Importing files through the Chard Snyder Employer Portal

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Getting started with Benefits files

This article provides information about benefits files to import through your employer portal.

Watch this video to learn more.

Files are one way to communicate information about your employees to us. As an alternative to manually keying in the information, files make importing large volumes of data both faster and easier. We offer file templates to upload directly into the employer portal and then take the information from those templates to create and maintain participant accounts.

Common file types

Demographic

- Basic employee demographic information
  - Name, date of birth, social security number (SSN), mailing address, email address, date of hire, and employment status changes
    Note: This information is used to establish the employee in our system. Once the initial demographic information is sent and employees are established in our system, any subsequent demographic files that are sent won't update some of that initial data. This data will need to be updated manually through the employer portal or by employees themselves. This is the default setting in place to protect data integrity and allow participant control with the most up-to-date information. If you send updated data on these fields, you'll receive a warning on the Exception Report stating "The employer's settings are configured to not allow updates to this field(s). Updates via file were ignored." See Understanding the Exception Report for more information.

Ignored fields	**Reason**
Social Security Number (SSN) Date of Hire Gender Status Effective Date Only	These fields are ignored when subsequent demographic files are sent due to data integrity.
Email Address Home Phone Marital Status	These fields are ignored when subsequent demographic files are sent due to participants having access to update their most up-to-date information through their online account.

Note: Participants are unable to update their name or date of birth through their online account. If participants contact us to update their demographic information, we'll ask them to make the update through their employer.

<u>Enrollment</u>

- Employee plan enrollment information
    - Plan name, effective date, and annual election amount
      <u>Note</u>: Like the demographic file, some fields are ignored after the initial file is submitted. If you send updated data on these fields, you'll receive a warning on the Exception Report stating "The employer's settings are configured to not allow updates to this field(s). Updates via file were ignored." See Understanding the Exception Report for more information.

Ignored fields	**Reason**
Reimbursement method Alternate Reimbursement method Enrolled in Claims Exchange Enrollment Effective Date	These fields are ignored when subsequent demographic files are sent due to data integrity.

<u>Contribution</u>

- Employee contribution information
    - Payroll dates, payroll deduction amounts, and employer contributions (if applicable)

<u>Dependent</u>

- Employee dependent information
  <u>Note</u>: This information is required in order for us to reimburse claims for dependent care flexible spending account (dependent care FSA) and health reimbursement arrangement (HRA) plans.

Importing files
To continue setting up your files, see Understanding benefits file processing for more information.

<u>Important</u>: All users will initially be given access to import files. If you would like to restrict this to a smaller group, please reach out to your support team.

Processing files
For more information about processing your files, see Understanding Benefits file processing.

<u>Note</u>: Files may take up to 24 hours to be fully processed.

Understanding the Benefits file import process

This article provides an overview of the process for importing benefits files through the employer portal.

For more information about files, see Getting Started with Benefits Files.

1. Download the templates for the types of files you want to import. See How to download file templates for Benefits plans for instructions.
2. Complete the templates for the types of files you want to import. Click the applicable links for instructions:
   - Completing the demographic file template
   - Completing the enrollment file template
   - Completing the contribution file template
   - Completing the dependent file template
3. Import the completed templates through the employer portal. See How to import files for Benefits plans for instructions.

Processing files
To continue processing your files, see Understanding benefits file processing for more information about tracking your file status, reviewing results as well as troubleshooting and correcting errors.

Note: Files may take up to 24 hours to be fully processed.

How to download file templates for Benefits plans

This article outlines how to download file templates to import directly through the employer portal. To watch a video tutorial, click here.

Important

- After you download your file, you must complete it before you can import it. See Getting Started with Benefits Files for more information.
- Some fields must contain information specific to your plan design. If the data in these fields does not match this information, the file you try to import will fail.

Downloading the template

To download a file template, complete the following steps:

1. Log into the employer portal.

2. Navigate to the Imports tab.

3. Click "+ New import."

4. In the Import type section, select the applicable template.

Scenario	Action
You are importing file templates for the first time.	Select the Demographic template first. Note: When enrolling new employees, the Demographic file you submit must be successfully processed before you can submit the Enrollment file.

5. Click "Download template."

Note: If you previously provided a file template, you can manually open the file instead.

6. Provide data in the Microsoft Excel file.

Note: Complete as many fields as possible to provide adequate information for your employees' accounts.

7. Save a copy of the file so you can easily update and refer back to it as needed.

Scenario	Action
You want to save a copy of the file.	1) Click "File" and select "Save As." 2) Click "Browse" to find the location you want to save the file to. 3) Save the master copy in .xls format to make edits easier.
You want to create a file to import.	1) Click "File" and select "Save As." 2) Click "Browse" to find the location you want to save the file to. 3) Type a name for the import file and save it in .csv or .xls format.

Completing the template
To complete the template for the file you want to import, click the applicable link for instructions:

Completing the demographic file template
Completing the enrollment file template
Completing the contribution file template
Completing the dependent file template

Importing the template
To import the completed template into the employer portal, How to import files for Benefits plans for instructions.

Completing the demographic file template

This article outlines how to complete the demographic file template available to download in the employer portal. Watch this video to learn more.

Important

- You must download the file template before you can complete it. See How to download file templates for Benefits plans for instructions. Download a sample demographic file template.
- Format all dates as MM/DD/YYYY or MMDDYYYY.
- Ensure leading zeros don't get removed from dates and numbers.

