Update Employee Information

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

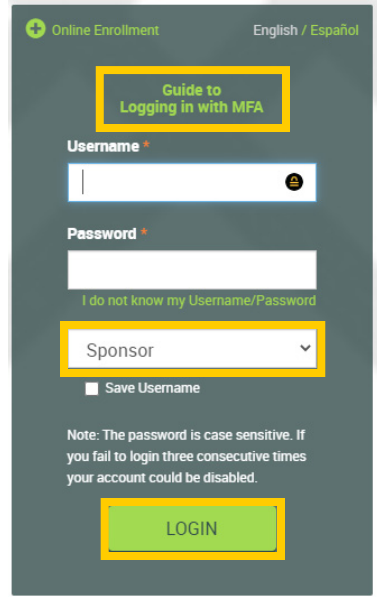
Visit https://retirementplanconsultants.info/login/

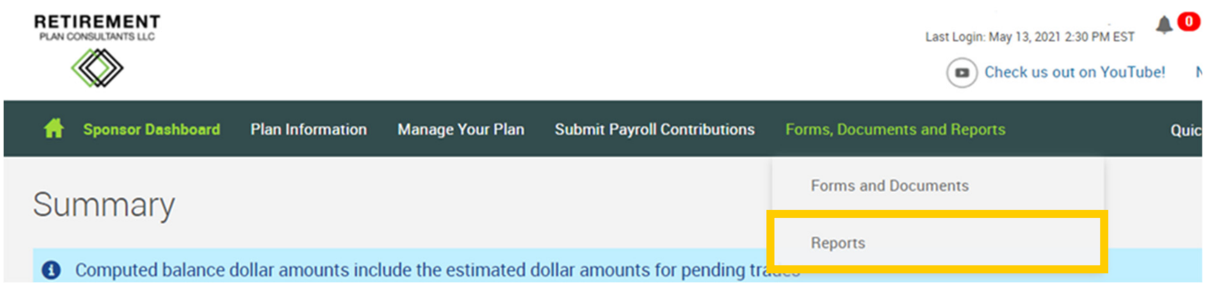
Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

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).



