



What: Voya Financial - Participant Retirement Open Banking Migration

When: Thursday, December 7, 2023

Why This is Important:

We want to remind you that the Voya retirement websites will be converted from screen-scraping to the Voya Participant Retirement API on Thursday, December 7. The API is currently available in production, new accounts configured will be routed to use the new API starting on Tuesday, December 5, 2023.

Please note that the original FI List provided on Dec. 4, 2023, was missing a few FIs. We have included an updated complete FI List below.

Voya Financial Institutions (FIs) Moving to Open Banking API:

Legacy FI IDs	Legacy FI Names	New FI ID	New FI Name
See attached FI List		113761	Voya Financial - Participant Retirement

Important Information/Known Issues

Some plans available through the Voya websites are not record-kept at Voya and won't be available with detailed data after the conversion. See attached list of [plans](#) that will not aggregate with holdings and transactions detail following the conversion.

Important Actions to Take:

If Your Organization Has Signed the Financial Institution Data Access (FIDA) Addendum:

It is important that account holders re-authenticate to resume aggregation. Please notify all your users to reauthenticate their credentials to continue aggregating Voya accounts. To assist you, we have provided step-by-step guides for advisors and consumers/clients/investors.

- [For Advisors \(leveraging ByAllAccounts AccountView\)](#)
- [For Consumers/Clients/Investors \(leveraging ByAllAccounts Connect User Interface\)](#)

If Your Organization Has NOT Signed the Financial Institution Data Access (FIDA) Addendum:

Please reach out to [Needa Memon](#) in order to sign the Financial Institution Data Access (FIDA) Addendum. Failure to do so will result in losing access to Voya account aggregation.

Please contact the ByAllAccounts Technical Support Team byallaccounts-support@morningstar.com with any questions regarding this upcoming migration.

The ByAllAccounts Team