

FIVE EASY STEPS TO UPDATE A PARTICIPANT RECORD

To offer you efficiency and ease in updating participant information almost immediately, we have a tool that will help you to make:

- ✚ Address changes
- ✚ Status updates (active to terminated or vice versa)
- ✚ Name changes
- ✚ Date of birth corrections
- ✚ Rehire updates
- ✚ Participant email address updates

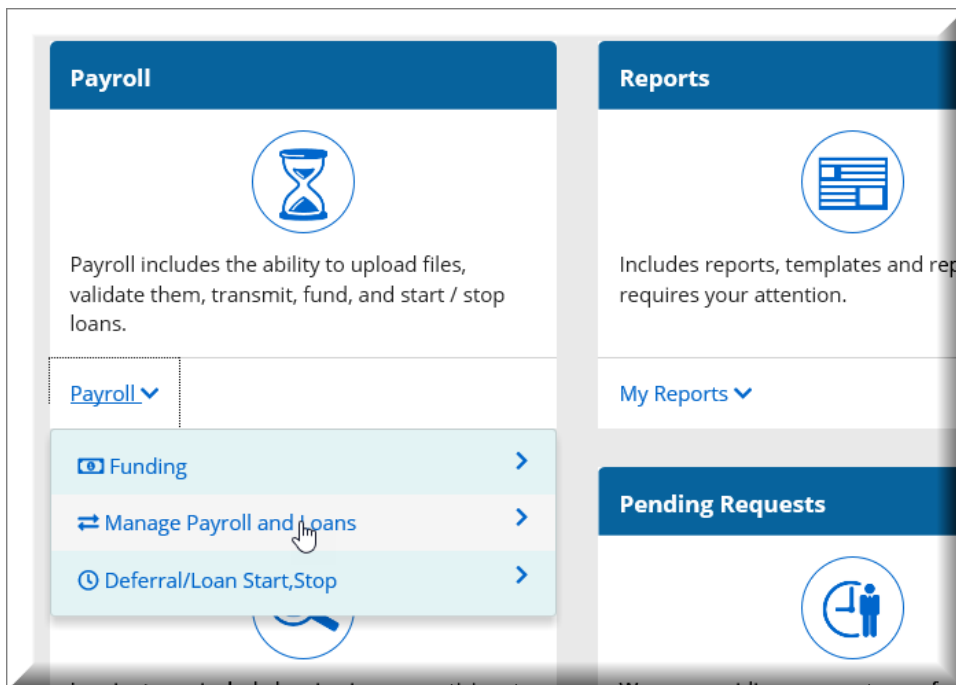
This feature is great for –

- ✓ Updating a newly separated participant's termination status and date – for those anxious to request a distribution prior to the next payroll run
- ✓ Updating an incorrect address and/or date of birth for an active employee who is or will be contacting our Participant Service Center prior to the next payroll processing
- ✓ Updating a terminated employee's status who had left employment long ago
- ✓ Making a name change for an employee who has recently married or divorced

Here are the 5 easy steps to follow:

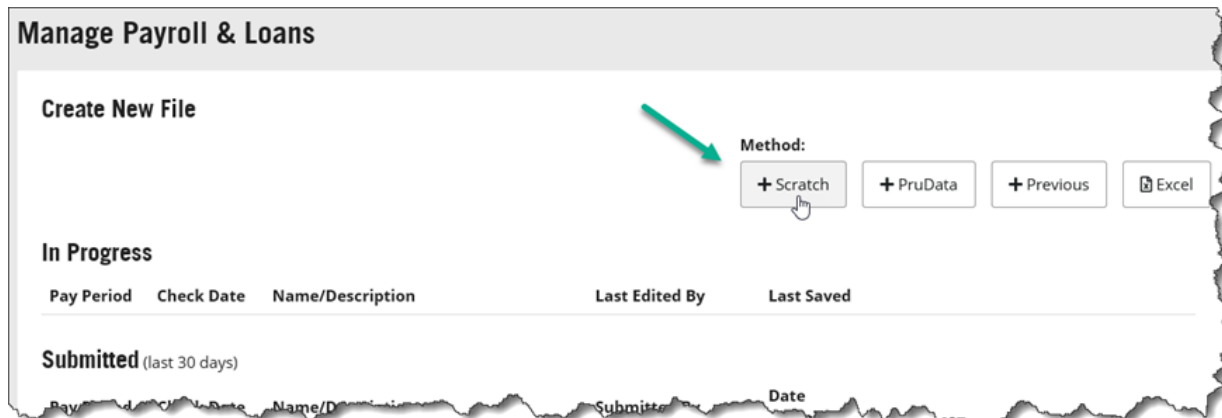
Step #1 –

Go to the Payroll Tile, click on the word “Payroll”, and then select ‘Manage Payroll and Loans’.