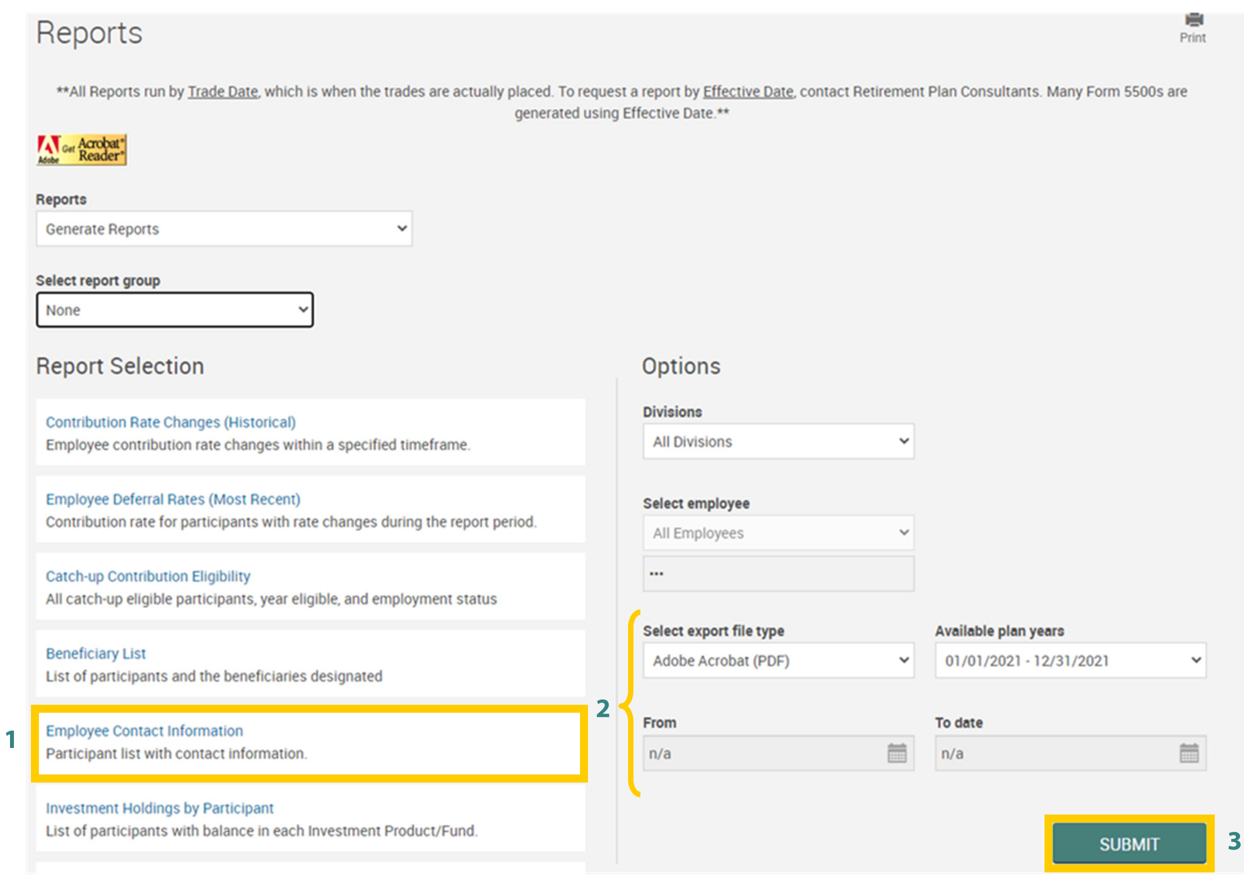


Click the **Reports** option under the **Forms, Documents and Reports** tab.

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.

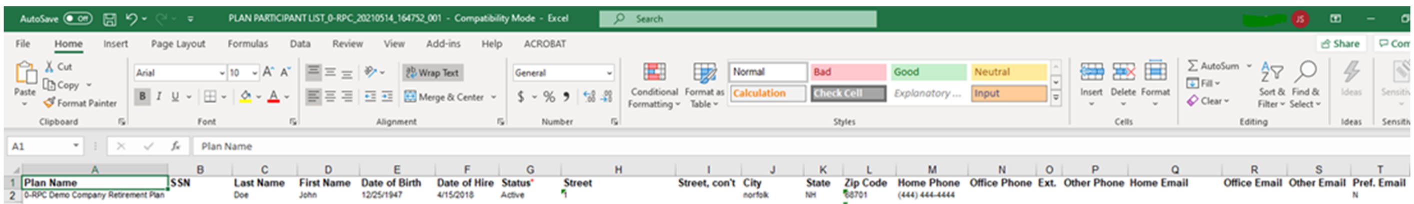
3) Click the **Submit** button.



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 <u>not recommended</u> -- If this '**None**' is entered participants will be unable to receive password reset links, or other emails regarding important account information.

Acceptable Phone <u>Number Formats</u>

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

<u>Pref. Email Codes</u>

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

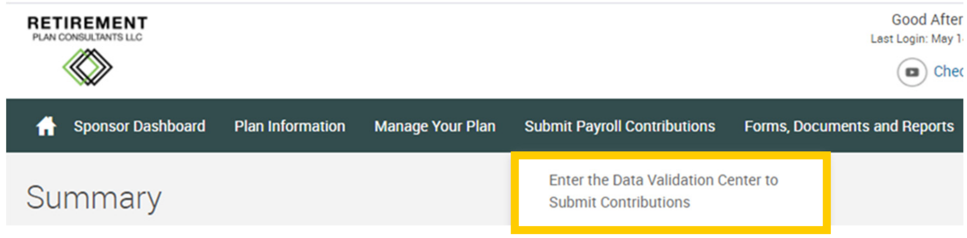
- Plan Name
- Social Security Number
- Status

