

Portal Upload Legend

Below are the instructions on how to download a file template and upload files using the Employer Portal.

Downloading a File Template and Importing a File:

1. Log in to the employer portal using your username and password credentials.
2. From the left-side menu, select 'Imports'.



3. Click +New Import



4. Import Type: select the appropriate file template.

Contribution

5. Optum recommends saving the file as a .csv to avoid formatting issues occurring in Excel but you can use .xls, .xlsx or .csv. Notably, Excel tends to drop leading zeros from SSNs if the file formatting is not correct. One option to avoid dropping the leading zeros is to format the entire column with a custom format of nine zeros (000000000).

Contribution Record

1. Select Contribution from the Imports Page

Import type

Select the template you would like to import.

Contribution >

Submit employee payroll deductions or employer contributions.

Demographic >

Add employees or update existing employees.

Enrollment >

Enroll employees in plans, change employee elections, or terminate existing enrollments.

Transportation Services >

Managing transit and parking services information.

2. The portal offers the option to download a pre-populated template. You can also use a saved template or download a blank one.
- a. By checking the Pre-populate template box, you will be offered the option to choose a Plan year and then the plan types to include on the template. You can upload one file that contains contributions for all applicable plan types or upload individual files by plan type. The pre-populated template will automatically populate the SSN and Plan Name for any employees enrolled in the chosen plan year and plan types. For example, if John Doe is enrolled in the Dependent Care FSA and the Health Care FSA for the 1/1/2021-12/31/2021 plan year, his record will appear on the template twice, once for each plan. You would need to fill in the Contribution Date, Contribution Description, Contribution Amount, and the Prior Tax Year (this field only applies to HSA plans) fields.

Download Contribution template

Alternatively, you can set up one-time or scheduled contributions by going to the Set up Contributions page.

Pre-populate template ⓘ

Plan year
01/01/2021 - 12/31/2021

Select plans to pre-populate

Dependent Care FSA

Health Care FSA

HRA

[Download template](#)

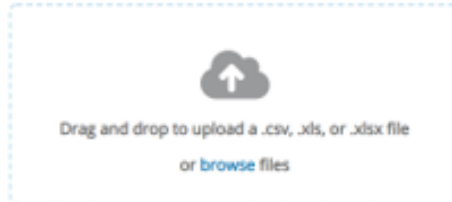
Cancel [Back](#) [Next](#)

3. The values and formatting requirements for the contribution record are listed below.
4. Once you have completed the data entry and saved your file, you can either drag and drop your file for upload or use the browse link to locate the file on your computer.

Upload Contribution file

Certain fields must match information setup by your administrator. If you need help setting up your file, please review the file setup requirements.

[View file setup requirements](#)



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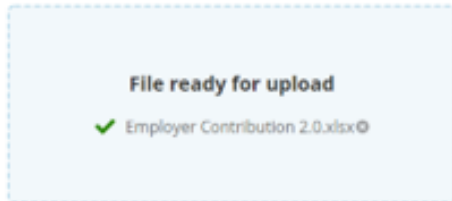
[Import](#)

- Once you have uploaded the file, be sure to click the blue Import link at the bottom of the screen.

Upload Contribution file

Certain fields must match information setup by your administrator. If you need help setting up your file, please review the file setup requirements.

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Column	Title	Valid Value/Format	Required
A.	Employee Identifier	SSN – No Dashes	Y
B.	Contribution Date	MMDDYYYY	Y
C.	Contribution Description	Employer or Payroll	Y
D.	Contribution Amount	0.00	Y
E.	Plan Name	HSA	Y
F.	Prior Tax Year	Current or Prior	ONLY for HSA Plans