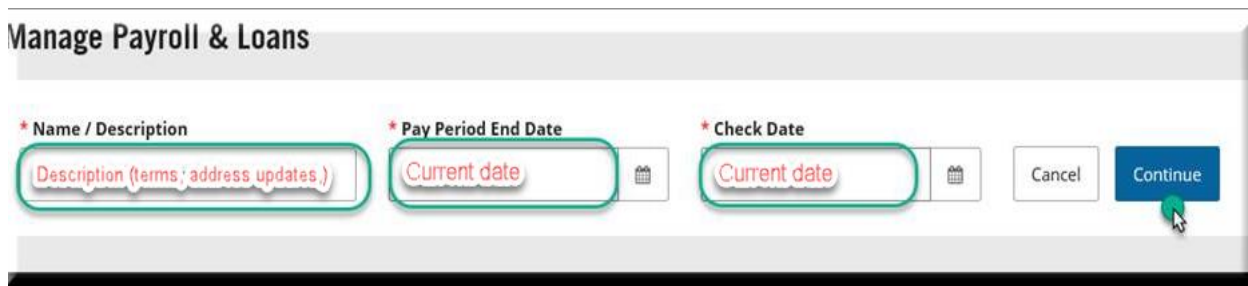
Step #2 –

Choose the ‘Scratch’ method.



Step #3 –

Assign a name to the file. This is for your reference only and can be anything you want it to be. Populate Pay Period End Date and Check Date with current date, then click on ‘Continue’.



Step #4 –

Click on the ‘Add Employee’ link, and then enter the SSN(s) of the participant(s) you are updating. After you have entered the SSN and clicked on the search icon, our system will bring up their record; click on ‘Add Employee’ to add them into this file. Do this for all participants you want to update.



Step #5 –

Scroll to the right until you find the field you need to update. After all the updates have been made, click ‘continue’ until you get to the end where you can click on the ‘Submit’ option. This page should reflect \$0.00 for contributions/loans as it is a non-financial submission. A confirmation message that the file was submitted for processing is provided.

Manage Payroll & Loans

Totals

Check your totals. Looks good? Go ahead and submit! Something wrong? You can [return to the previous screen](#) and look for errors

Description

Filename: Scratch Demo~01/10/2020
Pay period end date: 01/10/2020
Check date: 01/10/2020

Contribution Amounts

Total for ELECTIVE DEFERRALS	\$0
Total for MATCH	\$0
Total for QNEC	\$0
Total Contribution Amount:	\$0
Total Loan Amount:	\$0
Grand Total:	\$0

Back Cancel **Submit**

Depending on when you submit the file, updates will occur that evening or else within two business days!

IMPORTANT ITEMS TO NOTE

- When making participant updates via the Sponsor Center Website, you must remember to also update your system(s) to avoid overlaying the updated data.
 - ➔ If you submit your contribution files from your payroll system (text file), be sure to update your system so that the information matches
 - ➔ If you submit your contribution files via Manage Payroll and Loans on the website, any updates you make between file submissions will be reflected when creating your next contribution file
- Validations will run behind the scenes to ensure data integrity. It will detect if there is any missing, inaccurate, or incomplete data. You will be prompted to fix the perceived bad data with each data element needing attention being flagged for review.
 - ❖ **Red** = Critical errors that must be corrected before being able to proceed with submission.
 - ❖ **Orange** = Warning errors that appear to be suspicious. You may proceed with processing without correcting data.
- When updating a participant who has separated from service, you will need to update two fields:
 - Employee status field (i.e. terminated status); and,
 - Employee status date (i.e. term date)
- When updating an employee to leave or return from leave, you will need to update two fields:
 - 1) Sub Status (Leave Start or Leave Return); and,
 - 2) Sub Status Date (leave start date or leave return date)

As you update an employee for leave of absence, their account status **should remain active**.