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.
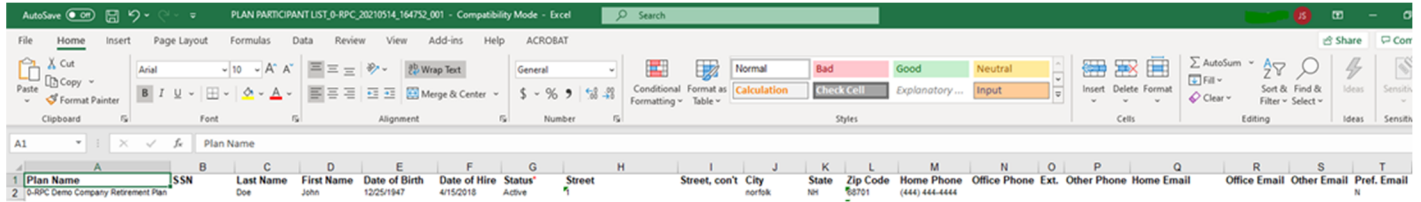
3) Click the **Submit** button.

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
    - 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.

Acceptable Phone Number Formats

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

Pref. Email Codes

Code	Definition
F	Office
H	Home
N	None *(Not Recommended)*
O	Other

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

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

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.

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.

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:	\\rlaspdxag2\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