Scenario	Action
You select a social security number or date that begins with a zero. When you view the field above the column headings, the zero disappears.	Type an apostrophe (') in front of the number for the template to treat it as text. Alternate option 1) Open a blank Notepad from your computer. 2) Copy and paste the data from the template into Notepad. 3) Delete the data from the template and highlight the entire column (e.g., column A) by clicking on the letter at the top. 4) Right click and select "Format Cells." 5) Select "Text" under the Number tab and click "OK." 6) Copy and paste the data from Notepad back into the template.

- Save completed templates in .xlsx format (recommended).

Complete your file template using the following guidelines.

Column	Required	Action
A: Employee Identifier	Yes	Format the participant’s social security number or employee number without dashes. Important: This field must be the same on each template type submitted (e.g., the Enrollment file template). You can find the identifier used by your company, by going to the Imports tab, clicking on “+ New Import”, then choose any template. Click next, then click on “View file setup requirements”.
B: Last Name	Yes	Provide the participant's last name.
C: First Name	Yes	Provide the participant's first name.
D: Date of Birth	Yes	Provide the participant's date of birth.
E: Address Line 1	Yes	Provide the participant’s address. Note: Don’t use a PO Box if the participant is enrolled in a health savings account (HSA).
F: Address Line 2	No	Leave this field blank.
G: City	Yes	Provide the participant's city.
H: State	Yes	Provide the abbreviation for the state where the participant resides.
I: Zip Code	Yes	Provide the zip code for the area where the participant resides. • Five digits • Nine digits (with or without hyphen)
J: Country	No	Leave this field blank for U.S. addresses.
K: Username	No	Leave this field blank.
L: Password	No	Leave this field blank.

<table>
<tr><td>M: Email Address</td><td>No</td><td>Provide the participant’s email address.

<u>Note</u>: If you don’t include the participant’s email address, the participant will have to contact us to set up their online account.</td></tr>
<tr><td>N: Home Phone</td><td>No</td><td>Format the number without dashes.</td></tr>
<tr><td>O: Employee Number</td><td>Yes</td><td>Leave this field blank. An Employee Number will be automatically generated.

(Clients who were previously with Nyhart, provide the unique number or alphanumeric combination your company has assigned to the participant. Because this number is displayed on various reports, we recommend not using the participant’s social security number.)</td></tr>
<tr><td>P: Employer Employee ID</td><td>Conditional</td><td>Provide the unique number or alphanumeric combination that your company has assigned to the participant.</td></tr>
<tr><td>Q: SSN</td><td>Yes</td><td>Format the nine-digit number without dashes.</td></tr>
<tr><td>R: Division</td><td>Conditional</td><td>If your company has divisions, provide the name of the division the participant belongs to exactly as it appears in our system.

To view the division name in in the employer portal, complete the following steps:
1. Navigate to the Imports tab.
2. Click "+ New import."
3. In the Import type section, select the Demographic template.
4. Click "Next."
5. Click "View file setup requirements."
6. Click "View divisions."</td></tr>
<tr><td>S: Class</td><td>No</td><td>Leave this field blank.</td></tr>
</table>

T: Payroll	Conditional	Notes • This field is required if multiple payroll frequencies are set up in our system. • This field isn't required if no payroll frequencies are set up in our system. Example: You only offer a health savings account (HSA) or commuter benefits. To view the payroll frequencies, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Imports tab. 3) Click "+ New import." 4) In the Import type section, select the Demographic template. 5) Click "Next." 6) Click "View file setup requirements." 7) Click "View payroll frequencies."
U: Payroll Effective Date	Yes	Provide the participant's most recent hire date. Notes • If there are multiple payroll frequencies and the participant is changing frequencies, provide the date of the change. • This field isn't required if no payroll frequencies are set up in our system. Example: You only offer a health savings account (HSA) or commuter benefits.
V: Employment Status	Conditional	Note: This field is required if the participant's status needs to be updated. • Active (default) • LOA • Terminated

W: Status Effective Date	Yes	Provide the date the participant's current employment status went into effect. • Active: Use the participant's original hire date or most recent hire date. • LOA: Use the date the participant started his or her leave of absence. • Terminated: Use the date the participant should no longer incur services upon termination (day following benefits end date).
X: Hire Date	Yes	Provide the participant's original hire date.
Y: Medicare Beneficiary	No	Leave this field blank.
Z: Medicare ID	No	Leave this field blank.

Next steps
Once you complete the template, see How to import files for Benefits plans for instructions.

Completing the enrollment file template

This article outlines how to complete the enrollment file template available to download through the employer portal. Watch this video to learn more.

Important

- You must download the file template before you can complete it. See How to download file templates for Benefits plans for instructions. Download a sample enrollment file template.
- Format all dates as MM/DD/YYYY or MMDDYYYY.
- Format all dollar amounts with two decimal places and without dollar signs or commas (e.g., XXXX.XX).
- Ensure leading zeros don't get removed from dates and numbers.

Scenario	Action
You select a social security number or date that begins with a zero. When you view the field above the column headings, the zero disappears.	Type an apostrophe (') in front of the number for the template to treat it as text. Alternate option 1) Open a blank Notepad from your computer. 2) Copy and paste the data from the template into Notepad. 3) Delete the data from the template and highlight the entire column (e.g., column A) by clicking on the the letter at the top. 4) Right click and select "Format Cells." 5) Select "Text" under the Number tab and click "OK." 6) Copy and paste the data from Notepad back into the template.

- Save completed templates in .xlsx format (recommended).

Complete your file template using the following guidelines.

