Mutual of America Financial Group℠

Retirement Services • Investments

Data Validation Web (DVW) Introduction

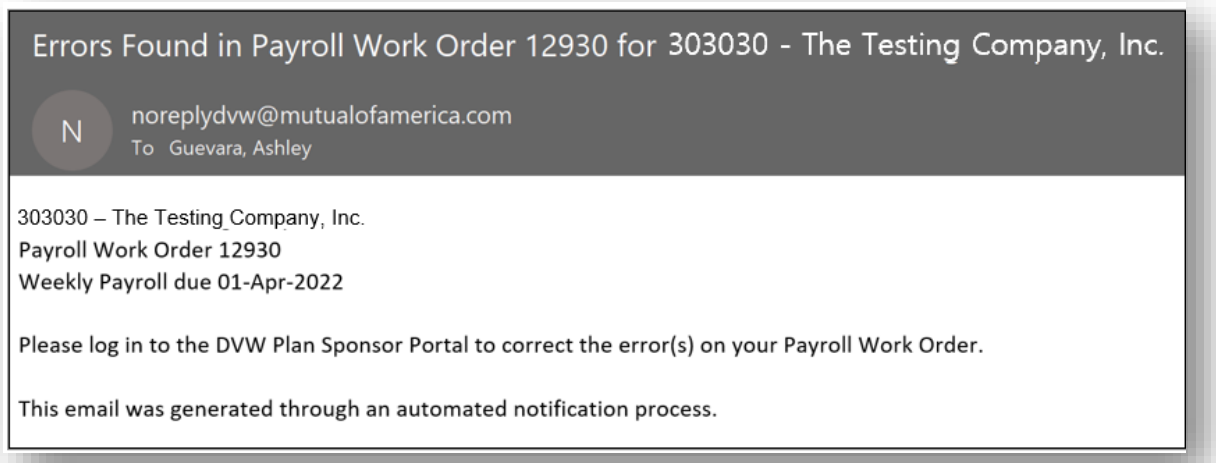
DVW Introduction

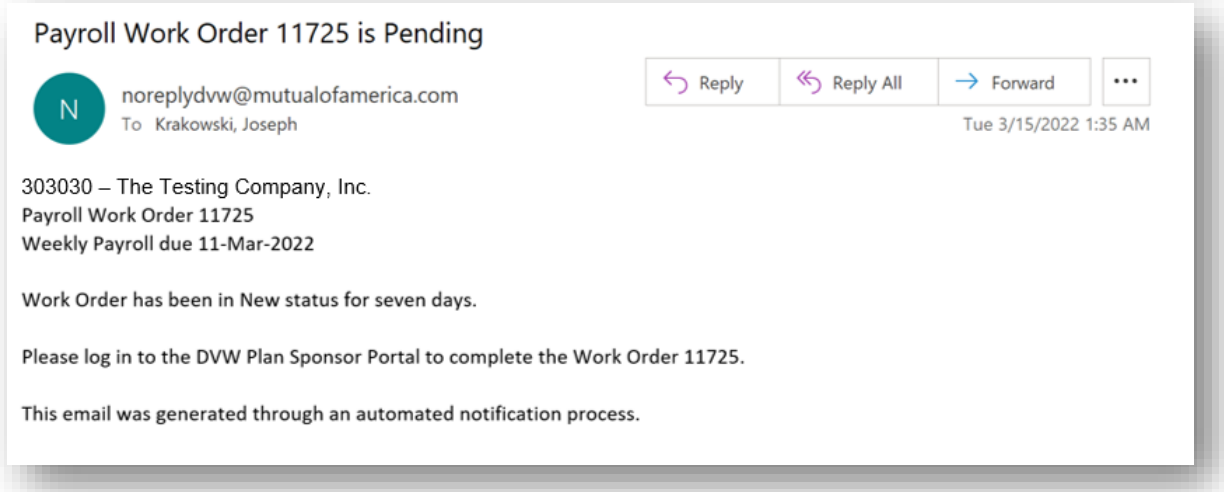
- System-Generated Emails
- Connecting to the DVW Portal
- DVW Work Orders
- Correcting Validation Errors
- Next Steps

System-Generated Emails

- Many DVW activities will generate emails from noreplydvw@mutualofamerica.com.

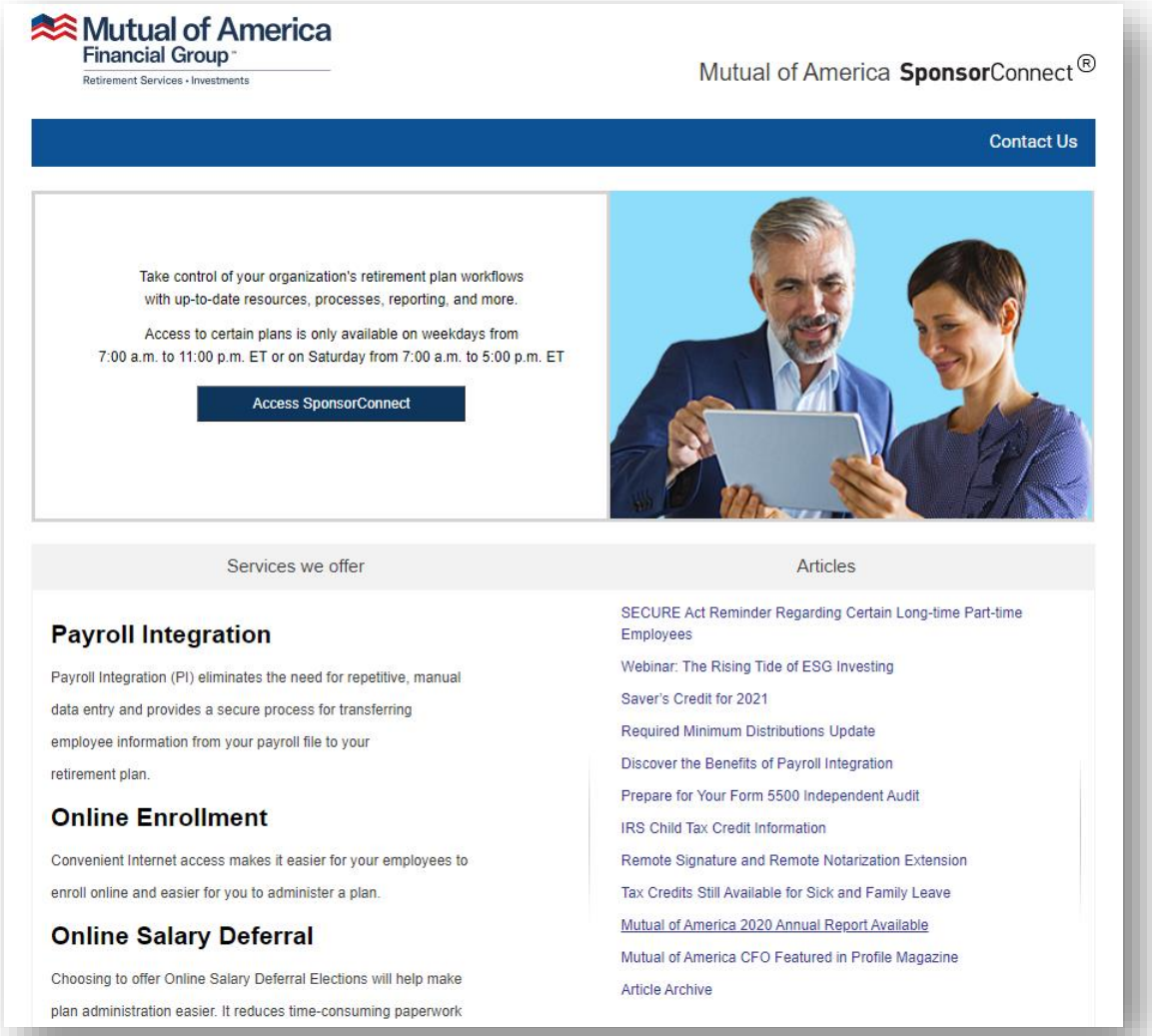
- You'll receive these emails when you or your CRM are working in DVW.





