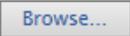# Portal Upload Legend

Below are the instructions on how to download a file template and upload files using the Employer Portal Import Tab. The one-minute video titled Employer Portal: Managing Data Imports briefly reviews the Import Tab process.

Downloading a File Template and Importing a File:

1. Log in to the employer portal using your username and password credentials.
2. From the 'Imports Tab' select 'Import Data'.
3. Data To Import: select the appropriate file template from the dropdown list
    i. Open the template in Excel.
    ii. Enter or copy and paste your data into the template.
    iii. Please review the Valid Values/Format column below for input data
    iv. Save a copy of the file as .xlsx, .xls or .csv (Comma Delimited) format. Note: .csv is the preferred way of saving your file but once the file is saved as a .csv it is best not to reopen the file before uploading to avoid losing formatting.
4. Upload File by clicking the [Browse...] button; locate the file saved on your computer and select Import Data.
5. Refresh the Import Queue to view Pending, Failed, In Process and Completed files.

Demographic Record Layout - When you review the file load on the portal, this record will show as a Participant and not Demographic.

Enrollment Record Layout

Contribution Record Layout

Demographic Record

Column	Title	Valid Value/Format	Required
A.	Employee Identifier	**SSN – No Dashes**	Y
B.	Last Name		Y
C.	First Name		Y
D.	Date Of Birth	MMDDYYYY	Y
E.	Address Line1		Y
F.	Address Line2		Optional
G.	City		Y
H.	State	USPS Standard State Code	Y
I.	Zip	5 or 9 or 10 with dash	Y
J.	Country	Standard 2 Character Code Example: US	Y
K.	Home Phone	No Dashes	Optional
L.	Employee Number		MUST LEAVE BLANK
M.	Employer Employee ID		Optional
N.	SSN	No Dashes	Y
O.	Division	Use Division(s) from Health Advantage	Y
P.	Class	Class	Y
Q.	Payroll	Use Payroll(s) Name from Health Advantage	Y
R.	Payroll Effective Date	MMDDYYYY (If no change in payroll frequency, should match Hire Date)	Y
S.	Employment Status	Active, Terminated, LOA	Y
T.	Status Effective Date	MMDDYYYY (If Active, should mirror Hire Date. If Terminated, should be date of termination date or loss of coverage date)	Y
U.	Hire Date	MMDDYYYY (most recent hire date)	Y
V.	Incur Services	Y or N	*Required only for LOA Employment Status
W.	Hold Payroll Deductions	Y or N	*Required only for LOA Employment Status
X.	Hold Employer Contributions	Y or N	*Required only for LOA Employment Status

Enrollment Record

Column	Title	Valid Value/Format	Required
A.	Employee Identifier	**SSN – No Dashes**	Y
B.	Election Amount	Total Dollar Amount of the Participant's Election *Should be 0.00 for HSA and RRA	Y
C.	Plan Name	Use Plan Name(s) from Health Advantage	Y
D.	Enrollment Effective Date	MMDDYYYY	Y
E.	Employer Contribution		N* – Leave blank for HSA, FSA, DCA plans.*Required for RRA and HRA plans.
F.	Enrollment Term Date	MMDDYYYY	N* Should only be used when terminating enrollment and not employment.
G.	Primary Reimbursement	Leave Blank	N
H.	Election Amount Indicator	PerPay	N* Required only for HSA plans.
I.	HDHP Coverage Level	Single or Family	N* Required only for HSA plans.
J.	Enrolled in Claims Exchange	Y or N	N
K.	HSA Terms Flag	Y or N	N* Required only for HSA plans; if no, consumer will need to accept Terms and Conditions.

Error! Reference source not found.

Contribution Record

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	Use Plan Name(s) from Health Advantage	Y
F.	Prior Tax Year	Current or Prior	ONLY for HSA Plans