Column	**Required**	**Action**
A: Employee Identifier	Yes	Format the participant's social security number or employee number without dashes. Important: This field must be the same on each template type submitted (e.g., the Demographic template). You can find the identifier used by your company, by going to the Imports tab, clicking on "+ New Import", then choose any template. Click next, then click on "View file setup requirements".

B: Election Amount	Yes	Provide the participant's election amount.
		Notes
		• This field is required for a flexible spending account (FSA) or commuter benefits plan only.
		  ○ FSA: Annual election
		  ○ Commuter benefits: Monthly election
		• Don't include an amount for a health savings account (HSA) or health reimbursement arrangement (HRA).

C: Plan Name	Yes	Provide the participant's plan name exactly as it appears in our system. To view the plan name in the employer portal, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Imports tab. 3) Click "+ New import." 4) In the Import type section, select the Enrollment template. 5) Click "Next." 6) Click "View file setup requirements." 7) Click "View plans." Note: If a participant is enrolled in multiple plans, use a separate row for each one.
D: Enrollment Effective Date	Yes	Provide the participant's enrollment date.

E: Employer Contribution	Conditional	Provide the amount your company is contributing to the plan, if applicable. Note: Do not include an amount for a health savings account (HSA).
F: Enrollment Term Date	Conditional	Provide the date the participant is dropping the plan due to a qualifying life event in the middle of the plan year. Note: Do not use this field to correct a mistaken enrollment, report a termination of employment, or indicate the plan year end date.
G: Primary Reimbursement	No	Leave this field blank.
H: Election Amount Indicator	Conditional	Note: This field is required for a health savings account (HSA) or commuter benefits plan only. • HSA: PerPay • Commuter benefits: PerMonth
I: HDHP Coverage Level	Conditional	Note: This field is required for a health savings account (HSA) or health reimbursement arrangement (HRA) only. • Single • Family
J: Enrolled in Claims Exchange	No	Leave this field blank.
K: HSA Terms Flag	No	Leave this field blank.

Scenario	Action
You have employer contributions to add to a medical/limited medical/combination medical FSA.	Include the contribution amount within the Employer Contribution field on the initial enrollment file for fund availability.
You have employer contributions to add to a dependent care FSA.	Include the contribution amount and contribution description on the contribution file. See Completing the contribution file template for more information.

Next steps
Once you complete the template, see How to import files for Benefits plans for instructions.

Completing the contribution file template

This article outlines how to complete the contribution file template available to download through the employer portal. A contribution file should **not** be imported if you are set up to have recurring contributions based on your payroll schedule. Watch this video to learn more.

Important

- You must download the file template before you can complete it. See How to download file templates for Benefits plans for more information. Download a sample contribution file template.
- Format all dates as MM/DD/YYYY or MMDDYYYY.
- Format all dollar amounts with two decimal places and without dollar signs or commas (e.g., XXXX.XX).
- Ensure leading zeros don't get removed from dates and numbers.

Scenario	Action
You select a social security number or date that begins with a zero. When you view the field above the column headings, the zero disappears.	Type an apostrophe (‘) in front of the number for the template to treat it as text. Alternate option 1) Open a blank Notepad from your computer. 2) Copy and paste the data from the template into Notepad. 3) Delete the data from the template and highlight the entire column (e.g., column A) by clicking on the letter at the top. 4) Right-click and select "Format Cells." 5) Select "Text" under the Number tab and click "OK." 6) Copy and paste the data from Notepad back into the template.

- Save completed templates in .xlsx format (recommended).

Complete your file template using the following guidelines:

Column	**Required**	**Action**
A: Employee Identifier	Yes	Format the participant's social security number or employee number without dashes. Important: This field must be the same on each template type submitted (e.g., the Demographic and Enrollment file templates). You can find the identifier used by your company, by going to the Imports tab, clicking on "+ New Import", then choose any template. Click next, then click on "View file setup requirements".
B: Contribution Date	Yes	Provide the contribution date. For scheduled plans, the date provided must match a payroll deduction date or an employer contribution date in the system. For plans with no schedule, the date must fall within the plan year.
C: Contribution Description	Yes	Indicate the type of contribution. • Payroll (for participant payroll deduction) • Employer (for employer contribution) Note: If a participant has both types, use a separate row for each one.
D: Contribution Amount	Yes	Provide the contribution amount. Note: A negative value isn't allowed for a health savings account (HSA).

E: Plan Name	Yes	Provide the participant's plan name exactly as it appears in our system. To view the plan name, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Imports tab. 3) Click "+ New import." 4) In the Import type section, select the Contribution template. 5) Click "Next." 6) Click "View file setup requirements." 7) Click "View plans."
F: Prior Tax Year	No	Leave this field blank unless you want to submit health savings account (HSA) contributions for a previous tax year. <u>Note</u>: This field applies to HSAs only.

Scenario	**Action**
You have employer contributions to add to a dependent care FSA.	Include the contribution amount and contribution description on the contribution file.
You have employer contributions to add to a medical/limited medical/combination medical FSA.	Include the contribution amount within the Employer Contribution field on the initial enrollment file for fund availability. Employer contributions are made one time on an enrollment level, and do not need to be communicated.

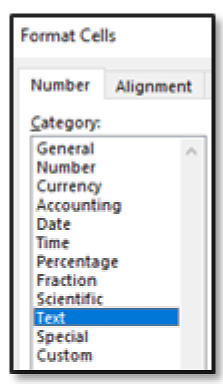
Next steps
Once you complete the template, see How to import files for Benefits plans for instructions.

Completing the dependent file template

This article outlines how to complete the dependent file template available to download through the employer portal.