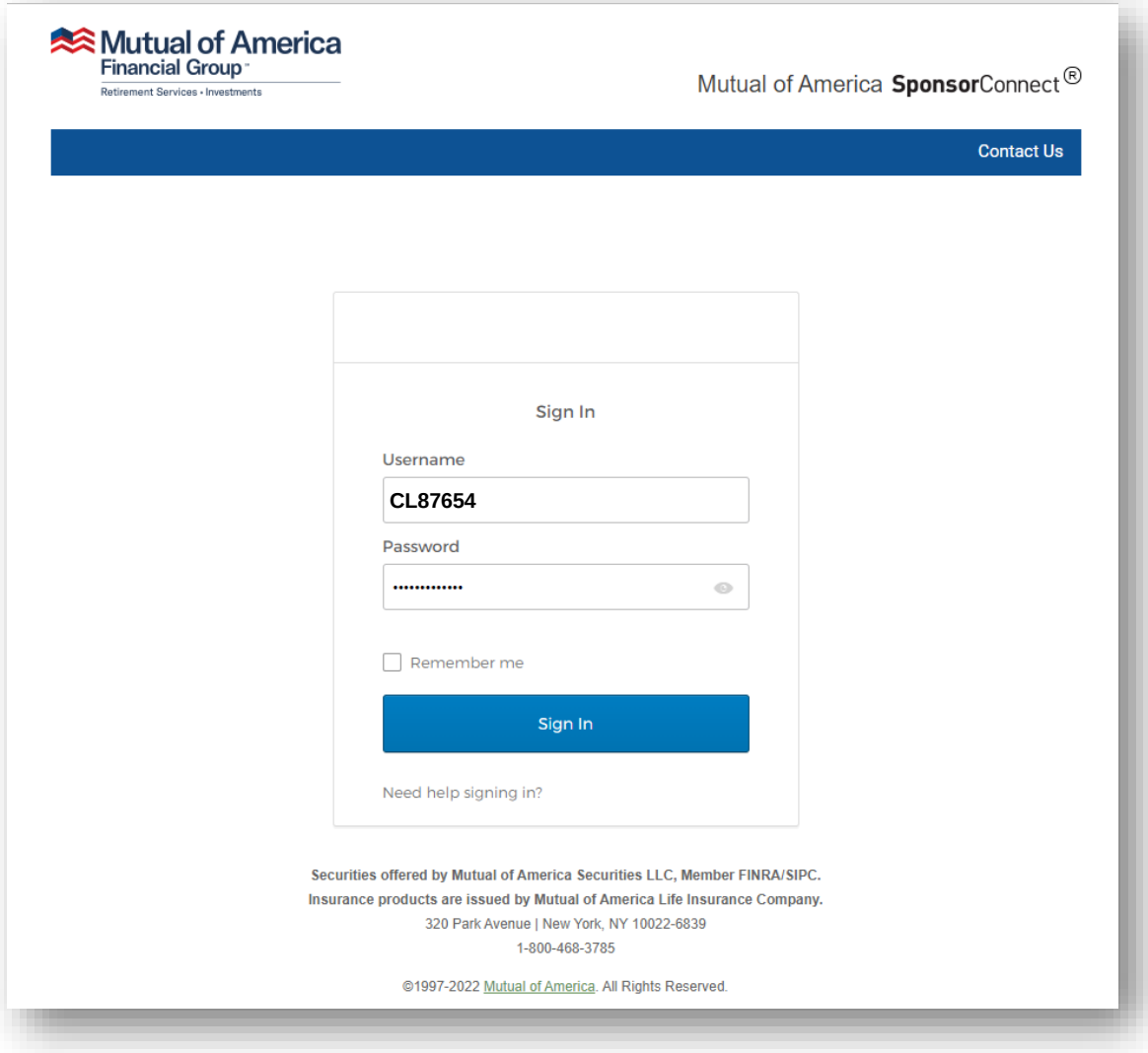
Connecting to the DVW Portal

- Portal Access
  - Begin by accessing Mutual of America SponsorConnect®.



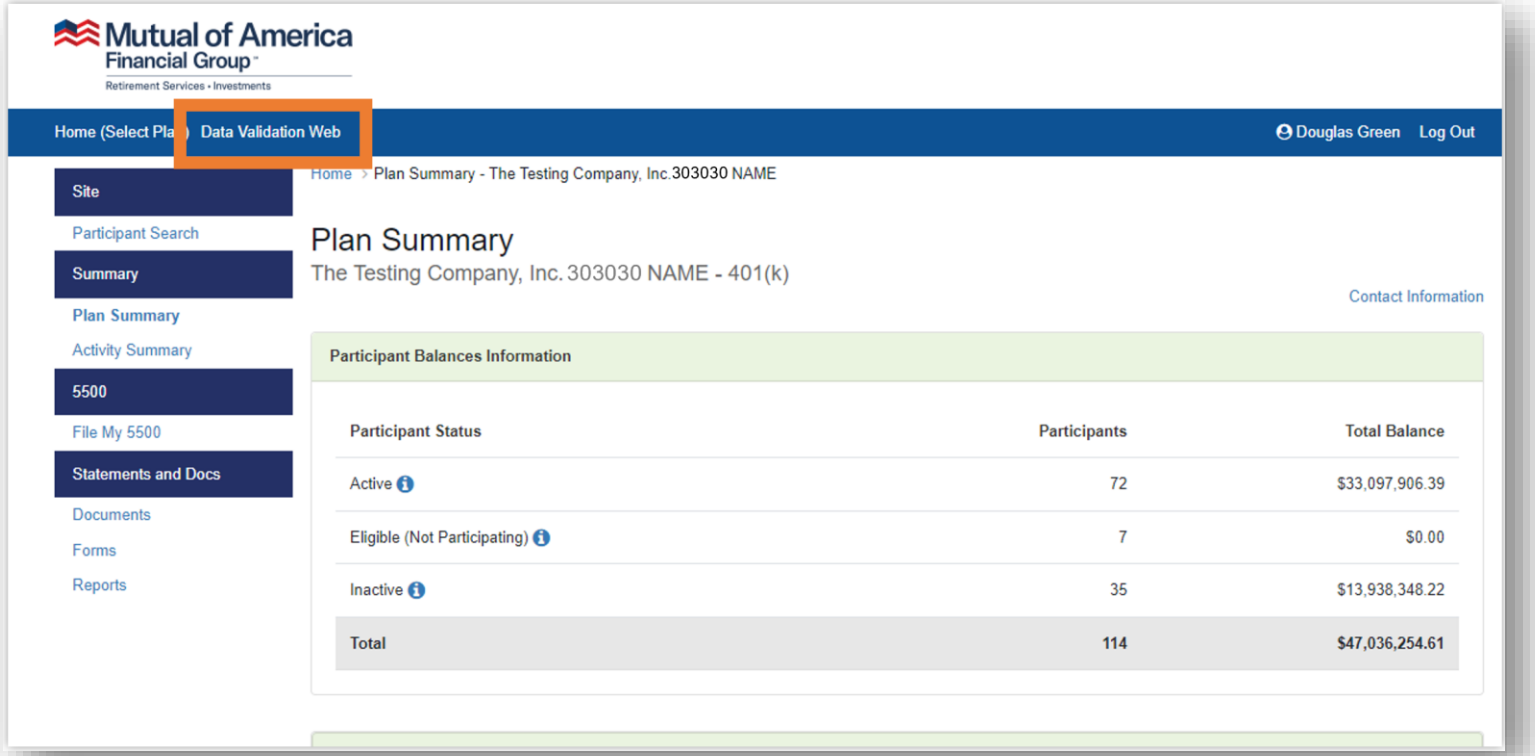
Connecting to the DVW Portal

- Your credentials are unchanged.
  - Letters in your Username are ALL CAPS.



