

## Guide to HRA Dependent Files

# ADDING & REMOVING DEPENDENTS

IRS Notice 2015-87 requires dependents to be covered under a group health plan to be eligible for a Health Reimbursement Arrangement (HRA). This guide outlines the steps to add and remove dependents. Aptia requires dependents to be enrolled in the group health plan to be HRA-eligible.

During renewal and for eligibility updates throughout the year, the dependent file will need to be provided by the client or service delivery contact. After the plan effective date has passed and the open enrollment file has been processed, an on-demand enrollment report will need to be pulled from the employer online account to review the accuracy of dependent information.

The screenshot shows a 'Report details' form with the following sections:

- File type:** A dropdown menu with 'Excel' selected.
- Time:** A date field with '5/31/2021' entered.
- Plan:** A dropdown menu with 'Plan year' selected.
- Group:** Two dropdown menus, 'Group by' and 'Divisions included'.
- Reporting hierarchy:** A checkbox labeled 'Reporting hierarchy'.
- Type:** A dropdown menu with 'Report detail level' selected and a 'Level 1' button.
- Options:** Four checkboxes: 'Email me when the report is available' (unchecked), 'Include coverage level' (checked), 'Include additional information' (unchecked), and 'Include dependent information' (checked).

### ADDITIONAL DETAILS:

- **Plan Year:** Select the HRA plan year
- **Include Coverage Level:** Select "Yes"
- **Include Dependent Information:** Select "Yes"

If any dependents need to be removed, please notify your Account Executive and allow 2-3 business days for processing. Any dependents that need to be added should be uploaded using the dependent file found on the employer online account. Once this is complete, an on demand enrollment report should be run to ensure that all eligible dependents were successfully linked to the HRA plan. If there are any discrepancies, please notify your Account Executive.

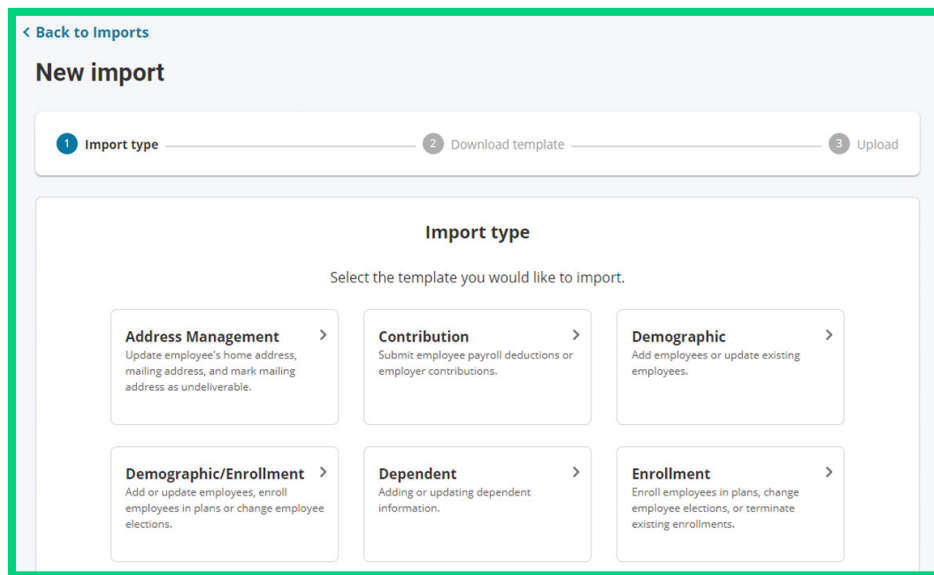
**Please note:** Through the above process, dependents will be added to the HRA. If a dependent needs to be tied to a plan other than the HRA, the update should be completed by the participant.

# Guide to HRA Dependent Files, continued

## Downloading the Dependent File Template

**Step 1:** From the spending and savings account employer online account, select “Import Data.”

**Step 2:** Select “Dependent” from the Data to Import drop-down menu.



**Step 3:** Click “Download Template” and click “Next.”

**Step 4:** Complete the template. Each field is outlined in the Dependent File Template Specifications chart below.

**Step 5:** Once the template has been saved, upload the file and click “Import.”

## Dependent File Template Specifications

Field Name	Dependent Record Description	Format	Maximum Field Length	Valid Value(s)	Required
Employee Identifier	Unique identifier for the participant within the system. Refer to the <a href="#">View Setup Data</a> link on the Import Data From File page in the employer online account to determine the value to use as the Employee ID.	Alphanumeric	15		Y
Dependent Identifier	Unique identifier used to identify dependents when data is supplied through the import file. Note: This ID must be used to identify the dependent for updates.	Alphanumeric	9	Dependent SSN, External Dependent ID	Y
Last Name	Last name of the dependent.	Alphanumeric	30		Y
First Name	First name of the dependent.	Alphanumeric	30		Y
Middle Initial	Middle initial of the dependent.	Alphanumeric	1		N
Date Of Birth	Birth date of the dependent.	Date	8	MM/DD/YYYY	Y
Relationship	The relationship of the dependent to the participant. Only one dependent may have the relationship title of “Spouse.”	Alphanumeric	9	Spouse, Dependent	Y
Relationship Type	If the dependent’s relationship is set to “Dependent,” this field further defines the type of relationship for Medicare Secondary Payer (MSP) Reporting.	Alphanumeric	15	Child, Domestic Partner, Other	N
Gender	Gender of the dependent.	Alphanumeric	1	F, M	N
SSN	Social security number of the dependent. Note: Dashes will automatically be removed if used.	Numeric	9		Y

## Guide to HRA Dependent Files, continued

Field Name	Dependent Record Description	Format	Maximum Field Length	Valid Value(s)	Required
Medicare Beneficiary	Indicates whether or not the dependent is covered by Medicare and should be included in MSP Reporting.	Alphanumeric	1	Y, N	N
Medicare ID	Personal identifier for those covered by Medicare.	Alphanumeric			N
Status	Status of the dependent.	Alphanumeric	8	Active, Inactive	N
Student	Identifies if the dependent is a full-time college student.	Alphanumeric	1	Y, N	N
Issue Card	Indicates issuance of a debit card for the dependent.	Alphanumeric	1	Y, N	N
HRA Enrollment Effective Date	Effective date of the dependent's enrollment in an HRA plan.	Date	8	MM/DD/YYYY	N
HRA Enrollment Termination Date	Termination date of the dependent's enrollment in an HRA plan. Note: Do not use plan year end date.	Date	8	MM/DD/YYYY	N
External Dependent ID	Unique identifier supplied by employer to uniquely identify dependents in their own system.	Alphanumeric	20		N