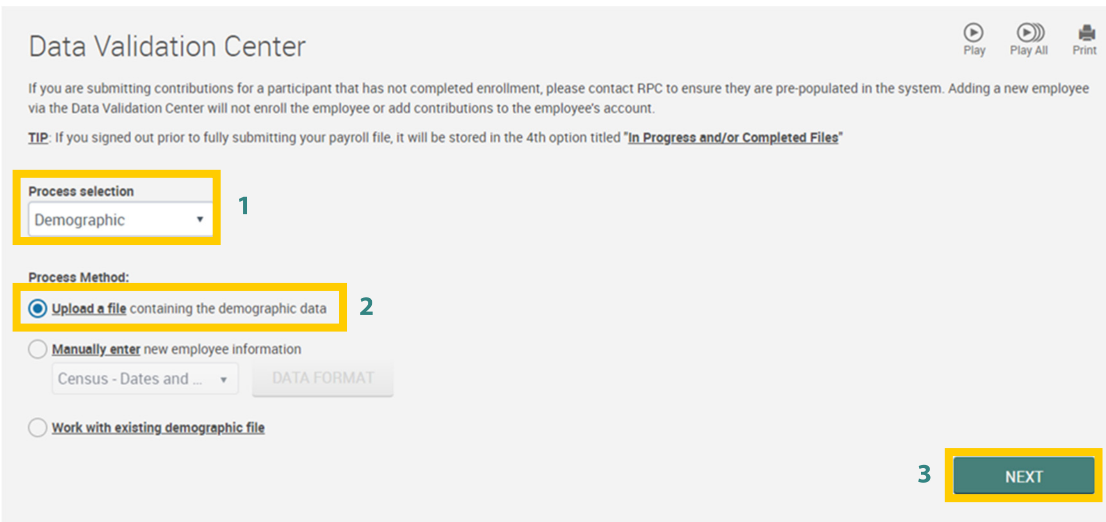
REMINDERS:

- 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.
  - <u>At least one</u> phone number AND
  - <u>At least one</u> 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.





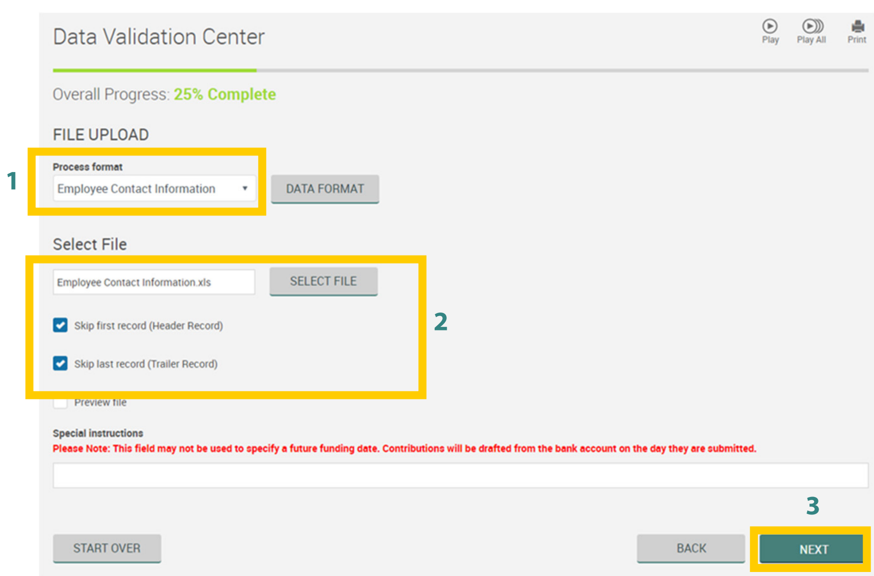
1) Select **Demographic** from the Process selection dropdown list.

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.