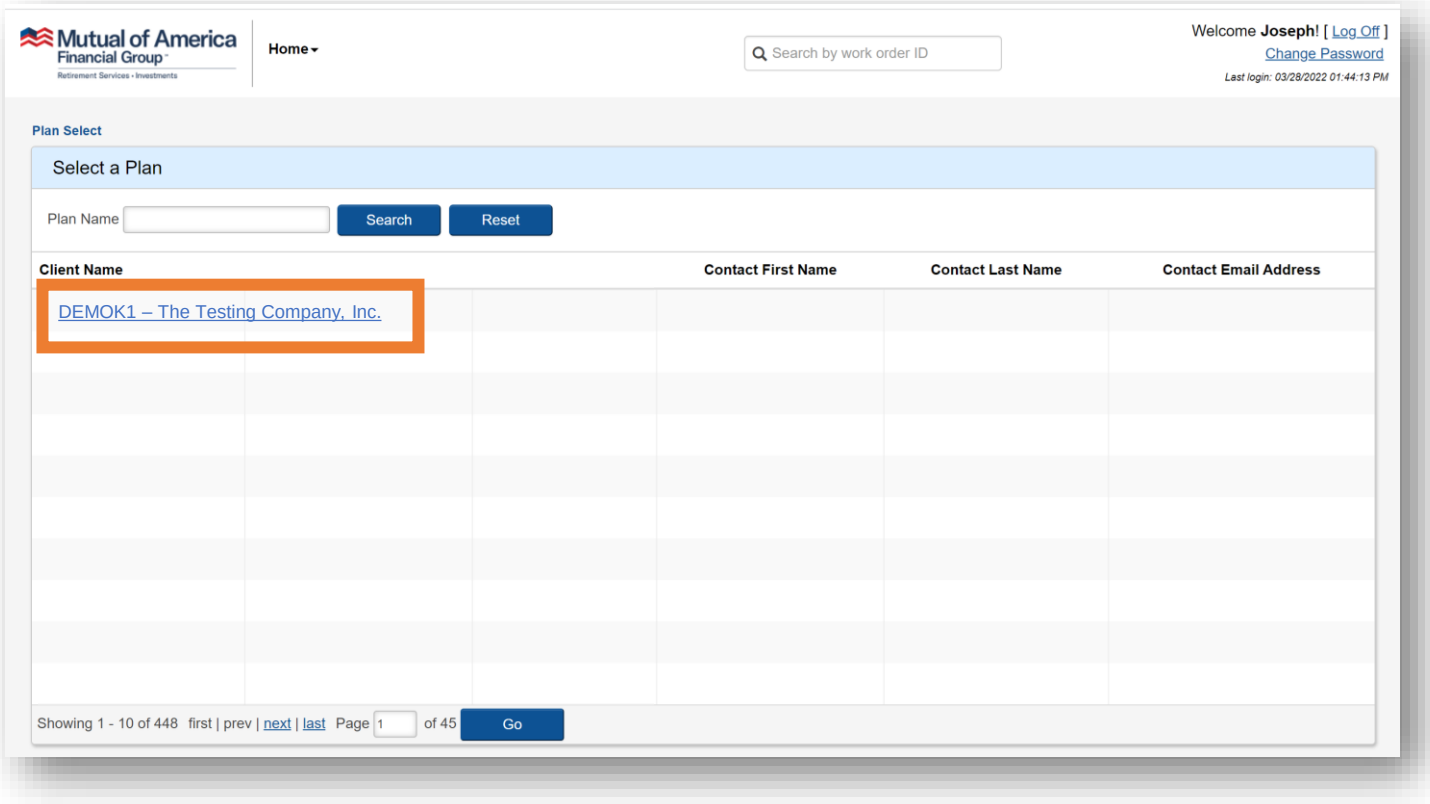
Connecting to the DVW Portal

- If ALL of your plans have been migrated to DVW, you will access the new portal from the Data Validation Web link on the Plan Summary page.



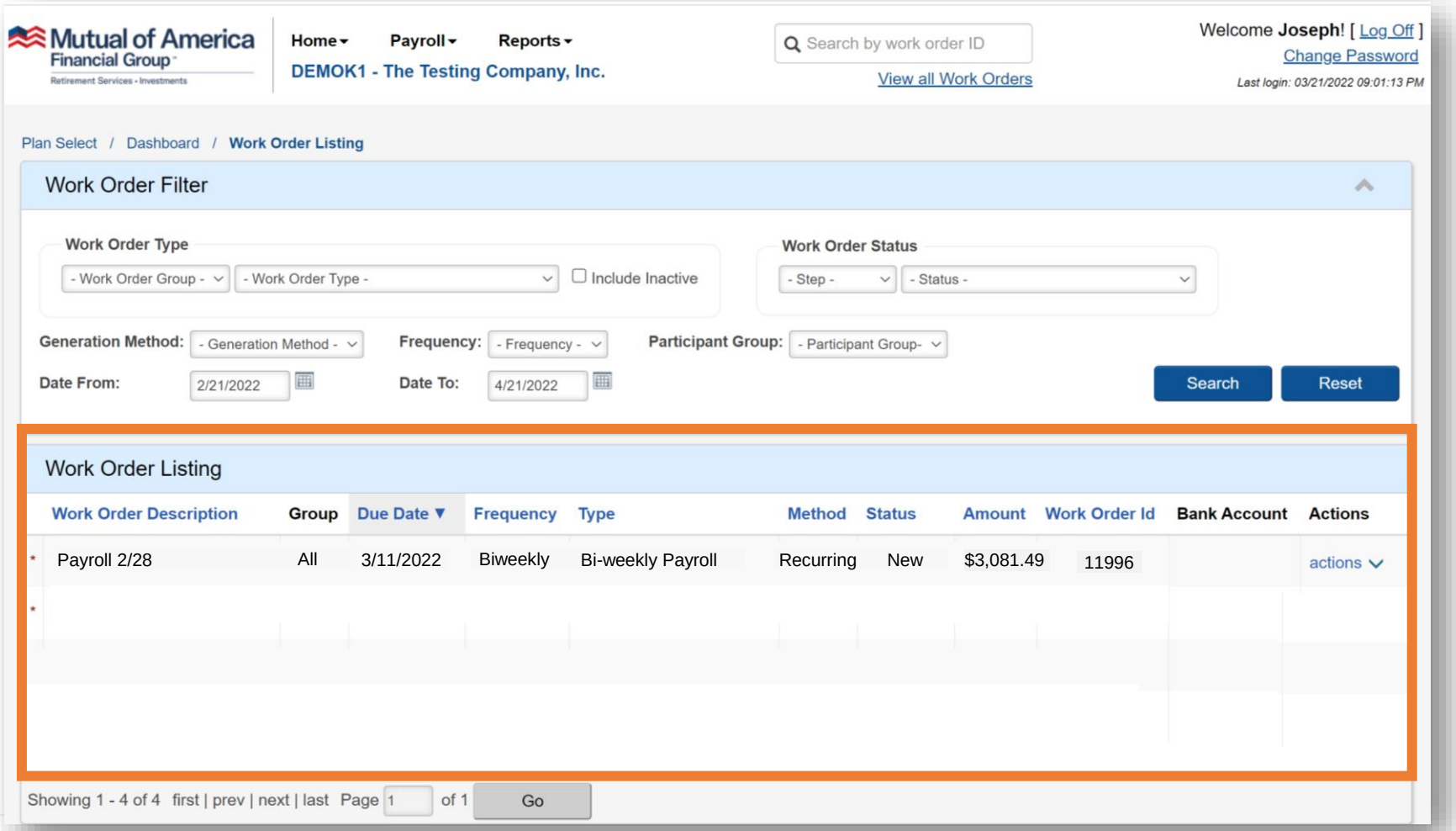
Connecting to the DVW Portal

- The DVW portal will be displayed.
- If the Select a Plan page appears, click the plan that you want to work on.