Important

- You must download the file template before you can complete it. See How to download file templates for Benefits plans for instructions. Download a sample dependent file template.
- Format all dates as MM/DD/YYYY or MMDDYYYY.
- Ensure leading zeros don't get removed from dates and numbers.

Scenario	Action
You select a social security number or date that begins with zero. When you view the field above the column headings, the zeros disappear.  	Type an apostrophe (‘) in front of the number for the template to treat it as text. Alternate option 1) Open a blank Notepad from your computer. 2) Copy and paste the data from the template into Notepad. 3) Delete the data from the template and highlight the entire column (e.g., column A) by clicking on the letter at the top. 4) Right-click and select "Format Cells." 5) Select "Text" under the Number tab and click “OK.”  6) Copy and paste the data from Notepad back into the template.

- Saved completed templates in .XLSX format (recommended).

Complete your file template using the following guidelines.

Column	**Required**	**Action**
A: Employee Identifier	Yes	Format the participant's social security number or employee number without dashes. Important: This field must be the same on each template type submitted (e.g., the demographic file template). You can find the identifier used by your company, by going to the Imports tab, clicking on "+ New Import", then choose any template. Click next, then click on "View file setup requirements".
B: Dependent Identifier	Yes	Provide the dependent's or spouse's social security number without dashes. Important: If the social security number is unknown, don't include the dependent or spouse on the file.
C: Last Name	Yes	Provide the dependent's or spouse's last name.
D: First Name	Yes	Provide the dependent's or spouse's first name.
E: Middle Initial	No	Leave this field blank.
F: Date of Birth	Yes	Provide the dependent's or spouse's date of birth.
G: Relationship	Yes	Indicate the individual's relationship to the participant. • Dependent • Spouse
H: Relationship Type	No	Leave this field blank.
I: Gender	No	Leave this field blank.
J: SSN	Yes	Provide the dependent's or spouse's social security number without dashes.
K: Medicare Beneficiary	No	Leave this field blank.
L: Medicare ID	No	Leave this field blank.
M: Status	No	Leave this field blank.

N: Student	No	Leave this field blank.
O: Issue Card	No	Leave this field blank.
P: HRA Enrollment Effective Date	Conditional	Provide the participant's enrollment date. Note: This field is required for HRA plans only.
Q: HRA Enrollment Termination Date	Conditional	Provide the participant's termination date. Note: This field is required for HRA plans only.
R: External Dependent ID	No	Leave this field blank.

Next steps
Once you complete the template, see How to import files for Benefits plans for instructions.

How to import files for Benefits plans

This article outlines how to import Benefits files directly into the employer portal to enroll participants and submit contribution information. To watch a video tutorial, click here.

If you offer a flexible spending account (FSA), health savings account (HSA), health reimbursement arrangement (HRA), or commuter benefits plan, you can import files directly into the employer portal.

Important

- Before you can import a file, you must first download and complete a template for the applicable file type. See Getting Started with Benefits Files for more information.
- If you're importing a file template for the first time, start with the Demographic template.
- Some fields must contain information specific to your plan design. If the data in these fields doesn't match this information, the file you try to import will fail.
- You must include an email address on the demographic file to ensure participants can access their Benefits plans.

Scenario	Cause	Resolution
A participant doesn't receive an enrollment confirmation email or one-time password.	The participant's email address wasn't included on the Demographic file.	The participant must contact us to set up his or her account.

Importing files

To import Benefits files in the employer portal, complete the following steps:

1. Log into the employer portal.

2. Navigate to the Imports tab.

3. Click "+ New import."

4. In the Import type section, select the Demographic template.

5. Click "Next."

6. In the Upload Demographic file section, drag and drop the file or click "browse" and locate the .csv, .xls, or .xlsx file saved on your computer.

   Important: If you create a .csv file for import, don't open the file again. Re-opening a .csv file changes formatting in the document. If you open a .csv file, save a new copy of the file to import.

7. Click "Show advanced settings" and make sure the Synchronize box isn't checked.

8. Click "Import."

Note: A notification is displayed when your file has been successfully submitted, and you’re automatically redirected to the Imports tab.

9. Verify the Demographic file imported successfully without errors before you import the Enrollment file.

10. Repeat steps 4-9 to import the Enrollment file.

11. Repeat steps 4-9 to import the Contribution file (if applicable).

Note: Allow up to 24 hours for files to process. After you submit your files, you can check their status in the employer portal. See How to track the status of imported Benefits files for instructions.

Understanding Benefits file processing

This article provides an overview of benefits file processing.

Status tracking
Once your file has imported successfully, you can track its progress. See How to track the status of imported Benefits files for instructions.

Note: Files may take up to 24 hours to be fully processed.

Reviewing results
Once the file has finished processing, you're able to view the results within the employer portal. See How to view reporting related to Benefits file errors for instructions.

Troubleshooting errors
Click the applicable link for instructions on troubleshooting some of the most common errors that can occur during processing:

- Troubleshooting demographic file import errors
- Troubleshooting enrollment file errors
- Troubleshooting contribution file import errors

Correcting errors

Scenario	Resolution
You want to correct the file errors directly in the employer portal.	See How to correct and resubmit Benefits files for instructions.
You want to correct the file errors on the file and then re-import it into the employer portal.	See How to import files for Benefits plans for instructions.

Additional resources

- Getting Started with Benefits Files
- Understanding the benefits file import process

How to track the status of imported Benefits files

This article outlines how to check the status of Benefits files imported through the employer portal.

