

Retrieving a Participant Valuation from Sponsor Web by Data Transfer

Sponsor Web is a website designed for plan sponsors that allows you to view participant and plan level information at any time. You can request access to this site for the CalPERS 457 Plan by emailing CalPERS_Plan_Admin@voya.com.

Participant Valuation Reports, with details and summaries of participant activity in the CalPERS 457 Plan, are available to download from Sponsor Web.

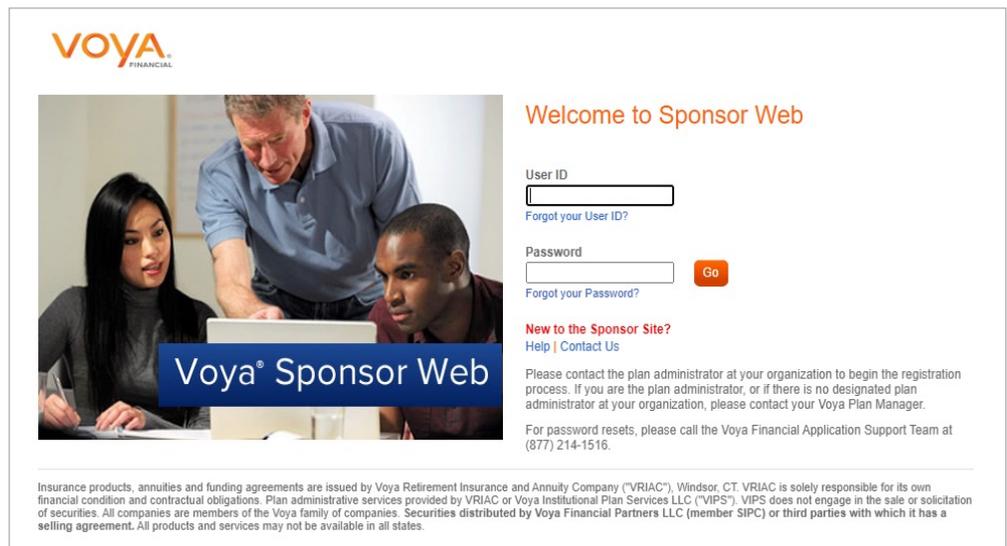
Each month, two reports are generated. One report shows a summary of your Plan information for the previous month. The other report shows full participant details.

At the end of each quarter (March 31, June 30, September 30, and December 31), two additional reports detailing the full quarter are generated (one with Plan-level detail and one with participant-level detail).

Your agency's Participant Valuation Reports are available as CSV files on the Sponsor Web, giving you the following advantages:

- **Flexibility:** You can open a CSV file in a spreadsheet program and sort the data any way you like. It's simple to generate your own accounting, audit and reconciliation reports using a CSV file. This is a big improvement over the PDF file format of the past.
- **Speed:** You will generally have online access to reports on the first day of a new month and a new quarter.
- **Security:** Reports are available exclusively to your agency when you log into Sponsor Web.

1) Visit sponsor.voya.com to log into Sponsor Web.



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Welcome to Sponsor Web

User ID

[Forgot your User ID?](#)

Password

[Forgot your Password?](#)

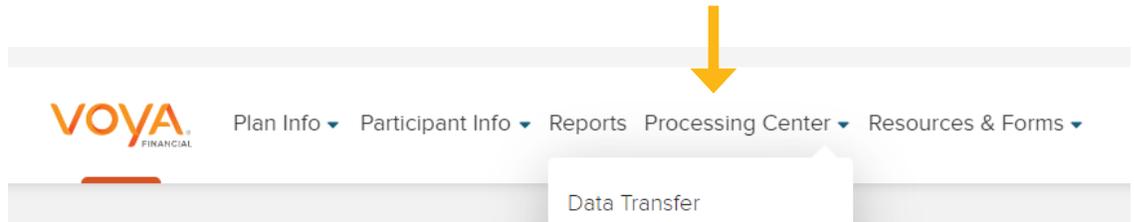
New to the Sponsor Site?
[Help](#) | [Contact Us](#)

Please contact the plan administrator at your organization to begin the registration process. If you are the plan administrator, or if there is no designated plan administrator at your organization, please contact your Voya Plan Manager.