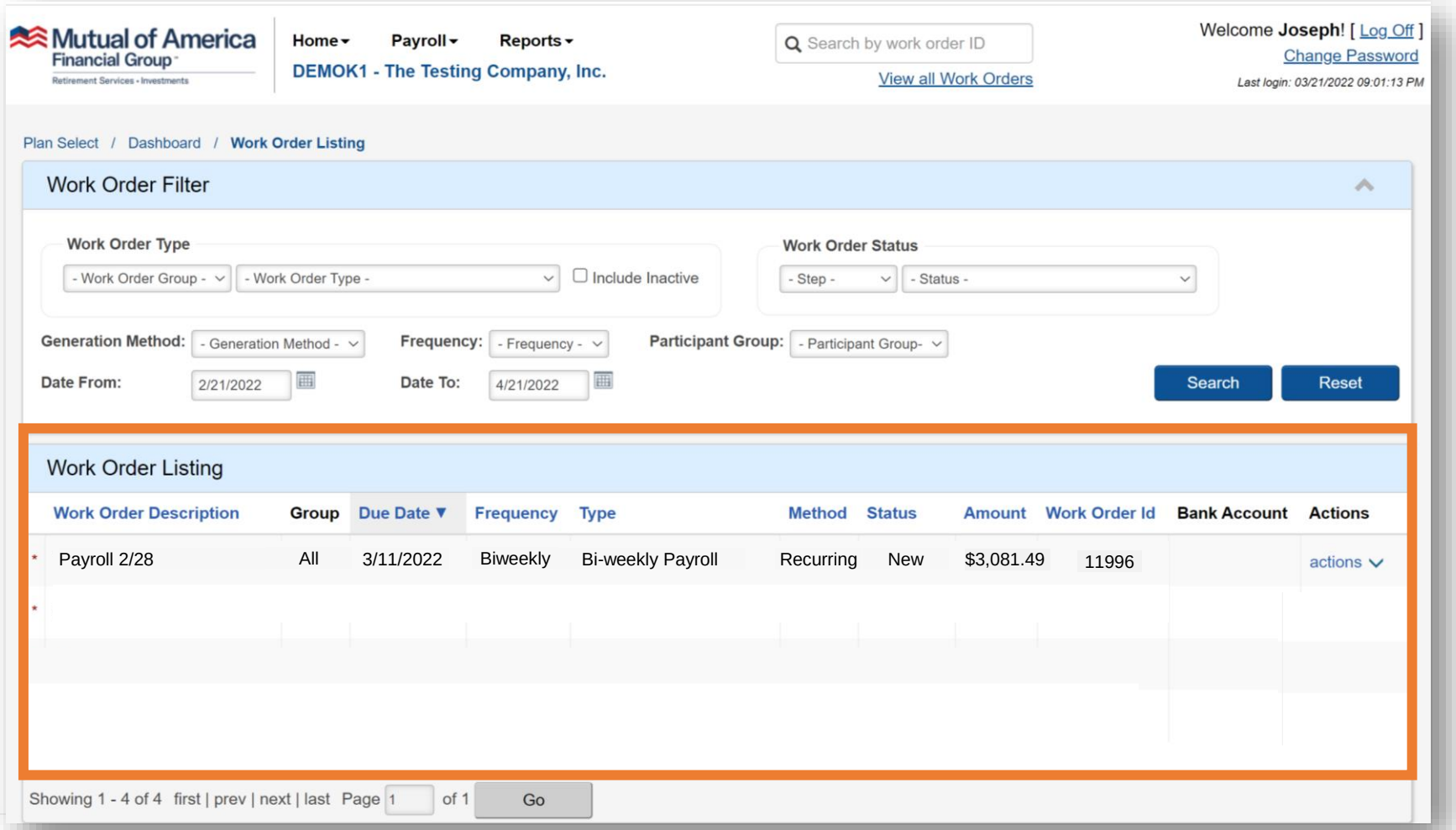
Connecting to the DVW Portal

- The Work Order Listing for that plan will be displayed.



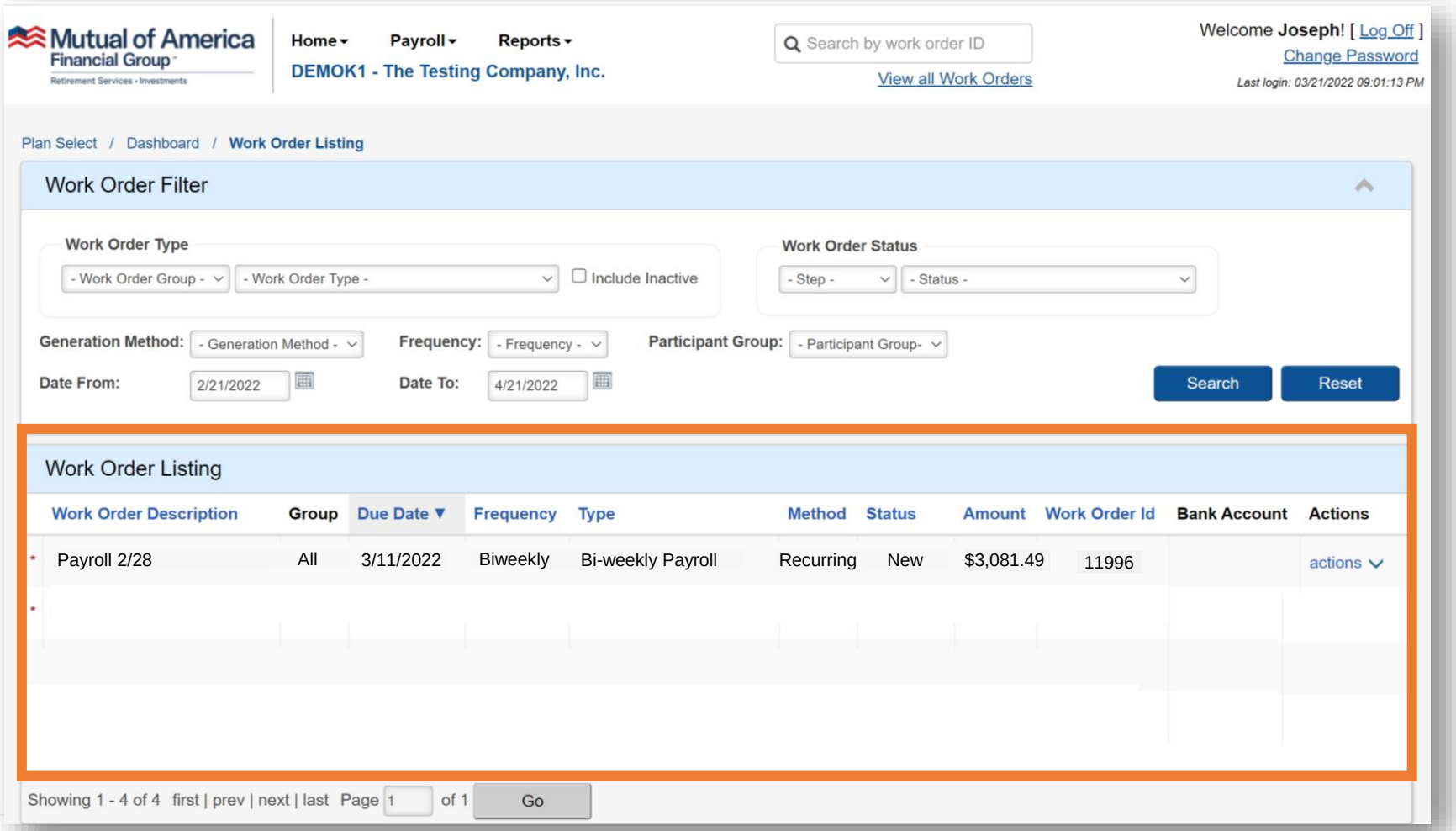
Connecting to the DVW Portal

- Payroll Work Orders are created to remit payments.
- Payroll Work Orders are generated automatically and are timed to your payroll frequency.