To track the status of your files in the employer portal, complete the following steps:

1. Log into the employer portal.
2. Navigate to the Imports tab.
    - Pending: Files were recently imported but haven't yet been processed.
    - Processing: Files are currently processing.
      Note: Results for these files should be available shortly.
    - Completed: Files have been successfully processed or were canceled due to issues with the files.

Scenario	**Action**
A file shows a Completed status.	Select the file's entry in the list to expand its details. Compare the total number of records on the file to the number of added, updated, pending, and/or errored records to ensure the entire file was processed.
The Errored column indicates no records failed, but the Added, Updated, and/or Pending columns don't add up to the total number of records on the file.	You must re-import the file. For any records with one or more errors, click "Review." Then click the applicable link to download the report and view the details of the error(s). See How to view reporting related to Benefits file errors for instructions.

How to view reporting related to Benefits file errors

This article outlines how to view reporting in the employer portal in order to identify Benefits file errors. Watch this video to learn more.

Benefits file notifications, including the Import Status-Consumer Data Exchange emails, are automatically sent to contacts with the File Contact role whenever a file has entered the import queue. These emails provide the file status, summarize file details and indicate how many records, if any, failed. Contacts are prompted to view the error reports available and take action, if needed. If you would like to receive these notifications, please reach out to your support team.

To view this reporting in the employer portal, complete the following steps:

1. Navigate to the Imports tab.
2. Select a file within the Completed section that indicates, "Completed with errors."
3. Click "Review" to view the errors.
4. Click "Download exception report."
   Note: The report is only generated if it includes errors or warnings. Each tab in the report contains results for different report types. The most common reports are arranged on the following tabs:
   - Demographic report – Sheet 1
   - Enrollment report – Sheet 2
   - Contribution report – Sheet 3
     Note: Contributions for health savings accounts (HSAs) aren't included here.

5. For information about HSA contributions, click "Download open ended HSA imported contribution report" to view the report.

   Note: The report is only generated if it includes HSA contribution records. The information in the report is arranged on the following tabs:
   - Summary of contributions – Sheet 1
   - Successfully processed contributions – Sheet 2
   - Contribution errors and warnings – Sheet 3

6. For information about non-HSA contributions, click "Download contribution discrepancy report" to view the report.

   Note: The report is only generated if it includes flexible spending account (FSA), health reimbursement arrangement (HRA), or commuter benefits plan contribution records. The information in the report is arranged on the following tabs:
   - Summary of contributions – Sheet 1
   - Successfully processed contributions – Sheet 2
   - Contribution discrepancies – Sheet 3
   - Contributions not received – Sheet 4
   - Contribution errors and warnings – Sheet 5

7. For instructions on how to correct a file, see How to correct and resubmit Benefits files.

Troubleshooting errors

Click the applicable link for information about troubleshooting some of the most common errors that can occur during processing:

Troubleshooting demographic file import errors
Troubleshooting enrollment file errors
Troubleshooting contribution file import errors

Understanding the Exception Report

This article explains the Exception Report that generates if there were any errors or warnings when an imported file was processed.

The Exception Report generates in Excel format and provides details about the errors and warnings that occurred when the file was processed. There are multiple tabs across the bottom of the report for the various record types. If one of the record types wasn't included on the file or if the record type was included but there were no issues, that worksheet will be blank.

Common record types:

- Demographic
- Enrollment
- Contribution
  Important: This report doesn't include information about Health Savings Account (HSA) contributions.

Note: To access this report in the employer portal, see How to view reporting related to Benefits file errors for instructions.

Heading descriptions

Heading	Description
Severity	Indicates how serious an issue is and if further action is needed. Severity types: • Errors 　○ All errors appear at the top of the report because they're the most serious issues. 　○ Errors on the file indicate the records weren't uploaded. 　○ Errors must be reviewed and corrected either by submitting a new file or updating the records manually in the employer portal. • Warnings 　○ Warnings aren't errors but rather notifications that information on the file conflicts with information already in the system. 　○ Warnings should be reviewed but may not require further action. • Information 　○ Information should be reviewed but may not require further action. 　Example: Usernames and passwords are typically ignored, depending on your specific account settings.

Row Number	Identifies the row in the actual file that was processed. <u>Note</u>: This information is helpful for locating a record if you're reviewing the file to troubleshoot an issue.
Employee Identifier, First Name, Last Name	Provides identifying information to locate a participant.
Field Name	Provides the name of the field on the actual file where an issue occurred.
Error	Provides a brief description of the issue, which should help to understand what needs to be corrected on the file.
Error Data	Provides the information included on the actual file that caused the issue to occur.

How to correct and resubmit Benefits files

This article outlines how to correct and resubmit a Benefits file directly through the employer portal. Watch this video to learn more.

Notes

- You can either correct the errors directly in the employer portal or correct the errors and then re-import the file. See How to import files for Benefits plans for instructions.
- Not all file errors are able to be resolved within the employer portal.
- The process of re-importing corrected files in the employer portal removes the reporting for the initially uploaded file. You'll only have access to reporting for the most recent file you submitted.

Scenario	**Action**
You want to correct and re-import files. Note: This is the recommended option.	1) Log into the employer portal. 2) Navigate to the Imports tab. 3) In the Completed section, select a report that indicates "Completed with errors." 4) Click "Review." 5) In the Actions section, click "Review & fix" to the view errors within the report. 6) Open the previously submitted file saved to your computer. 7) Make any necessary corrections based on the errors within the report. 8) Resubmit the file. See How to import files for Benefits plans for instructions.