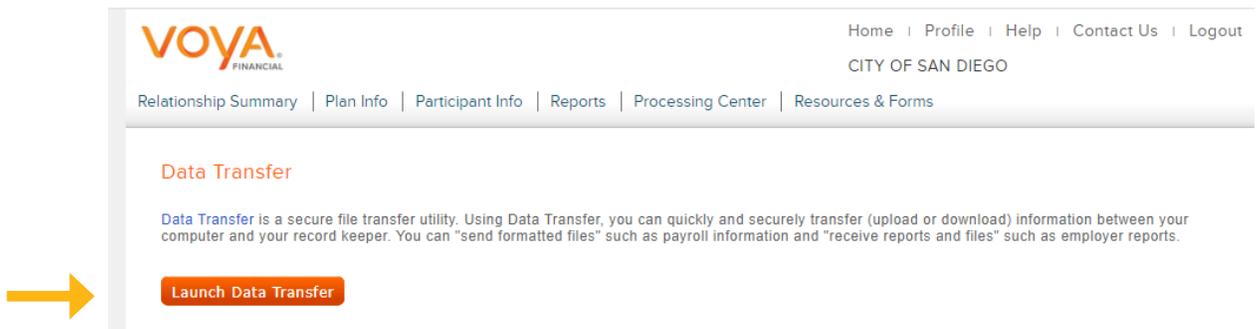
For password resets, please call the Voya Financial Application Support Team at (877) 214-1516.

Insurance products, annuities and funding agreements are issued by Voya Retirement Insurance and Annuity Company ("VRIAC"), Windsor, CT. VRIAC is solely responsible for its own financial condition and contractual obligations. Plan administrative services provided by VRIAC or Voya Institutional Plan Services LLC ("VIPS"). VIPS does not engage in the sale or solicitation of securities. All companies are members of the Voya family of companies. Securities distributed by Voya Financial Partners LLC (member SIPC) or third parties with which it has a selling agreement. All products and services may not be available in all states.

2) Go to the **Relationship Summary** screen, then click **Processing Center > Data Transfer**.



3) On the **Data Transfer** screen, click **Launch Data Transfer**.



4) On the next **Data Transfer** screen, click **Receive Reports & Files**.



5) On the **Receive Reports & Files** screen:

- **File Type** — select *Reports*
- **Activity Period** — defaults to *Current Month* or choose the month for your report
- **File Name** — not required; leave box empty
- **Plan Number** — not required; leave box empty

Click **Search**. You will then receive a message that states “Please wait while your search is executed. Due to the volume of returns, this may take up to 30 seconds.” Click **OK** to continue.

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Receive Reports & Files

Send Formatted Files

Receive Reports & Files

Reports & Files Search

Items marked with a * are required.

* File Type:
Reports

* Activity Period:
Current Month

File Name:
Enter the beginning of the file name or the entire file name
(e.g. enter loan for your loanrpymt or pyrll for your pyrll_dollar_confirm reports)

Plan Number:
Enter the entire Plan Number (6 characters)

Select and/or enter your information above, then click Search

Search

6) From the **Reports & Files Results** list, click the csv files titled *T957_RPT_* and then click **Download**. A file download box will display “Do you want to open or save this file?” Click **Open**.

Reports & Files Results

File to Download:

T957_RPT_452586_20230228_231135.CSV

T957_RPT_452586_20230301_004206.CSV

FEEDBACK_RPT_452586_20230304_001139.TXT

FEEDBACK_RPT_452586_20230310_230903.TXT

FEEDBACK_RPT_452586_20230317_220620.TXT

Select a file above, then click Download

Download