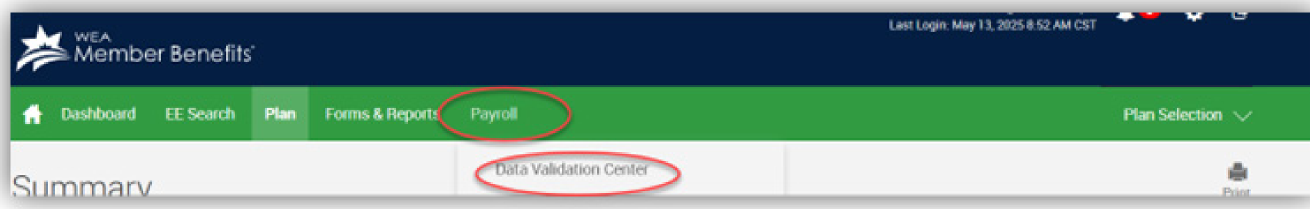
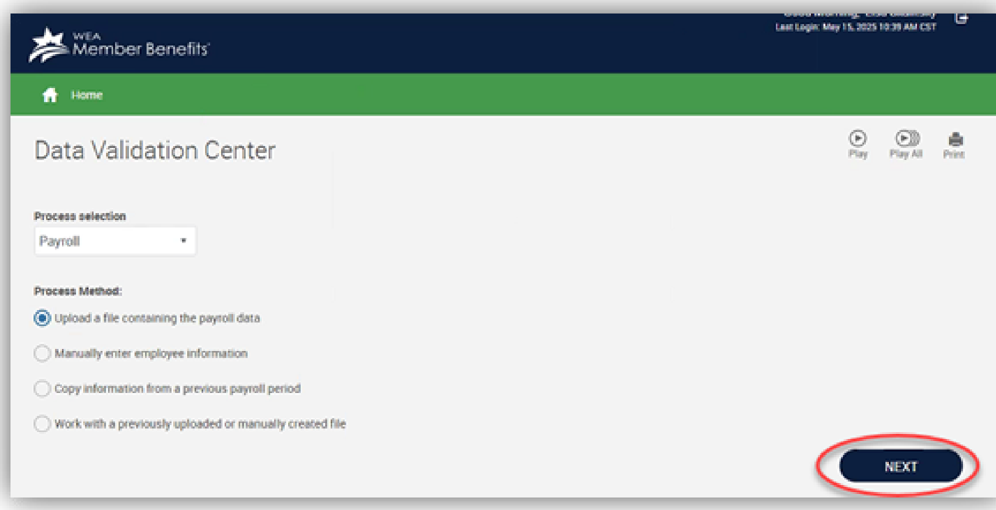
TO SUBMIT THE FILE ON *your*PLAN ACCESS

Step 1: Log onto *your*PLAN ACCESS at weabenefitsretirement.com/sponsor.aspx.

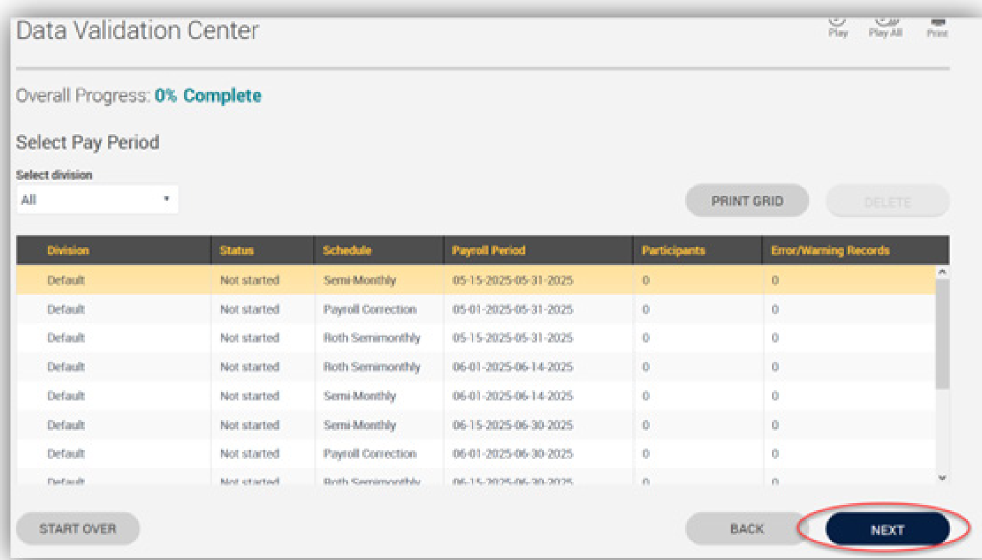
Step 2: Click on the Payroll menu and choose Data Validation Center.