You want to correct and resubmit a file. Note: With this option, you won't be able to see previously submitted information.	1) Log into the employer portal. 2) Navigate to the Imports tab. 3) In the Completed section, select a report that indicates "Completed with errors." 4) Click "Review." 5) In the Actions section, click "Review & fix" to the view errors within the report. 6) Click each error to review the details. 7) Click "Fix all." 8) Provide updated information for each field with an error. 9) Click "Queue record" to submit a correction. • If the correction was successful, a green dot is visible next to the record. • If the correction was unsuccessful, attempt the correction again. If you're still unable to make the correction, contact us for assistance. 10) Once you've corrected all errors, click "Resubmit file." 11) Return to the Imports tab to make sure all records on the file were successfully imported.

Troubleshooting demographic file import errors

This article explains how to troubleshoot errors for demographic files when you import them through the employer portal.

If errors occur when you import a demographic file, there are steps you can take to determine what caused the errors and how to resolve them before you import the file again.

Important

- After you troubleshoot the file errors outlined in the action steps below, see How to correct and resubmit Benefits files for instructions.
- You must first successfully import this file before you can import the enrollment file.

Within the Exception Report, review all items with a severity of "Error" on the Sheet1 tab of the spreadsheet.

Note: Error data refers to the information in the corresponding Field Name on the file or value housed in the employer portal.

Click the applicable field name for a file error to learn why the error occurred and how to resolve it:

EmployeeIdentifier
MiddleInitial
Gender
MaritalStatus
DateOfBirth
AddressLine1
EmailAddress
HomePhone
EmployeeNumber
Division
Payroll
PayrollEffectiveDate
StatusEffectiveDate
HireDate

EmployeeIdentifier field

Error message	Explanation	Action
EmployeeIdentifier does not match key field SSN.	The social security number (SSN) in this field does not match the one listed in the SSN field.	Ensure the EmployeeIdentifier and SSN fields contain the same number.

MiddleInitial field

Error message	Explanation	Action
MiddleInitial cannot be greater than one character. MiddleInitial cannot contain special characters, except a single quote (') or a dash (-).	This field can only contain one character.	Ensure only one character is in this field.

Gender field

Error message	Explanation	Action
The value {inputValue} is not valid for the field Gender.	Only M (for male) and F (for female) are valid characters for this field.	Ensure only M or F is in this field.

MaritalStatus field

Error message	Explanation	Action
The value {inputValue} is not valid for the field MaritalStatus.	Only M (for married) and S (for single) are valid characters for this field.	Ensure only M or S is in this field.

DateOfBirth field

Error message	Explanation	Action
DateOfBirth must precede HireDate.	The participant's date of birth (DOB) must be prior to the hire date.	Verify the participant's DOB and hire date are correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Employees tab. 3) Search for and select the participant. 4) Click "View profile." 5) Review the participant's DOB on the Personal tab, and his or her hire date on the Employment tab. Note: If you update the DOB and/or hire date, click "Save changes" after each change you make.

AddressLine1 field

Error message	Explanation	Action
Cannot be a P.O. Box.	This error can occur when a physical address is not used in this field, and there is also a health savings account (HSA) enrollment record on the file.	Update this field to the physical address. Note: The participant can then manually add a mailing address in his or her online account.

EmailAddress field

Error message	Explanation	Action
The email address specified is not valid.	The email address is invalid. Scenarios: • Spaces • No @ • No .com	Verify and update the participant's email address.

HomePhone field

Error message	Explanation	Action
The HomePhone specified is not a valid phone number. Phone number must be 7-10 digits long.	Phone numbers cannot be more than 10 digits or include characters.	Add a number with 7-10 digits and without characters.

EmployeeNumber field

Error message	Explanation	Action
Employee Number is a required field.	This is a unique number or alphanumeric combination. Depending on your setup, it may be automatically generated by the system or it may be a number your company has assigned to the participant. Important: Because the employee number is displayed on various reports, we recommend not using the participant’s social security number (SSN).	Add the employee number.
The Employee Number already exists and is assigned to xxxxxxxxxxx.	The employee number is already assigned to another participant in our system, or the participant’s employee number is listed differently in our system.	Verify the employee number is correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Employees tab. 3) Search for and select the participant. 4) Click "View profile." 5) Review the participant's employer number on the Employment tab. Note: If you update the employee number, click "Save changes."

Division field

Error message	Explanation	Action
The Division specified is not valid for the employer.	The division name on the file does not match a division name in our system.	Verify the division name is correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Imports tab. 3) Click "+ New import." 4) In the Import type section, select the Demographic template. 5) Click "Next." 6) Click "View file setup requirements." 7) Click "View divisions." <u>Note</u>: If you do not have divisions, leave this field blank.

Payroll field

Error message	Explanation	Action
The Pay Frequency specified is not valid for the employer.	The pay frequency on the file does not match the pay frequency in our system.	Verify the pay frequency is correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Imports tab. 3) Click "+ New import." 4) In the Import type section, select the Demographic template. 5) Click "Next." 6) Click "View file setup requirements." 7) Click "View payroll frequencies." <u>Note</u>: If you do not have pay frequencies, leave this field blank.

PayrollEffectiveDate field

Error message	Explanation	Action
A payroll frequency effective date is required when the payroll frequency is updated.	If you are updating the participant's payroll frequency, an effective date must be included to reflect that change.	Add an effective date if the payroll frequency is changing. If the payroll frequency is not changing, leave this field blank.