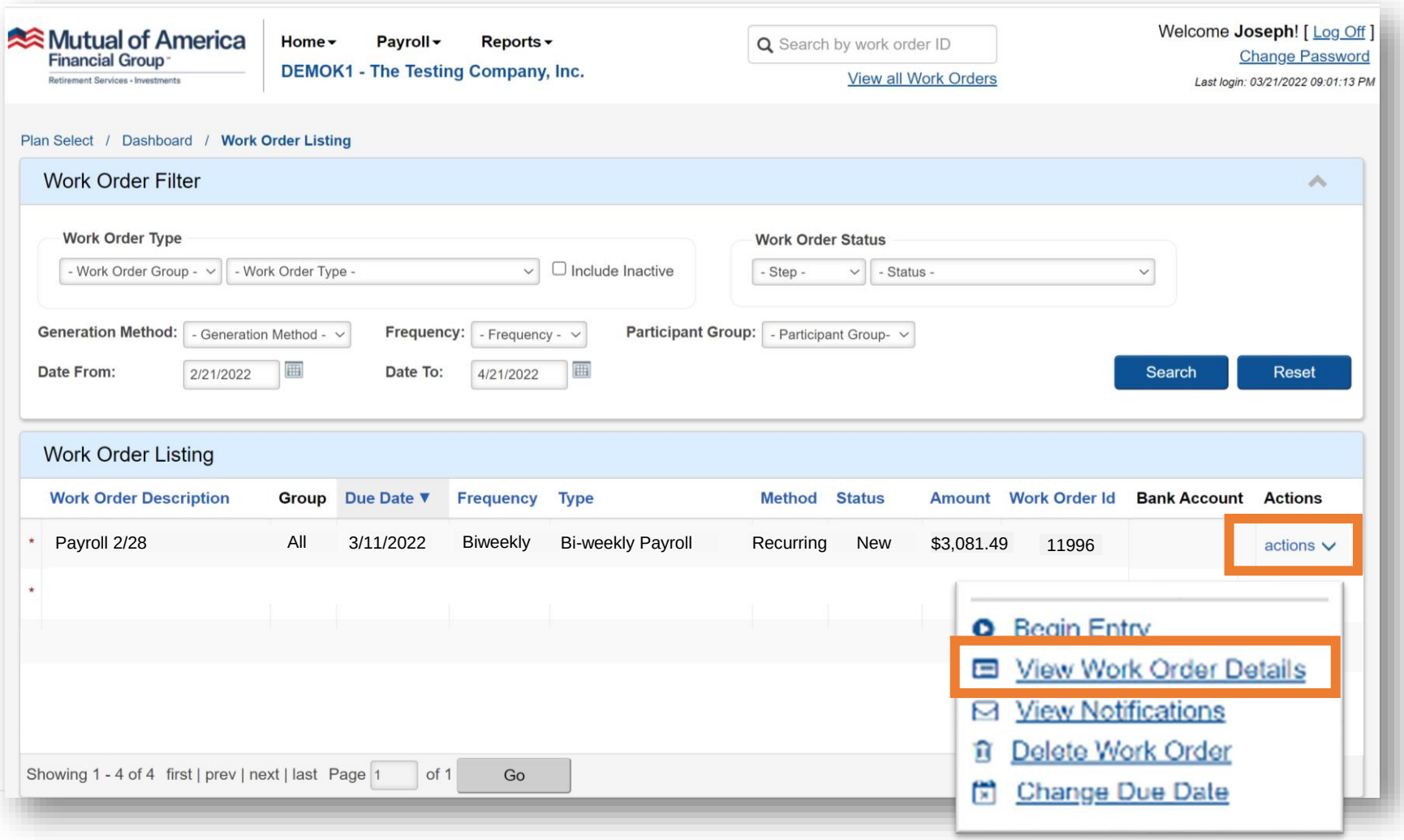
Connecting to the DVW Portal

- The Work Order will appear in the Work Order Listing in advance of your payroll date with a status of “New.”
- The most recent Work Order will appear at the top of the list.



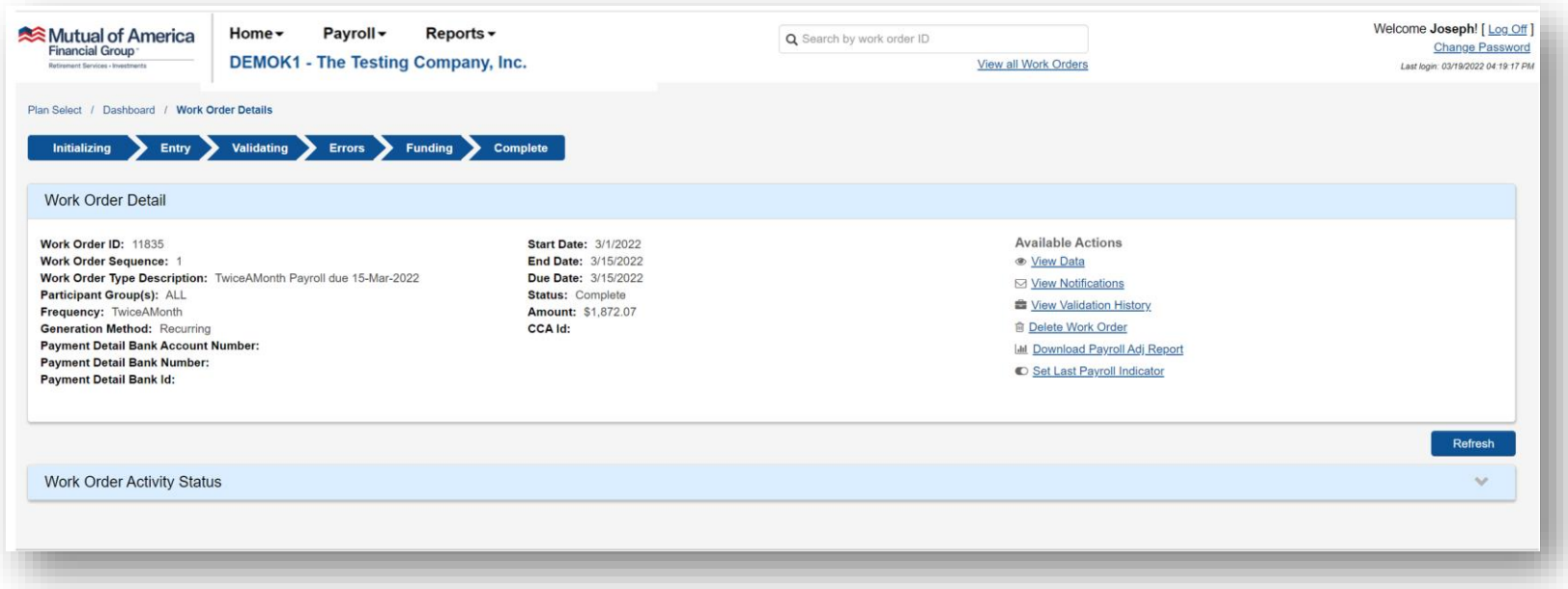
Connecting to the DVW Portal

- Payroll Work Orders have a specific workflow.
  - The workflow steps can be seen by clicking on the Actions menu (to the right of the Work Order) and selecting the View Work Order Details option.



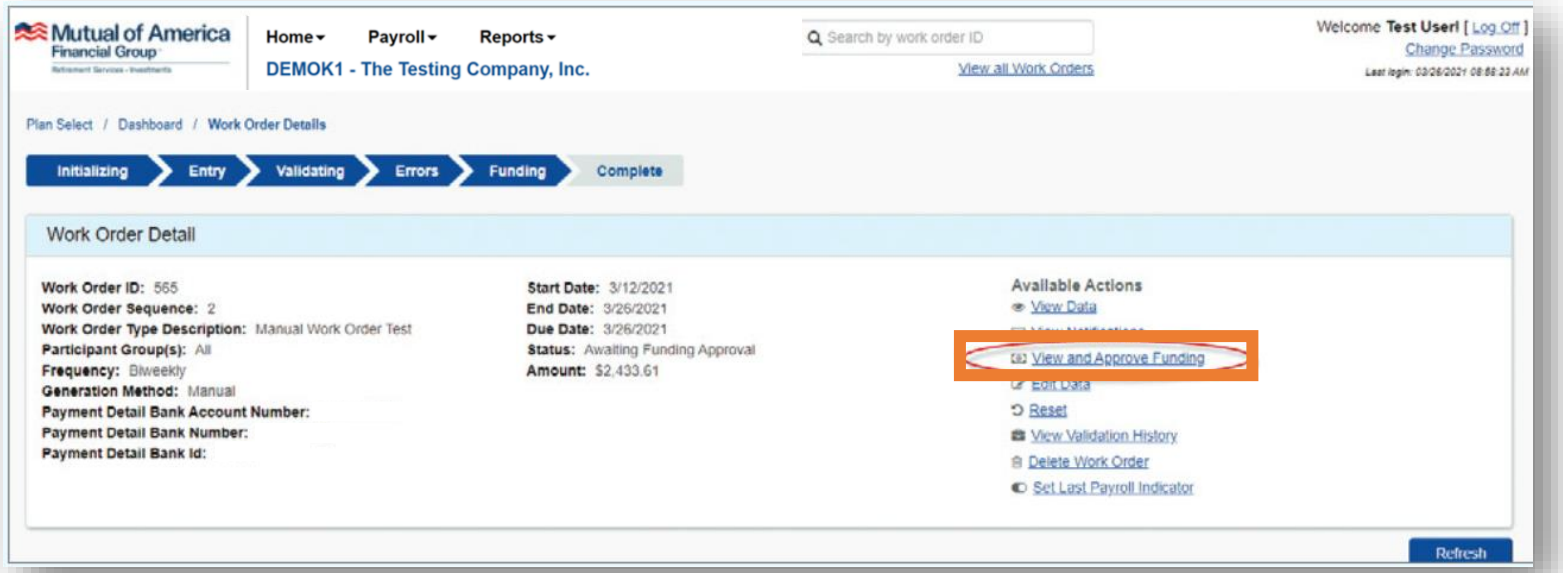
DVW Work Orders

- Scenario #1:
  No discrepancies are found, and you have chosen automatic confirmation.
  - In this scenario, the workflow advances to the Complete step.
    - The funding process begins.
    - The data from the payroll file is transferred to the recordkeeping system.



