



# Update Employee Information

This is a step-by-step guide for updating participant contact information via the Data Validation Center (DVC).

Visit <https://www.yourplanaccess.net/retirementplanconsultants/>

Type in your **Username** and **Password**, as provided in your welcome letter.

Select role from dropdown menu: **Sponsor**

Click the **Login** button

A One-time PIN (OTP) is required to login. If you need additional guidance with the OTP process, click the **Logging in with Multi-Factor Authentication (MFA)** link (located above this gray login box).

Click the **Reports** option under the **Forms, Documents and Reports** Tab.

1) Select the **Employee Contact Information** report.

2) Choose **Excel** as the export file type and enter the current date in the **From** and **To date** fields.

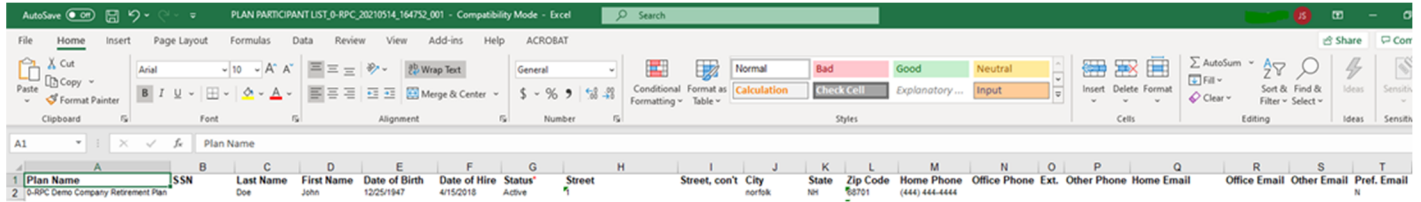
3) Click the **Submit** button.



# Update Employee Information

Open the report and edit participants' contact information. Save the Excel file to your computer.

- **NOTE:** You will need to **Enable Editing** and **resize the columns**



## Information to Update on the Excel Spreadsheet:

- Name, *if necessary*
- Physical Address (*Street, City, State, Zip*)
- Phone Number(s)
- Email Address(es)
- Preferred Email Code

### Acceptable Phone Number Formats

1234567890
123-456-7890
(123)456-7890

### Pref. Email Codes

Code	Definition
F	Office
H	Home
N	None <i>(Not Recommended)</i>
O	Other

- o If only one email is entered, enter the respective code in this field.
- o **'None'** is not recommended -- If **'None'** is entered participants will be unable to receive password reset links, or other emails regarding important account information.

## The following fields are for informational purposes only, and MAY NOT be updated via this form

- Plan Name
- Social Security Number
- Status

## REMINDERS:

- DO NOT delete or change the order of any columns on the Excel spreadsheet.
- To ensure participants can receive One-time PIN codes, the following information must be on their profile.
  - o At least one phone number AND
  - o At least one email address



# Update Employee Information

After the spreadsheet is complete, click **Enter the Data Validation Center (DVC) to Submit Contributions** option under the **Submit Payroll Contributions** Tab.

RETIREMENT PLAN CONSULTANTS LLC

Good After  
Last Login: May 1

Home Sponsor Dashboard Plan Information Manage Your Plan Submit Payroll Contributions Forms, Documents and Reports

Summary

Enter the Data Validation Center to Submit Contributions

## Data Validation Center

If you are submitting contributions for a participant that has not completed enrollment, please contact RPC to ensure they are pre-populated in the system. Adding a new employee via the Data Validation Center will not enroll the employee or add contributions to the employee's account.

**TIP:** If you signed out prior to fully submitting your payroll file, it will be stored in the 4th option titled "In Progress and/or Completed Files"

Process selection

Demographic

Process Method:

☒ Upload a file containing the demographic data

☐ Manually enter new employee information

Census - Dates and ...

DATA FORMAT

☐ Work with existing demographic file

Play Play All Print

- 1) Select **Demographic** from the Process selection dropdown list.
- 2) Click the **Upload a file** Process Method option.
- 3) Click the **Next** button.

- 1) Select **Employee Contact Information** from the Process format dropdown list.
- 2) Click the **Select File** button and choose the correct file from your computer to upload your saved Excel file. Check the box to skip the first record (Header Record). Check the box to skip the last record (Footer Record).
- 3) Click **Next** button.

Data Validation Center

Overall Progress: 25% Complete

FILE UPLOAD

Process format  
Employee Contact Information

DATA FORMAT

Select File

Employee Contact Information.xls

SELECT FILE

☒ Skip first record (Header Record)

☒ Skip last record (Trailer Record)

☐ Preview file

Special instructions  
Please Note: This field may not be used to specify a future funding date. Contributions will be drafted from the bank account on the day they are submitted.

START OVER BACK NEXT



# Update Employee Information

Review any warnings on the next screen to ensure the information is correct.

- 1) You must click on a row in the list of participants to see the warning in the box below.
- 2) Review any warnings to ensure the information is correct. Critical errors will show as an '**Error Description**' and must be fixed before you can submit.
- 3) If the information is correct, you can bypass the warning by clicking the **Next** button.
- 4) If the information needs to be edited, click the **Back** button. Revise and save your Excel spreadsheet, then repeat the steps on the bottom of the previous page.

Data Validation Center

Overall Progress: 50% Complete

Edit Data

Save

Undo

Delete

Refresh

Add All

Add New

Add Existing

Validate Records

Print Errors

Print Grid

Download

\*\*\*\*\*0001, Vidal Dias, Jose

File(s)

All Files

CLEAR FILTERS

New	Status	Social Security Num...	Name -	Name - First	Date of Birth	Date of Hire - Original	Address
Yes	Critical	*****0001	FirstName	LastName	01/01/1989		123 Ma

<<

<

Page 1 of 1

>

>>

20

items per page

Severity	Error
Warning	This participant does not have a phone number or email address on file. Please add at least one of each if possible.
Error Description	This employee requires a Date of Hire to be entered because the SSN is not currently stored in our system. If this is not a new employee, please double check the SSN is entered correctly.

START OVER

4

BACK

NEXT

3



# Update Employee Information

Review your import.

- 1) Click the **Submit for Final Processing** option.
- 2) Click the **Complete** button.

Data Validation Center

Play

Play All

Print

Overall Progress: 75% Complete

Totals

File Import Results

PRINT REPORT

Import Census Report

Job Status:	Successful
Plan ID:	0-RPC
Plan name:	0-RPC Demo Company Retirement Plan
DER name:	Employee Contact Information
Transfer file:	\\vrlaspdxag2\rpc100\DataNew\0-RPC_2439162_.xls
Mode:	Preview
Transfer processed on:	05/17/2021
Execution Errors:	None
Special Instructions:	
There were no notes assigned to this job.	
Total records processed:	74
Validation Rules:	
General Validation Messages:	

File Submission

1

☒ Submit for final processing

☐ Process another file

START OVER

BACK

2

COMPLETE