StatusEffectiveDate field

Error message	Explanation	Action
The StatusEffectiveDate must be greater than or equal to the participant's current Status Effective Date.	The status effective date on the file is different than the most recent status effective date in our system. • If this error occurs with the error below, both the statuses and the effective dates differ. • If this error occurs without the error below, only the effective dates differ. Note: This error prevents other demographic fields from updating.	Contact us for assistance.
StatusEffectiveDate must be greater than current Effective Date.	This error is paired with the error above if both the status and the effective date on the file differ from what we have in our system.	Contact us for assistance.
The StatusEffectiveDate must be on or before the consumer's enrollment effective date.	The status effective date can't be after the enrollment effective date in our system if the participant has not had a status change.	Contact us for assistance.
StatusEffectiveDate may not precede HireDate for Active status.	The status effective date must be on or after the participant's hire date.	Contact us for assistance.

HireDate field

Error message	Explanation	Action
HireDate cannot be in the future.	Employment hire dates cannot be in the future.	Wait to add the participant to the file until the hire date has passed.
Invalid Format – Date must be formatted as {MMDDCCYY}.	The hire date is formatted incorrectly. Note: The hire date is not required; however, our system uses the day after the participant's date of birth as the hire date if this field is left blank.	Add the hire date in the correct format or leave this field blank.
HireDate must precede StatusEffectiveDate for LOA status.	Because the participant has a leave of absence status, the status effective date must be at least one day after the hire date. Note: The status effective date for participants with an active status can be the same as the hire date.	Contact us for assistance.
HireDate is a required field.	This error occurs when the date of birth is missing or this field is formatted incorrectly. The template does not ask for a hire date, and instead takes the date of birth and adds one day.	Add the participant's date of birth to the DateOfBirth field.
Class Effective Date must be greater than or equal to the participant's hire date.	This error can occur due to a missing hire date when the record was created. This can occur for participants who already have an online account profile and the conflicting information won't allow profile updates.	Contact us and confirm the participant's employment history. Note: We may need to update this for you.

Troubleshooting enrollment file errors

This article explains how to troubleshoot errors for enrollment files when you import them through the employer portal.

If errors occur when you import an enrollment file, there are steps you can take to determine what caused the errors and how to resolve them before you import the file again.

Important

- After you troubleshoot the file errors outlined in the action steps below, see How to correct and resubmit Benefits files for instructions.
- You must first successfully import the demographic file before you can import the enrollment file.
- Enrollment data may not be changed for participants with a terminated status.
- Changing an existing enrollment effective date isn't allowed via file import. You'll need to update the enrollment effective date within the employer portal instead.

Within the Exception Report, review all items with a severity of 'Error' on the Sheet2 tab of the spreadsheet.

Note: The error data always refers to the information on the file, not what's in our system.

Click the applicable field name for a file error to learn why the error occurred and how to resolve it:

EmployeeIdentifier
ElectionAmount
PlanName
EnrollmentEffectiveDate
EmployerContribution
EnrollmentTermDate

EmployeeIdentifier field

Error message	Explanation	Action
Participant with Id (xxxxxxxxx) cannot be found.	We don’t have a participant in our system with the same social security number (SSN) or employee number.	Verify the SSN and employee number are correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Employees tab. 3) Search for and select the participant. 4) Click "View profile." 5) Review the participant's SSN on the Personal tab, and his or her employee number on the Employment tab. Note: If you update the SSN and/or employee number, click "Save changes" after each change you make.

ElectionAmount field

Error message	Explanation	Action
ElectionAmount (xxx.xx) is less than posted or confirmed deductions to date (xxx.xx).	The election amount can't be less than the total payroll deductions already posted to the participant's account. Note: This error is based on previous enrollments either submitted via file or keyed in manually.	If the participant didn't change his or her election, verify the election amount is correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Employees tab. 3) Search for and select the participant. 4) In the Active enrollments section, select the applicable plan. 5) Contact us for assistance if the election amount is correct. Note: If the participant did change his or her election, verify the effective date is correct.
Elections cannot be defined for Open Ended HSA Plans. Value on file must be $0.00.	For health savings accounts (HSAs), the election amount should always be 0.00.	Verify the election amount is 0.00. Note: HSA contributions are included on the contribution file.

Election Amount and Employer Contribution cannot be $0.00 if there is no enrollment termination date.	For flexible spending accounts (FSAs) and commuter benefits plans, our system requires an election amount greater than 0.00 in order to enroll the participant in the plan.	Verify the election amount is greater than 0.00. Remove the participant from the file if he or she didn't elect any plans.
ElectionAmount plus EmployerContributionAmount is less than paid claims to date.	The election amount (plus the employer contribution amount, if applicable) can't be less than the total paid claims, even if it's just by a few cents.	If a participant is reducing his or her election due to a qualifying life event, don't lower it to less than the amount we've already reimbursed for claims.
ElectionAmount is not the correct format.	The election amount includes symbols or is an invalid number.	Update the election amount by removing dollar signs and using two decimal places. Example: 2000.00, not $2000.00 or 2000.0000 or 2000

PlanName field

Error message	**Explanation**	**Action**
PlanName xxxx not found.	The plan name on the file doesn't match a plan name in our system.	Review your active plans in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Imports tab. 3) Click "+ New import." 4) In the Import type section, select the Enrollment template. 5) Click "Next." 6) Click "View file setup requirements." 7) Click "View plans."

xxxxxxxxx does not match a plan name that the participant can enroll in.	The plan name on the file doesn’t match a plan name in our system.	Review your active plans in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Imports tab. 3) Click "+ New import." 4) In the Import type section, select the Enrollment template. 5) Click "Next." 6) Click "View file setup requirements." 7) Click "View plans."
The consumer's address cannot be a P.O. Box when enrolling in an HSA.	A participant enrolling in a health savings account (HSA) must have a valid physical address due to federal regulations regarding the validation process for opening an HSA.	Include a physical address to enroll the participant in our system. If a physical address isn’t available, manually add the mailing address in the employer portal.