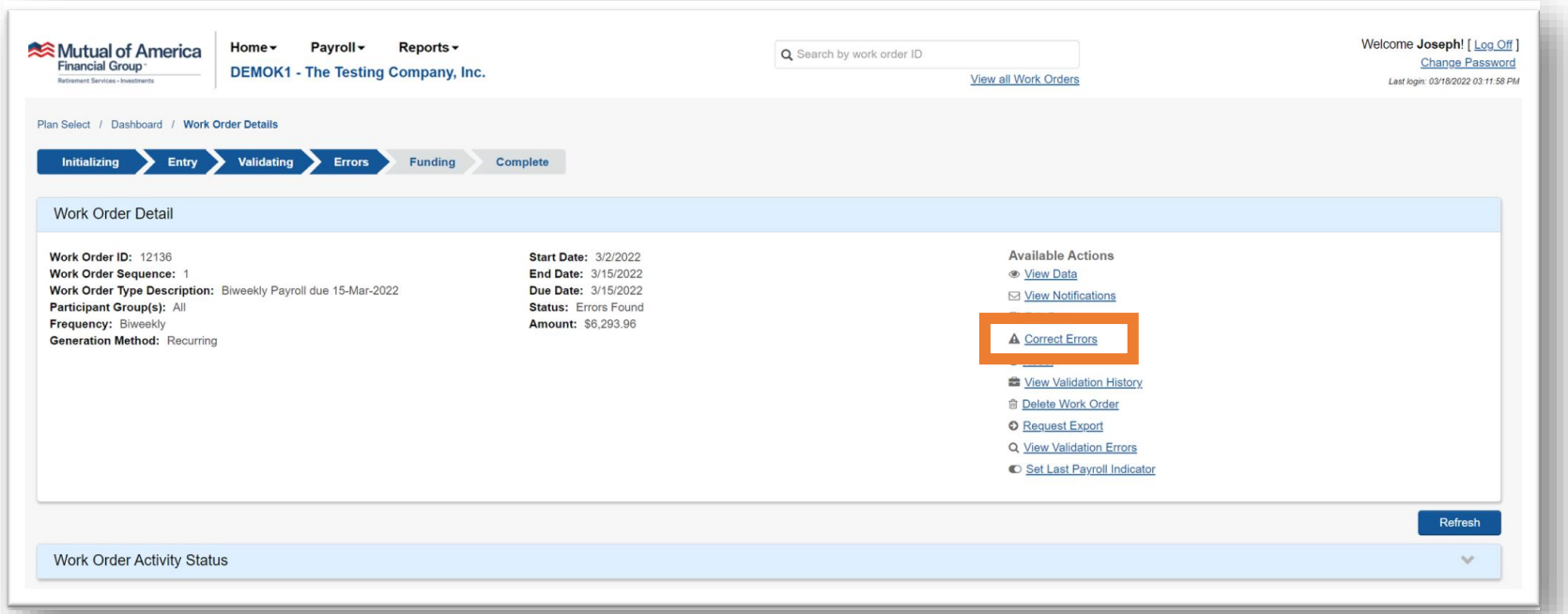
DVW Work Orders

- Scenario #2:
  No discrepancies are found, and you have chosen manual confirmation.
  - In this scenario, the workflow advances to the Funding step.
    - Use the View and Approve Funding link to advance the workflow to the Complete step.



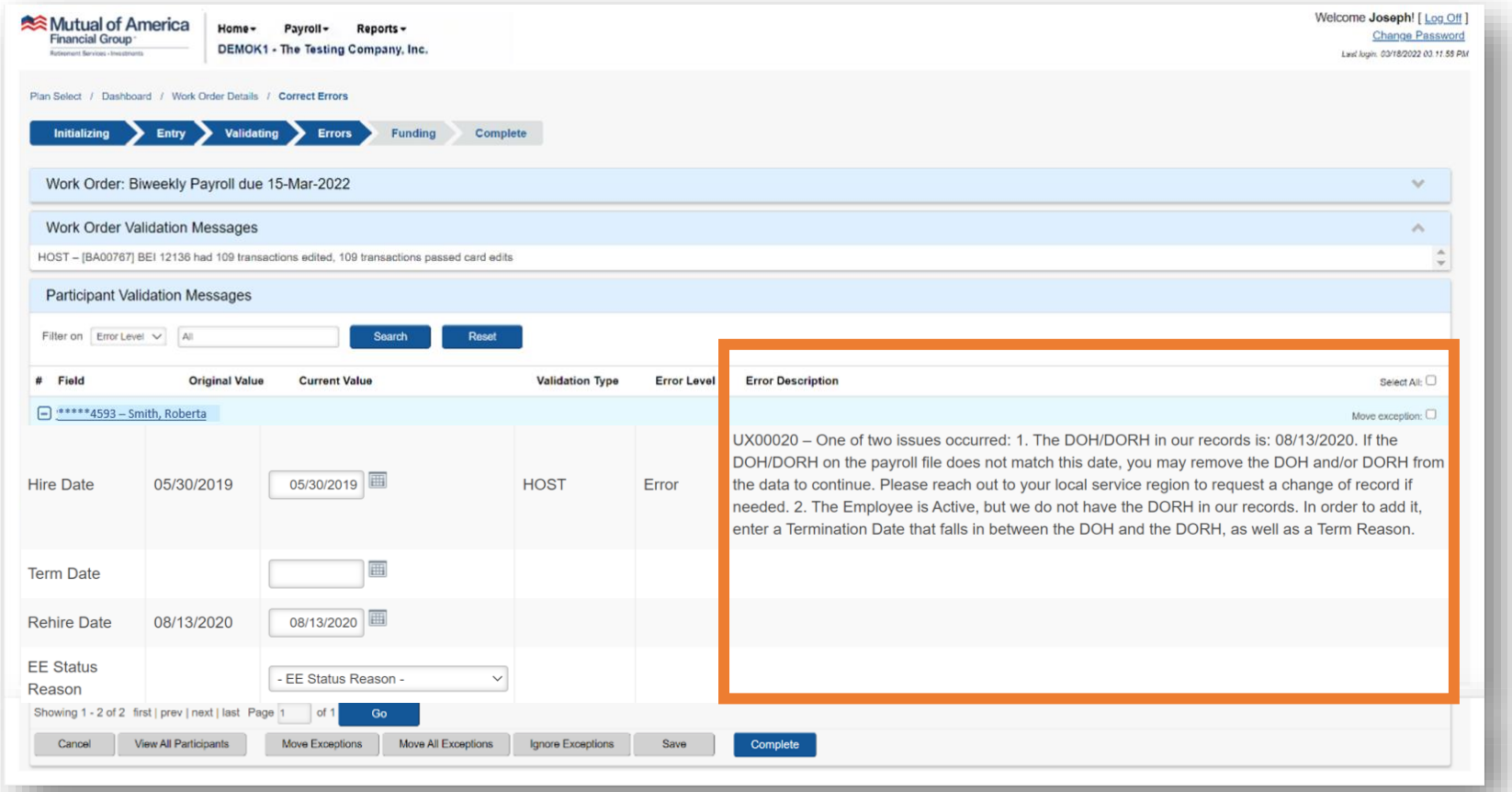
DVW Work Orders

- Scenario #3: Discrepancies are found.
  - In this scenario, the workflow advances to the Errors step.
    - Use the Correct Errors link in the Available Actions menu to review and fix errors.