Step 3: Select Upload a file containing the payroll data, and click Next.
TIP: You can choose "Work with a previously uploaded or manually created file", if you started to upload a file, but didn't complete the submission.



Step 4: Select the applicable payroll period and click Next. Please note that the draw will occur on the last day of the pay period selected.
If you don't see the applicable payroll period, please contact us at weaplanadmin@weabenefits.com.



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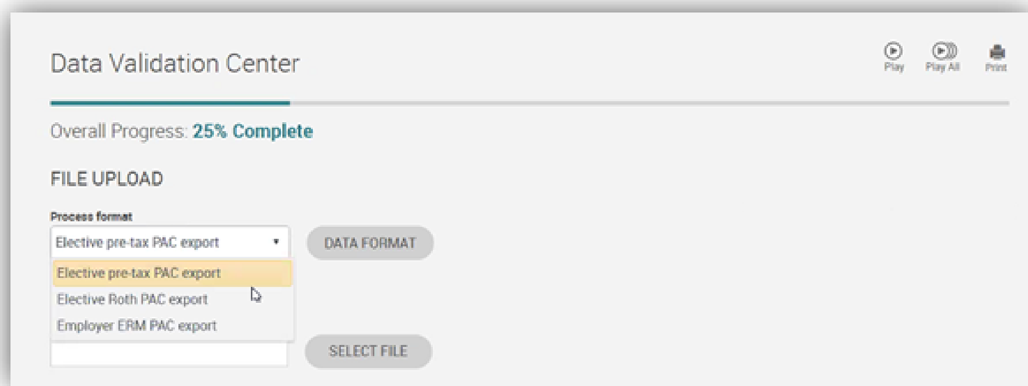
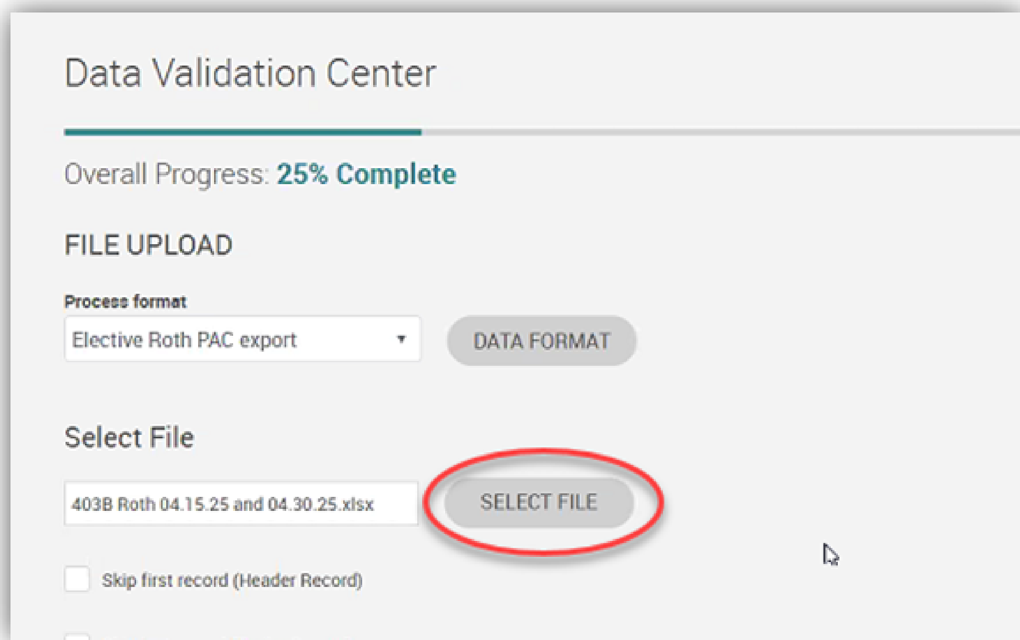
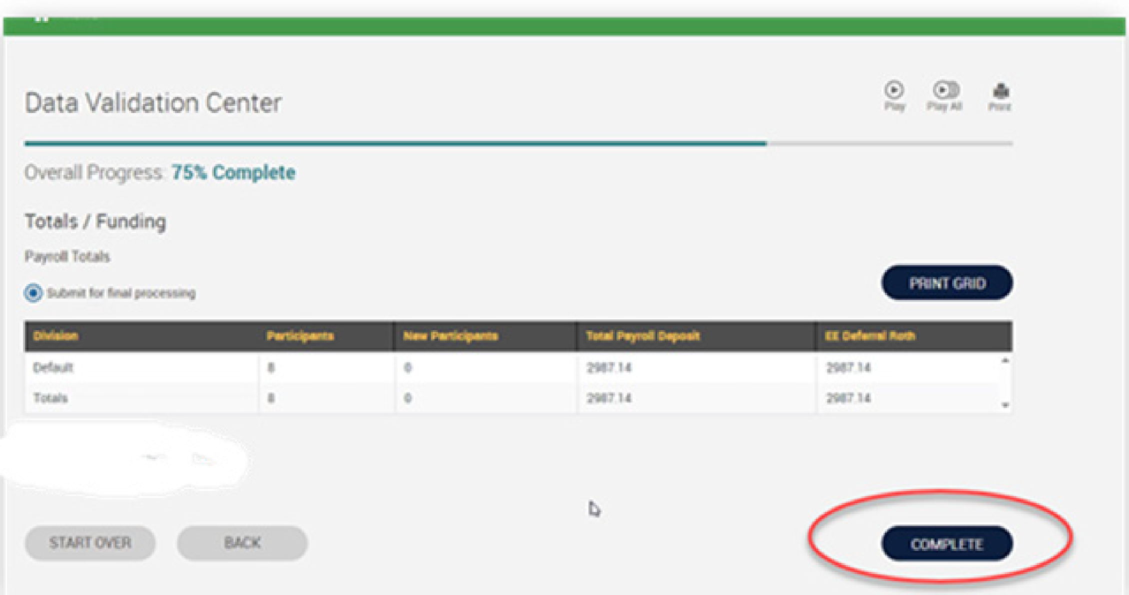
Step 5: In the Process format field, choose the appropriate format for the file that you're submitting.



