

Indicative Data Workorder Process (Manually Populate) For Enrollments, Terminations, Name/Address changes

Log in to the Mutual of America portal at the website www.mutualofamerica.com, select “Login” > “Sponsor Login” > “Access Sponsor Connect”

Once you are logged in, select **Data Validation Web** on the upper left.

When you land on the Data Validation Web page, from the **Payroll** drop down menu on the top of the screen, select **Create New Non-Financial Payroll**. Then complete the items as follows:

Work Order Type Name – Indicative Data

Description – type whatever you want i.e. “New Enrollments” “Terminations” etc.

StartDate – use current date

EndDate – use current date

DueDate – use current date

Frequency – Biweekly or whatever is listed.

Skip any other fields that appear and select **Create**.

Select the **View All Work Orders** link.

When the list appears, you should see your Work Order with a **New** status.

There will be an **Actions** drop down on the right side.

Choose **Begin Entry**, and then enter the information onto the grid. Once completed, select Save, Complete, then Submit.

The Work Order page will go through a status update process.

You should hit the **Refresh** button (lower right) to update the page.

The process will go through some Status steps: **Loading, Awaiting Host Validation, Error Check, Complete**.

Once it shows **Complete** it is done. For enrollments, the Smartplan invitation to enroll email and letter will be send out the next business day or the following business day, depending on what time you approved through the file.

Errors Found

From time to time, you might receive an “**Errors Found**” status. If this happens, the upload process will stop, and you may need assistance. Select **Correct Errors**

For Enrollments: We need SSN, Name, Address, DOB, DOH, DOT and Rehire date (if they were rehired), Email

For Terminations: We need SSN, Name, DOT, Reason for Term.