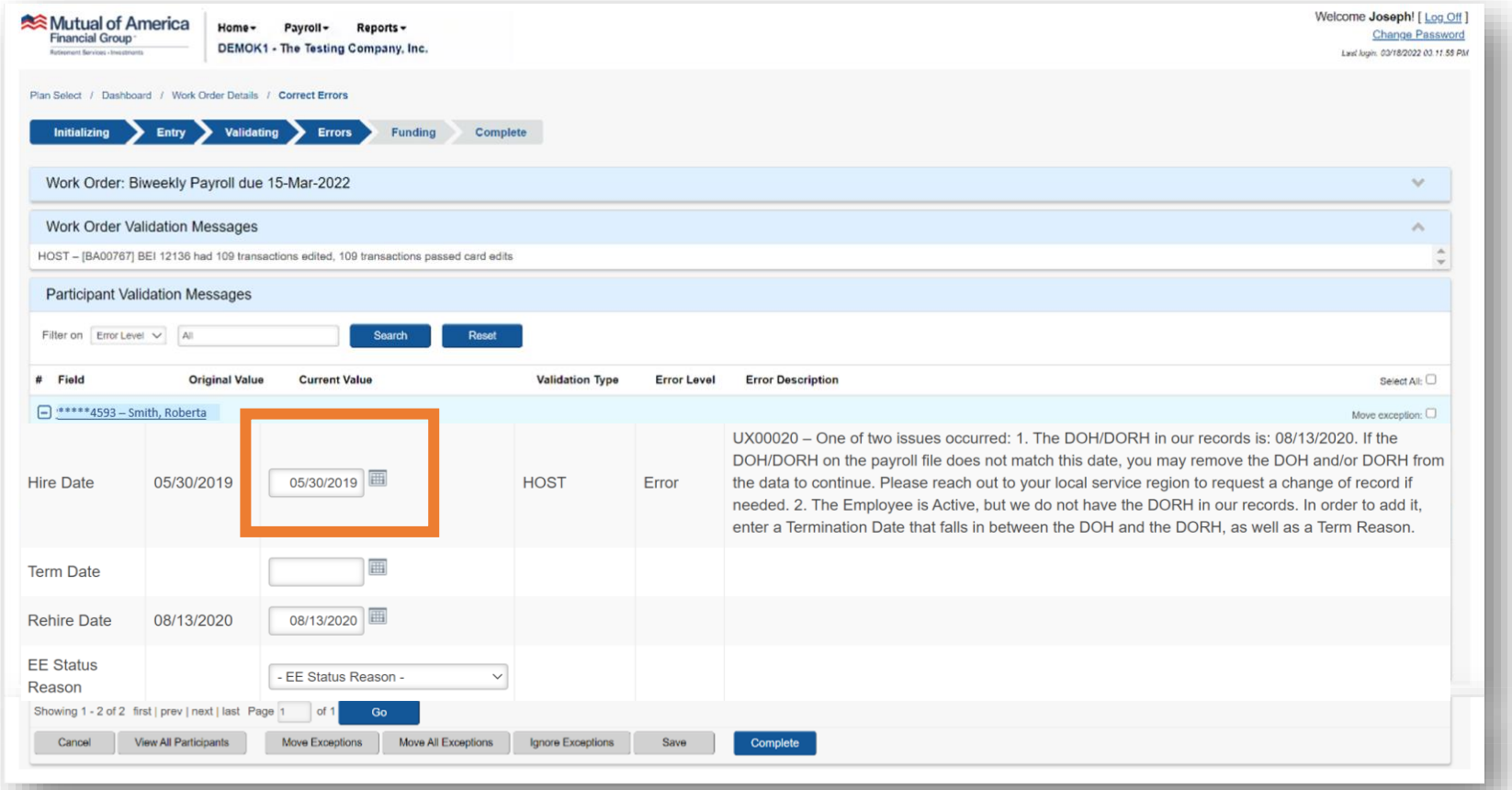
Correcting Validation Errors

- The Correct Errors page is displayed.
- Dates are often referenced in the Error Descriptions field.
  - Date of Birth
  - Date of Hire
  - Date of Rehire
  - Date of Termination



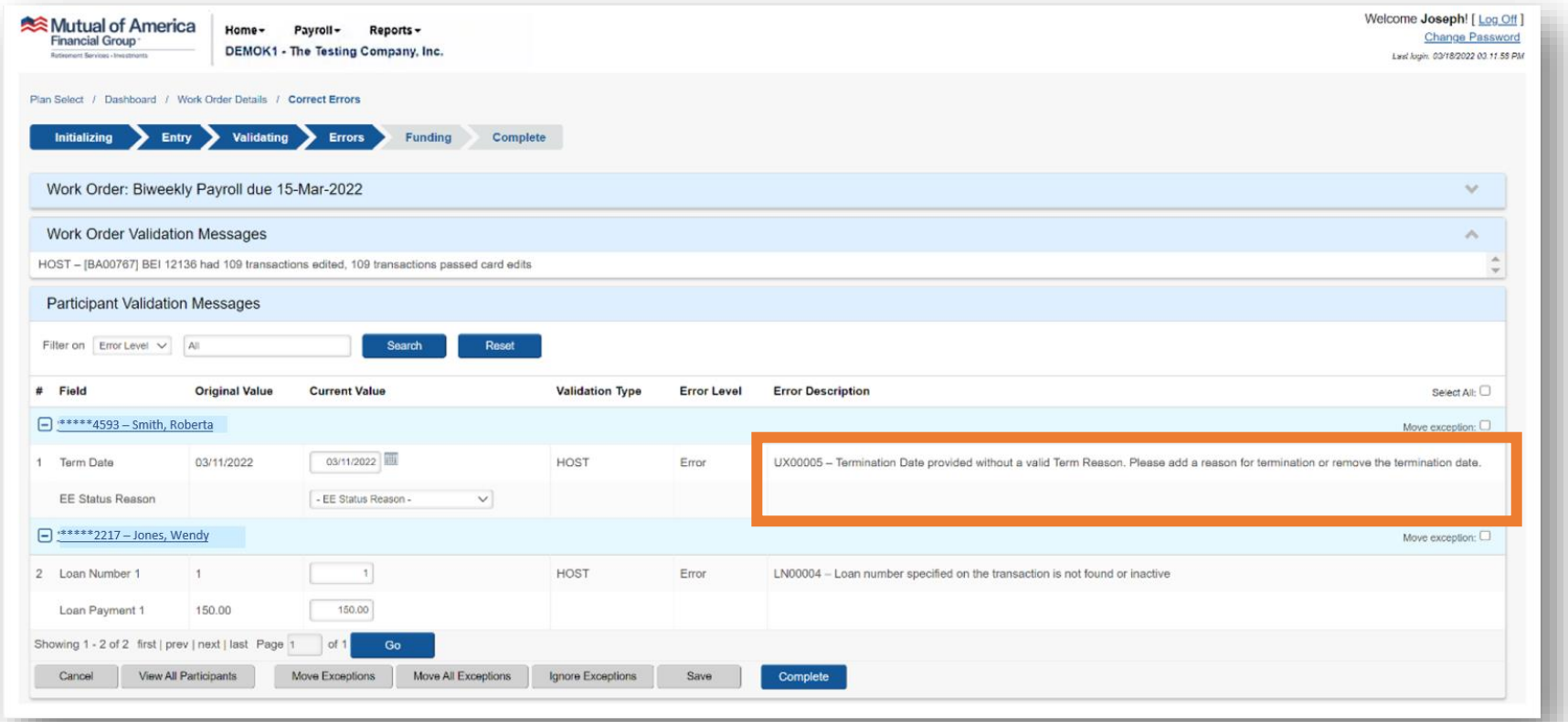
Correcting Validation Errors

- Determine whether the date provided in the Error Description field is correct or incorrect.
  - If the date shown in the Error Description field is correct, enter it into the Current Value text box.
  - If the date is incorrect, notify your CRM, who will have the date corrected in the recordkeeping system.



