Reference Guide: Receiving Feedback on Participant Data Files

What you can do

PSW makes it easier for you to implement timely payroll modifications through the use of feedback files from Fidelity. When a participant initiates an entry or adjustment, PSW allows you to retrieve participant feedback information to assist you with the necessary modifications. Here are some events that may trigger feedback from Fidelity:

- Participant enrolls in or changes a deferral election
- Participant initiates a loan, defaults on a loan, or has one payment left on a loan
- Participant changes his or her address
- Participant takes a hardship withdrawal

Important: These events generally require you, as Plan Administrator, to initiate or change a payroll deduction. Failure to act in a timely manner may cause delays in processing.

Prerequisites

Depending upon your plan setup, you may receive participant feedback information in one or both of the following ways:

- Receive Files process
- Standard Reports process

Feedback files are only available online for two weeks. Save any reports you might need to access for longer than two weeks to your local computer or network.

How to use the Receive Files Process

1. On the PSW **Home** page, go to the **Manage Data** tab. Click **Receive Files** under the **File Management** heading.
   - Feedback files will appear in a table that can be sorted by clicking on any of the following column headings:
   - File Name, Description, Date and Time Received, and Expiration Date. All times listed are Eastern Time.
   - All files are viewable by using any application that can read .TXT files.
2. You can either **view a file or download** it (save it to your desktop).

TIP: Files remain in the list for 60 days. New feedback files do not replace old feedback files. Save any files you need to access for longer than 60 days to your local computer or network.

Helpful Hints

PSW provides automatic notifications about the status of key work items and processes.

Related Reference Guide

Managing Your Notification Preferences

Correcting Data Errors

View a file

a. Click **Open**.

b. If you have not already associated this file type with a program, you will be prompted to select a software tool to open the file, such as Excel. Select a program.

c. If applicable, select the checkbox to always use the selected program to open this kind of file.

d. Click **Okay**.

Download a file

a. Click **Save**. A File Download window will pop up.

b. Browse to the destination on your computer where you want to save the file.

c. Assign a file name and file type.

d. Click **Save**.

How to use the Standard Reports Process

1. On the **Reporting** tab, click **View an Existing Report** under the under the individual benefit plan header.
2. If you have more than one plan, select the Plan you want to view from the **Select Plan** dropdown list, and then click **Refresh**.
3. Click the **Feedback Files** folder at the top left.

TIP: Yellow folders currently contain reports. Gray folders are empty.

4. Participant feedback information may be provided in different formats, depending on your plan setup. You can view, print, or save the report to your computer. Click any linked report name to open it.

Printing Tips: Before attempting to print a report, allow sufficient time for it to completely download. Some reports are very large and may take a number of minutes to download. The status bar at the bottom of the report window will indicate when the report has been fully loaded.

To print .CSV and .PDF reports, use the printing features of the selected application to print the reports. For HTML reports, you may have to change the page orientation to landscape using the properties button in the print dialog box.

Additional Information—Definitions

Feedback Type	Definition
Participant Loan Feedback Information	Includes the required information for you to start after-tax payroll deductions on a new loan such as the participant's payment amount, approximate first payment date, payment frequency, and number of payments. This information also shows a participant with one payment left on a loan, including the amount that should be withheld. This is indicated by "last" under the status column.
Participant Deferral Feedback Information	Provides information on new enrollments for plans with online enrollment, as well as deferral changes, including the date when the participant requested the change.
Participant Address Feedback Information	Reflects the details of all participant address updates and how they were initiated, whether it was through your plan administration on PSW or by the participant through a Customer Service representative.
Participant Hardship Withdrawal Feedback Information	After a hardship withdrawal is taken, the feedback information will identify the beginning and end of the six-month suspension period so that appropriate changes can be initiated by you for payroll. Displays any changes to Fidelity's record of status code data over the last 30 days.

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