Step 6: Click on Select File to browse for the Excel file that you saved from Skyward and click Next. You can also click on Preview file before clicking next to verify how the data imported.



Step 7: Verify the totals on this screen and click Complete.



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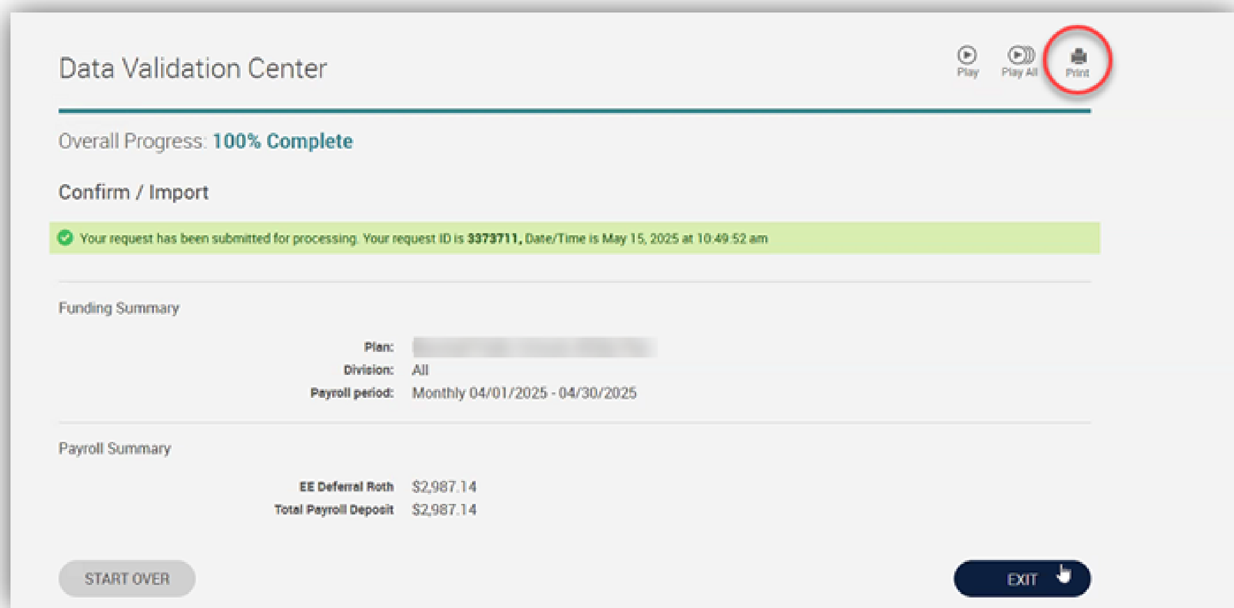
Step 8: Once you click Complete you will receive this summary screen. You can print this screen as confirmation.



Step 9: Repeat process for each contribution source file.

Step 10: The draw should occur on the last day of the pay period selected.