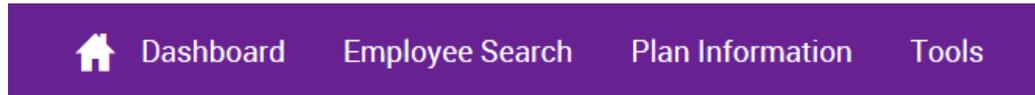


Instructions for manually editing employment status in pwe

- Hover over Tools
- Click on Data Validation Center



Data Validation Center

- Click on “Manually enter new employee information”
- Click on “Next”



Data Validation Center

NOTE: Participant records uploaded with errors (e.g., invalid Social Security number) do not load into the system. Instead, errors are flagged and the records stored in a pending file. You may manually correct the records from the pending file or upload a corrected demographic file to resolve the errors. Please contact us at 866-499-3273 or customerservice@planwithease.com if you have questions or need assistance.

Process Selection:

Demographic

Process Method:

Upload a file containing the demographic data

Manually enter new employee information

Demographic File

DATA FORMAT

Work with existing demographic file

NEXT

- Click on “Add Existing”

Data Validation Center

Overall Progress: **0% Complete**

Edit Data



Save Undo Delete Refresh Add All Add New Add Existing

File(s)

All Files CLEAR FILTERS

- Click on “Find name” and enter either first, last, or both names
- When name appears, click on “Add” under “Select EE”
- Click on “Continue”

Add Employee Records

Create employee records by using the Search criteria section to locate specific employees that are not already in the file.

Search Criteria

Find name

First name Last name

Jane Doe

Find SS#

 **SEARCH**

Social Security #	Name	Select EE
	Doe, Jane	Add

Page 1 of 1 50 items per page

Add Records

Social Security #	Name	Remove EE
	Doe, Jane	Remove

CANCEL CONTINUE

- Change “Plan Status Code” to “Inactive”
- Change “Plan Status Date” to the person’s termination date

Data Validation Center

Overall Progress: **0% Complete**

Edit Data

 Save
  Undo
  Delete
  Refresh
  Add All
  Add New
  Add Existing
  Validate Records
  Print Errors
  Print Grid
  Download

012345678, Doe, Jane

File(s)

Office Phone Extension	Phone - Other	Plan Status Code	Plan Status Sub Code	Plan Status Date (MM/DD/YY...
		Inactive		05/31/2017

- Change Employment Status Code to “Terminated” or “Retired”
- Change “Employment Status Date” to the person’s termination date
- Click on “Next” (not shown here)

Edit Data

 Save
  Undo
  Delete
  Refresh
  Add All
  Add New
  Add Existing
  Validate Records
  Print Error

012345678, Doe, Jane

File(s)

...	Employment Status Code	Employment Status Sub Code	Employment Status Date (MM...
	Terminated		05/31/2017

- Click on “Submit”
- Done!

Overall Progress: **50% Complete**

Totals

File Import Results

PRINT REPORT

Import Census Report

Job Status:	Successful
Plan ID:	452
Plan name:	Benton Community School District 403(b) Plan
DER name:	Demographic File
Mode:	Validate Only

Transfer processed on: 04/27/2018

Execution Errors

None

Special Instructions

There were no notes assigned to this job.

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

File Submission

Submit for final processing

Process another file

START OVER

BACK

SUBMIT