Update Employee Information

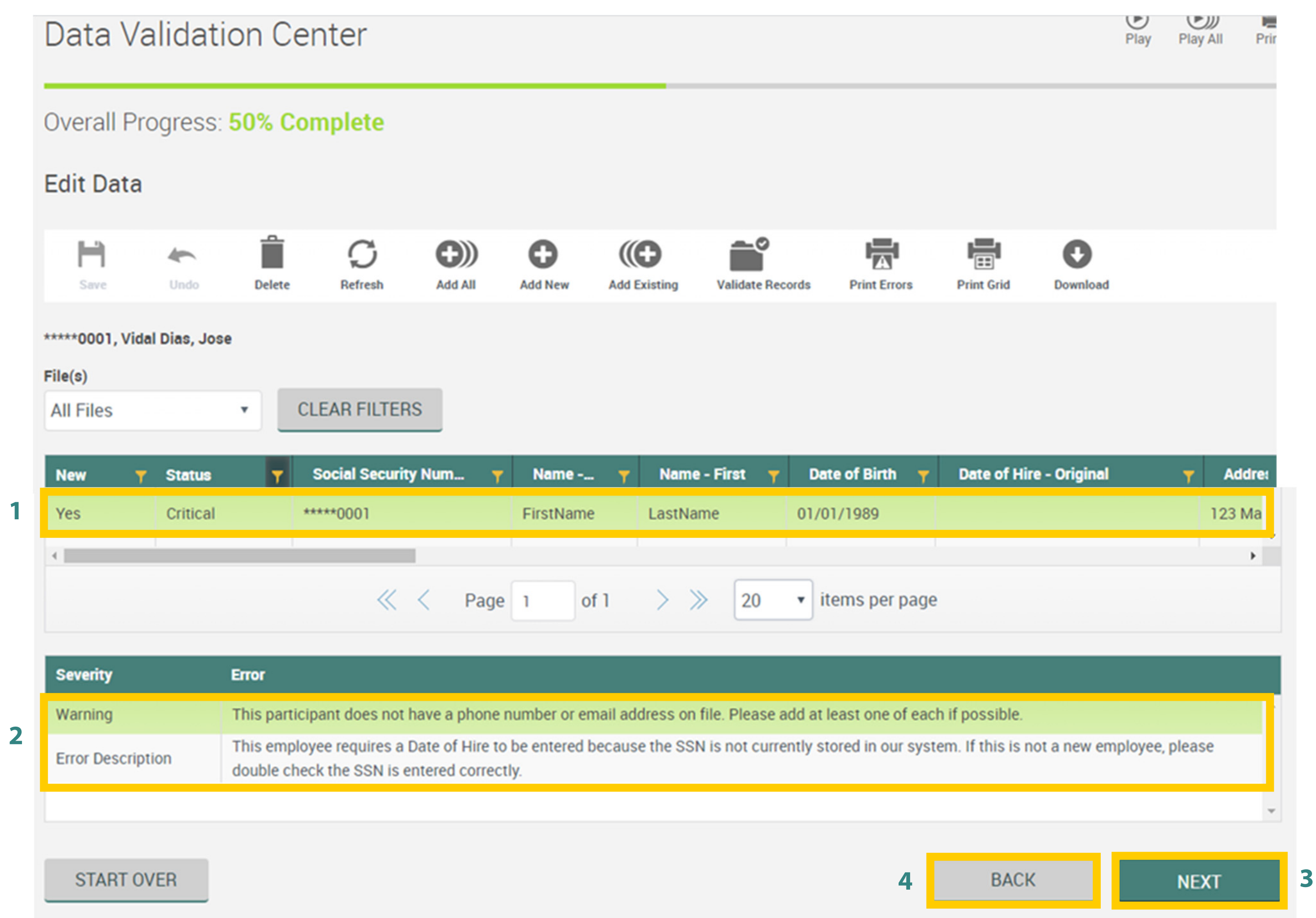
Review any warnings on the next screen to ensure the information is correct.

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.



Update Employee Information

Review your import.

1) Click the **Submit for Final Processing** option.

2) Click the **Complete** button.