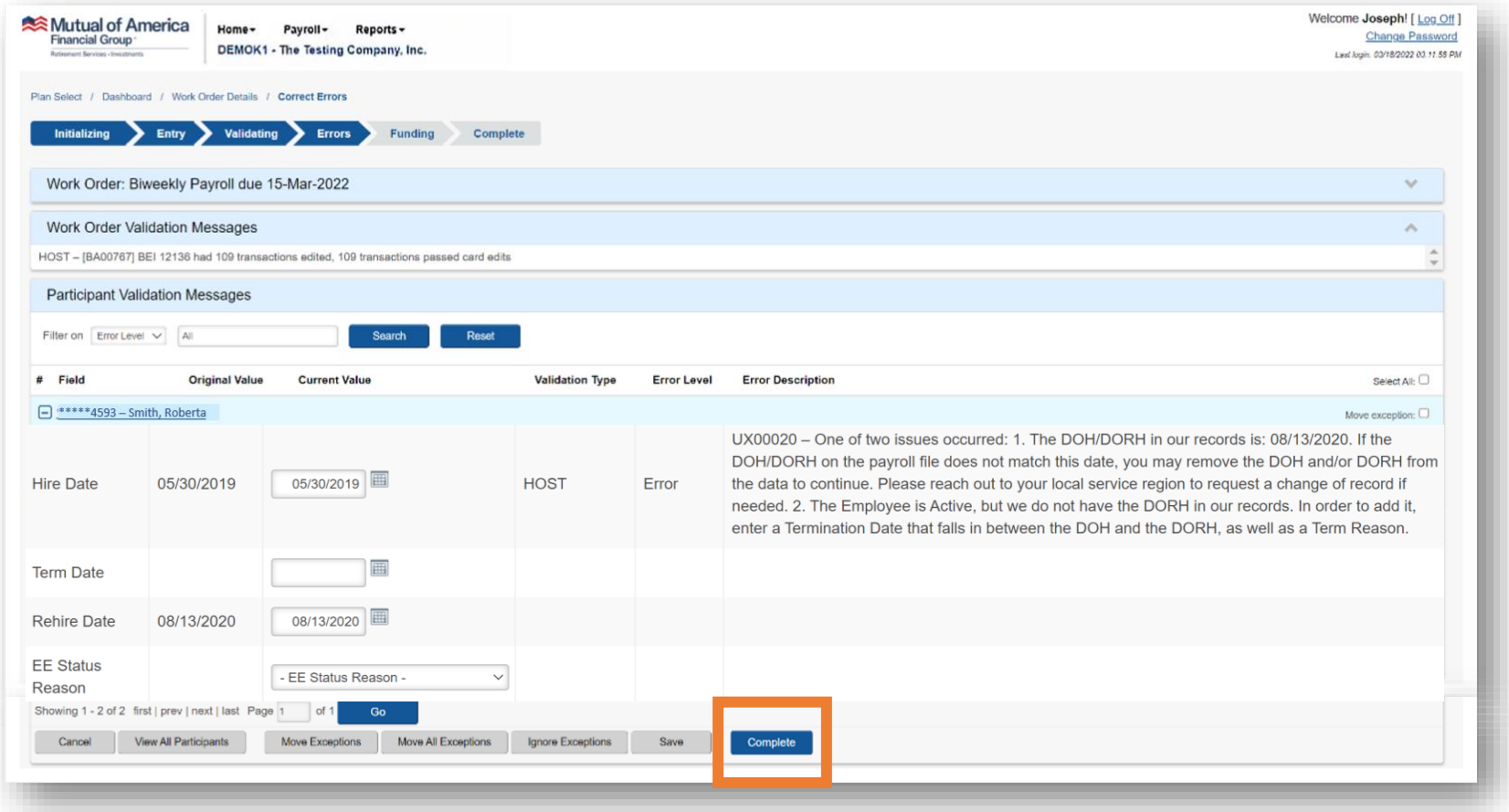
Correcting Validation Errors

- Another type of error happens when data is missing from the Payroll file, such as “Reason for Termination,” which must accompany a Termination Date.



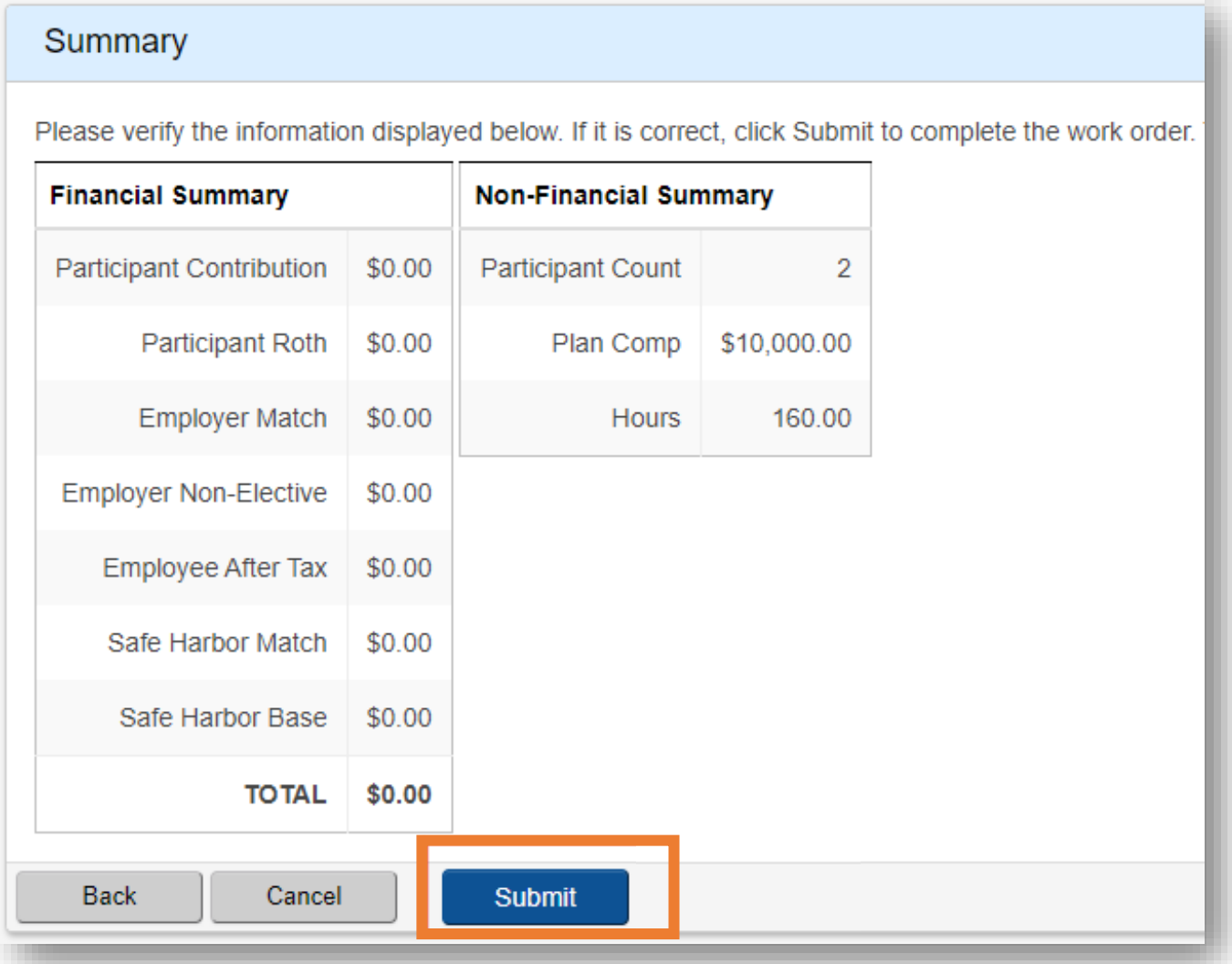
Correcting Validation Errors

- When all errors have been corrected, click the Complete button on the Correct Errors page.



Correcting Validation Errors

- The Summary page, which reflects the totals, will be displayed.
- Click the Submit button.
  - The validation process will continue, and the workflow will advance based on the three scenarios presented earlier.
  - Note, clicking Submit does not indicate the funding was approved. The Work Order must be in a status of “Funding Approval Required” in order to confirm funds.



Next Steps

- We'll meet via Webex.
- You'll participate in a personalized review of the site.
- You'll begin remitting your first work order.
- We'll review additional information regarding site functions.

We'll see you soon! Until then...

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Thank you!

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