



Adding or Updating Employees

Payroll & Employee Info Documents

Setup Payroll Integration

Submit Payroll Contributions

Add or Update Employee Info

Lookup Employee

Choose **Payroll & Employee Info** then
Add or Update Employee Info

Each page of the Data Validation Center has a **CLICK HERE FOR HELP** tab on right-hand side of the screen, reference this for more detailed information on each screen.

Data Validation Center

SELECT THE PROCESS YOU WANT TO USE.

Payroll: Use this process to submit Payroll Data.

Add/Update Employees: Use this process to add or update Employee Information.

****Click the tab on the right for HELP!****

Check the [Plan Sponsor Resource Center](#) for helpful guides.

Process selection

Add/Update Employ...

Method of Submission

☒ **Upload a file** containing employee data - [Click Here to Review the File Layout](#)

☐ **Manually enter** employee information

Add/Update Employ... DATA FORMAT

☐ **In Progress Files** - Use this option if you previously submitted employee changes but signed out before submitting.

NEXT

CLICK HERE FOR HELP

Choose your method of submission
The recommended methods are:

- Upload a File
- Manually Enter

Use the **In Progress** option if you started entering data, but signed out before completing the submission. **For Payroll**, this is also where you can view recently **completed** files.

Select **Add/Update Employees** from the **Process selection** dropdown.

Choose your **Method of Submission**.

Click **NEXT**.

Data Validation Center

SELECT THE PROCESS YOU WANT TO USE.

Payroll: Use this process to submit Payroll Data.

Add/Update Employees: Use this process to add or update Employee Information.

****Click the tab on the right for HELP!****

Check the [Plan Sponsor Resource Center](#) for helpful guides.

1) Process selection

Add/Update Employ...

2) Method of Submission

☒ **Upload a file** containing employee data - [Click Here to Review the File Layout](#)

☐ **Manually enter** employee information

Add/Update Employ... DATA FORMAT



Adding or Updating Employees

Data Validation Center

Overall Progress: **25% Complete**

FILE UPLOAD

File Layout

Add/Update Employee ▼

DATA FORMAT

Select File

SELECT FILE

☐ Skip first record (Header Record)

☐ Skip last record (Trailer Record)

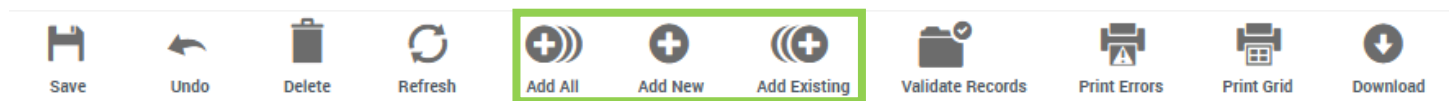
☐ Preview file

If you are uploading a file, the columns **must** match the elements specified in the **DATA FORMAT** button.

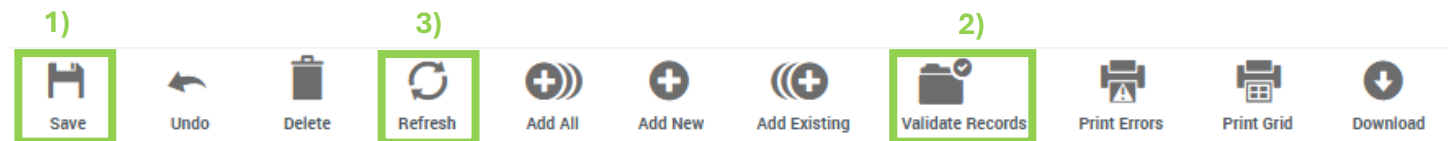
SELECT FILE and browse for your import file.

Make selections to skip any records or preview the file and click **NEXT**.

If you are manually entering employee information, choose **Add All**, **Add New**, and/or **Add Existing** and enter the participant information accordingly.



After entering all employee data, click **Save**, then **Validate Records**, **Refresh**, and check the Status column for Errors.





Adding or Updating Employees

Records with a **Critical status must be corrected** or the information will not be imported for that participant. To view and correct errors for an employee, select the row with the error and review the details displayed in the lower section of the page.

New	Status	Social Security Num...	Name - First	Name - ...	Date of Birth	Date of Hire - Original	Termi
Yes	Critical	*****6789	Test	Employee			

<< < Page 1 of 1 > >> 20 items per page

Severity	Error
Error Description	This employee requires a Date of Birth 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.
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.
Error Description	You must add a zip code for this employee

Once any errors have been addressed select **Refresh** from the menu bar then click **NEXT**.

Again, reference the **CLICK HERE FOR HELP** tab on the right-hand side for more detailed information.



Adding or Updating Employees

Review the information on the **File Import Results** page and if everything appears correct, select “Submit for final processing” or “Process another file” then click **COMPLETE**.

Data Validation Center

Overall Progress: **50% Complete**

Totals

File Import Results

PRINT REPORT

Import Census Report

Job Status:	Warnings
Plan ID:	0Demo
Plan name:	0 RPC Demo Retirement Plan
DER name:	Add/Update Employee
Mode:	Validate Only
Transfer processed on:	08/12/2025

Execution Errors			
Error #	Description		Severity
1	The DER definition indicates that the 'Replace existing dates with input' option is turned off or the 'Add import value to existing amount' option for numeric fields is in use. No census audit records will be written for imported data.		Warning

Special Instructions

There were no notes assigned to this job.

Existing employees updated:	0
New employees added:	1
Total employees transferred:	1
Total employees NOT transferred:	0
Client import errors:	0
Oracle server import errors:	0

List of new employees			
SS #	Last Name	First Name	
*****789	Employee	Test	

Validation Rules

General Validation Messages

File Submission

Review the Validation Rules above: If any of the rules have a Critical severity, click the 'Back' button to correct them before submitting; otherwise the data for that employee will not be imported.

☒ Submit for final processing

☐ Process another file

START OVER

BACK

COMPLETE