



Update Employee Information

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

Visit <https://retirementplanconsultants.info> and click **Account Access**.

Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

Select role from dropdown menu: **Sponsor**

Click the **Login** button

A One-Time PIN (OTP) is required to login using multi-factor authentication (MFA). If you need additional guidance with the OTP process, click the **Guide to Logging in with MFA** link (located at the top of 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.

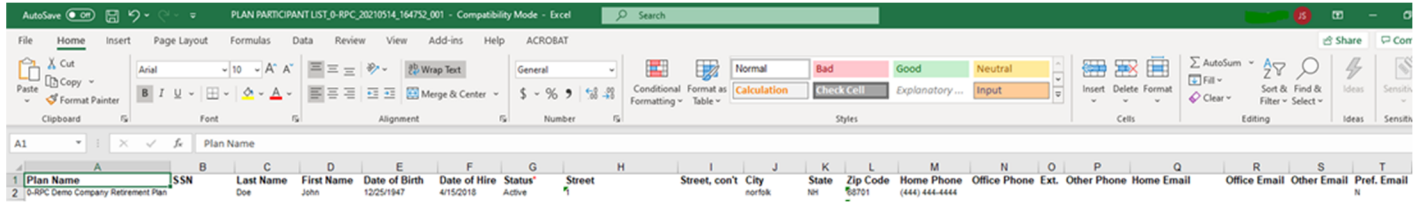
3) Click the **Submit** button.



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
 - If only one email is entered, enter the respective code in this field.
 - **'None'** is not recommended -- If this **'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 <i>(Not Recommended)</i>
O	Other

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

- Plan Name
- Social Security Number
- Status

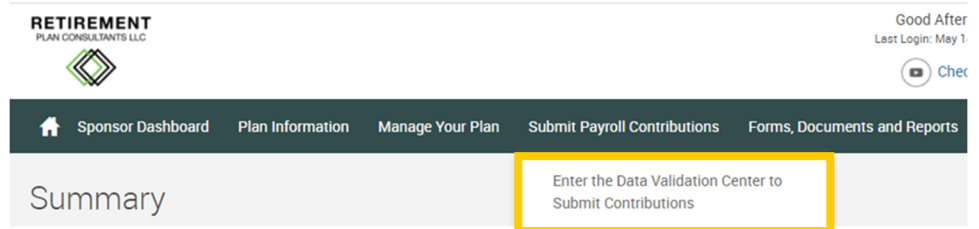
REMINDERS:

- 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.
 - At least one phone number AND
 - At least one email address



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



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

1

Process Method:

Upload a file containing the demographic data

2

Manually enter new employee information

Census - Dates and ...

DATA FORMAT

Work with existing demographic file

3

NEXT

1) Select **Demographic** from the Process selection dropdown list.

2) Click the **Upload a file** Process Method option.

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



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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.

The screenshot shows the 'Data Validation Center' interface. At the top, it displays 'Overall Progress: 50% Complete'. Below this is an 'Edit Data' section with various action buttons: Save, Undo, Delete, Refresh, Add All, Add New, Add Existing, Validate Records, Print Errors, Print Grid, and Download. The main content area shows a participant record for '*****0001, Vidal Dias, Jose'. A table below lists the data fields: New, Status, Social Security Num..., Name -..., Name - First, Date of Birth, Date of Hire - Original, and Address. The first row is highlighted in yellow and contains the values: Yes, Critical, *****0001, FirstName, LastName, 01/01/1989, and 123 Ma. Below the table is a pagination control showing 'Page 1 of 1' and '20 items per page'. At the bottom, there is a 'Warning' message box with the text: 'This participant does not have a phone number or email address on file. Please add at least one of each if possible.' Below the warning is an 'Error Description' box with the text: '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.' At the bottom of the interface, there are three buttons: 'START OVER', 'BACK', and 'NEXT'. The 'BACK' and 'NEXT' buttons are highlighted in yellow.

1

2

4

3



Update Employee Information

Review your import.

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

Data Validation Center

Overall Progress: **75% Complete**

Totals

File Import Results

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:	\\vlaspxag2\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

Submit for final processing **1**

Process another file

START OVER BACK **2** COMPLETE