EnrollmentEffectiveDate field

Error message	**Explanation**	**Action**
EnrollmentEffectiveDate cannot be prior to a confirmed or posted payroll date.	An enrollment effective date can’t be retroactively changed if payroll deductions have already posted to the participant’s account.	Contact us for assistance.
The EnrollmentEffectiveDate cannot be before an existing effective date.	An updated enrollment effective date must be after the previous enrollment effective date in our system.	Contact us for assistance.

Invalid Format - Date must be formatted as {MMDDCCYY}.	The enrollment effective date is formatted incorrectly.	Adjust the date to be in the correct format.

EmployerContribution field

Error message	**Explanation**	**Action**
EmployerContributionAmount (xxx.xx) is less than posted or confirmed contributions to date (xxx.xx).	The employer contribution amount can't be less than the total employer contributions already posted to the participant's account.	If the participant didn't change his or her election, verify the contribution amount is correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Employees tab. 3) Search for and select the participant. 4) In the Active enrollments section, select the applicable plan. 5) Contact us for assistance if the election amount is correct. <u>Note</u>: If the participant did change his or her election, verify the effective date is correct.
Plan is not configured for Employer Contributions.	The plan listed on the file isn't set up to receive employer contributions.	Leave this field blank.

EnrollmentTermDate field
Note: Only utilize the EnrollmentTermDate field when directed by us to communicate a loss of eligibility.

Error message	Explanation	Action
EnrollmentTerminationDate received for a Participant that is not enrolled in the specified plan.	This error occurs when you try to enroll an employee in a plan and terminate that enrollment the same day, preventing the enrollment from processing.	Leave this field blank if the participant is actively enrolled in the plan. Remove the employee from the file if he or she didn't elect the plan. If the employee was enrolled in a plan by mistake, contact us for assistance.

Troubleshooting contribution file import errors

This article explains how to troubleshoot errors for contribution files when you import them through the employer portal.

If errors occur when you import a contribution file, there are steps you can take to determine what caused the errors and how to resolve them before you import the file again.

Important
- After you troubleshoot the file errors outlined in the action steps below, see How to correct and resubmit Benefits files for instructions.

Within the exception report, review all items with a severity of 'Error' on the Sheet3 tab of the spreadsheet.

Note: The error data always refers to the information on the file, not what's in our system.

Click the applicable field name for a file error to learn why the error occurred and how to resolve it:

EmployeeIdentifier
ContributionDate
ContributionDescription
ContributionAmount
PlanName

EmployeeIdentifier field

Error message	Explanation	Action
Participant with Id (xxxxxxxxx) cannot be found.	We don’t have a participant in our system with the same social security number (SSN) or employee number.	Verify the SSN and employee number are correct in the employer portal. To do so, complete the following steps: 1) Log into the employer portal. 2) Navigate to the Employees tab. 3) Search for and select the participant. 4) Click "View profile." 5) Review the participant's SSN on the Personal tab, and review his or her employee number on the Employment tab. Note: If you update the SSN and/or employee number, click "Save changes" after each change you make. Also ensure the participant is enrolled in the plan for which the file includes a contribution.

ContributionDate field

Error message	Explanation	Action
Contributions cannot be processed when consumer's enrollment is terminated.	The contribution can't be processed because the participant is terminated in our system.	Contact us for assistance.
MM/DD/YYYY is already posted for that participant.	The contribution for that date and plan has already been posted to the participant's account.	Ignore this error.
MM/DD/YYYY does not match a scheduled contribution date for Payroll Deduction with the xxxxxxxxxxxxx plan.	Scenarios: • The participant isn't enrolled in the plan to which the contribution record is being made. • The participant is enrolled in the plan, but the contribution date doesn't match a scheduled payroll deduction date. • The contribution date is prior to the participant's enrollment date.	Contact us for assistance.
Invalid Format - Date must be formatted as {MMDDCCYY}.	The contribution date must be formatted as an 8-digit date with no slashes.	Update the formatting to MMDDCCYY.

ContributionDescription field

Error message	Explanation	Action
The value '______' is not valid for the field 'ContributionDescription'.	The data is invalid.	Indicate Payroll or Employer.

ContributionAmount field

Error message	**Explanation**	**Action**
Contribution Amount is negative for participant (negative contribution not possible for HSA plan).	Negative values aren't allowed for health savings accounts (HSAs).	If an amount needs to be deducted from the participant's HSA, contact us for assistance.
The contribution amount received for the participant places the participant over their election amount for that plan.	Total contributions can't exceed the participant's election amount.	Contact us for assistance.
Invalid Format - Amount must be formatted as 100.00.	The contribution amount includes symbols or is an invalid number.	Update the contribution amount by removing dollar signs and using two decimal places. <u>Example</u>: 100.00, not $100.00 or 100.0000 or 100 Ensure the amount is per pay period.

PlanName field

Error message	**Explanation**	**Action**
Plan Name xxxxxxxxxxxxxx not found.	Scenarios: • The participant isn't enrolled in the plan to which the contribution record is being made. • The participant is enrolled in the plan, but the contribution date is either prior to or after the participant's active enrollment dates. <u>Example</u>: The enrollment effective date is 10/1, but the contribution date is 9/30.	Ensure the participant is enrolled in the correct plan or update the plan name to match what's listed in our system. Update the contribution date to fall within the dates of the participant's active enrollment.