GUIDE TO ENROLLMENT AND CONTRIBUTION FILE IMPORTING

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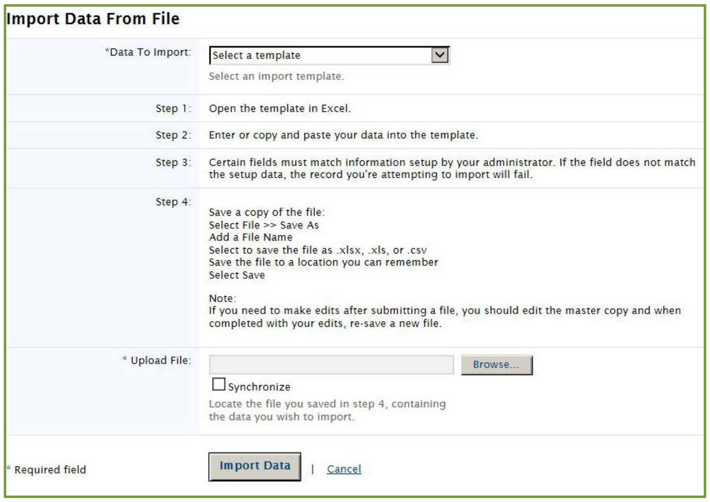
Guide to Enrollment and Contribution File Importing, continued

To enroll employees in your benefit plan(s) via file, you'll need to complete the Demographic and Enrollment File Templates and upload them to the Employer Portal. The Contribution File Template is used to pass payroll deductions and/or employer contributions to the benefit plan(s). Files can take up to 24 hours to process.

- **Demographic File:** Contains basic employee information, including name, date of birth, social security number, address and email address. This information will establish the employee in the Discovery Benefits system.
- **Enrollment File:** Contains plan enrollment information, including effective date, annual election and plan name.
- **Contribution File:** Contains payroll deductions, payroll dates for participant contributions to be posted to a plan, and also may include employer contributions.

Step 1: Hover your mouse over the Imports tab and click Import Data.

Step 2: In the "Data To Import" field, select the file type you intend to import. After selecting a file type, a View Setup Data link will populate with some helpful information for completing the file. **Note:** The Demographic File needs to be submitted and successfully processed before the Enrollment File is submitted when enrolling new employees.


Import Data From File

*Data To Import:	Select a template Select an import template.
Step 1:	Open the template in Excel.
Step 2:	Enter or copy and paste your data into the template.
Step 3:	Certain fields must match information setup by your administrator. If the field does not match the setup data, the record you're attempting to import will fail.
Step 4:	Save a copy of the file: Select File >> Save As Add a File Name Select to save the file as .xlsx, .xls, or .csv Save the file to a location you can remember Select Save Note: If you need to make edits after submitting a file, you should edit the master copy and when completed with your edits, re-save a new file.
* Upload File:	Browse... Synchronize Locate the file you saved in step 4, containing the data you wish to import.
* Required field	Import Data | Cancel

Step 3: Click "Open Template." If you were previously provided a file template, this file can be opened manually instead.

Step 4: Populate the file.

- Bold fields are required and must be completed in order for your file to successfully process.
- Fill in as many fields as possible in your file to provide adequate information for your employees' accounts.
- Certain fields within the file must contain information specific for your plan design. If the field does not match this information exactly, the record you're attempting to import will fail.

Most common errors:

- **Demographic File:** Division, class and payroll are the most common formatting errors on the Demographic File. If division names were not provided before setup, this column must be left blank.
- **Enrollment File:** Plan name is the most common formatting error on the Enrollment File. Ensure the plan name is typed exactly how the plan design lists it. The "Enrolled In Claims Exchange" column must be populated if a Claims Exchange file feed from your insurance carrier(s) is part of the design or it will not be activated as a reimbursement option for participants.
- **Contribution File:** The plan name on the file does not match an enrollment for the participant, the contribution date does not match a scheduled deduction date in Discovery Benefits' system or the demographic/enrollment data has not yet been sent to Discovery Benefits.

Guide to Enrollment and Contribution File Importing, continued

Step 5: Once the file is populated, save a master copy in an XLS format.

- Saving a master copy will allow you to easily update the file and refer back to it.
- To save the file, click “File” and select “Save As.” This will open a new window. Browse to the location you want to save the file to. Enter a file name you will easily recognize, choose Excel Workbook in the Save As type field and click “Save.”

Step 6: Save a copy of the master file to import in a CSV or XLS format. A new CSV or XLS file should be created each time you intend to import a file.

Step 7: Import the CSV or XLS file. **Please note:** The CSV file should not be opened prior to importing it. This will cause the formatting to be changed. If the CSV file is opened, a new CSV file must be saved in order to be successfully imported.

- On the employer portal, click “Browse” in the “Upload File” field. Locate the CSV or XLS file that you saved on your computer and click “Open.” Your file name will now appear in the “Upload File” field.
- Leave the Synchronize check box blank.
- Click “Import Data.”
- You will receive a notification that your file was successfully submitted and you will be brought to the Import Queue screen. Verify the Demographic File was successfully imported without errors before importing the Enrollment File.
- Repeat these steps to import the Enrollment File.

Contribution File Import Instructions

To prepare and submit employer or payroll contributions, you will need to upload the Contribution File to the employer portal. To import the Contribution File, follow the instructions outlined above.

There are some alternatives available to uploading a Contribution File in the employer portal each pay period:

- If your Medical or Dependent Care FSA plan uses the auto-post deduction option for your payroll verification, the Contribution File does not need to be imported.
- Discovery Benefits also offers the option to set up an automated file transfer process where the Contribution File is directly transmitted to our servers via SFTP. This requires IT resources to set up and is most commonly used with payroll vendors.

If you are interested in implementing an automated method, please contact our Client Services team.

Troubleshooting

For questions on errors, see the Guide to Resolving File Errors.