HealthEquity

Administrative Process Guide

Macro-Enabled Program Sponsor File

The purpose of this guide is to assist you in completing your Program Sponsor File Template(s). Because this document contains information for a wide array of our benefits, it will be important for you to get clarification on which sections apply to your benefit.

The Template

This template includes the following tabs: Enrollment, Funding, and Instruction information, as well as macros to help ease the Audit and File Creation process.

Profile and Enrollment Records

The Profile tab is used to create benefit eligibility, as well as provide an employee's demographic information. The Enrollment tab is used to create enrollments for most Health benefits, and some Commuter plans. Note: Clarify with your Implementation Manager if you are not sure which tabs are required.

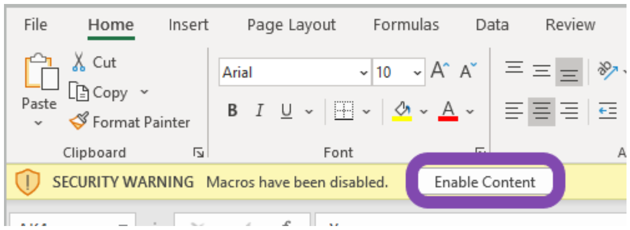
- A Profile (PRO) record reflects an employee's demographic information and is what establishes them in the system. This record is required before any other records will load.
  - PRO records are needed for any Healthcare benefit (FSA, HRA, ESP) enrollees
  - ALL employees eligible for Commuter require a PRO record as well

- An Enrollment (ENR) record identifies what benefit the member should be enrolled in.
  - These are most often needed for FSA, HRA, ESP, and CAM plans
  - The use of this template for HSA enrollment should be discussed in advance with your Implementation Manager

Instructions for completing the templates:

1. Open the PSF SMB Macro Template excel document, and view the following tabs:
   - PSF Template for Profile
   - PSF Template for Enrollment
   - PSF Template for HSA Enrollment (If needed, as guided by your Implementation Manager)
   - PRO Spec | ENR Spec | HSA ENR Spec (If applicable) | FND Spec – you can refer to these tabs if you have questions on any of the fields on the PSF Template for each respective tab that cannot be answered by the field headings (noted by the hover over red triangle within different fields).

2. If you receive a security warning upon opening the document, select Enable Content



3. The Macro buttons shown here will allow you to audit and save your file in the proper format

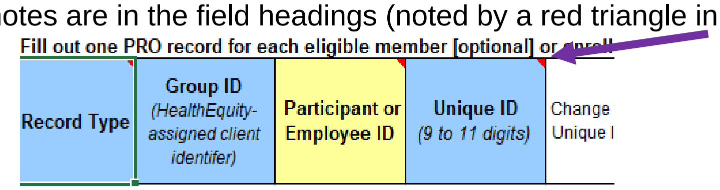
4. Complete each of the applicable template tabs. ***All fields in blue are required.*** Fields in yellow are ***optional***, though include an email address if you have it. White fields are ***usually left blank.***

5. **It is important that you do not change, move, delete, or hide any columns**. You can add or delete additional rows as needed

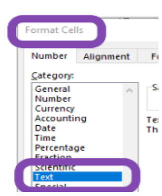
6. If you are loading both profiles and enrollments, each file should be uploaded individually, beginning the PRO records.

Important Notes

- Additional notes are in the field headings (noted by a red triangle in the corner)

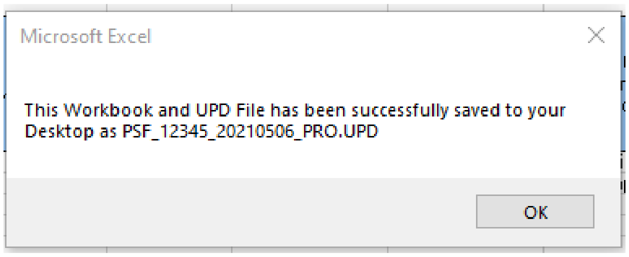


- Ensure the date fields are formatted correctly, as shown in the example (7/25/1986)
- To prevent leading zeros from being dropped, format the entire column as “Text” before inputting data. In Excel, select the fields or column you want to format, right-click and select ***> Format Cells > Number > Text***



- Once all the data is entered, select the “Audit” Macro button to ensure there are no formatting errors. Correct any that appear on the list and are highlighted red.

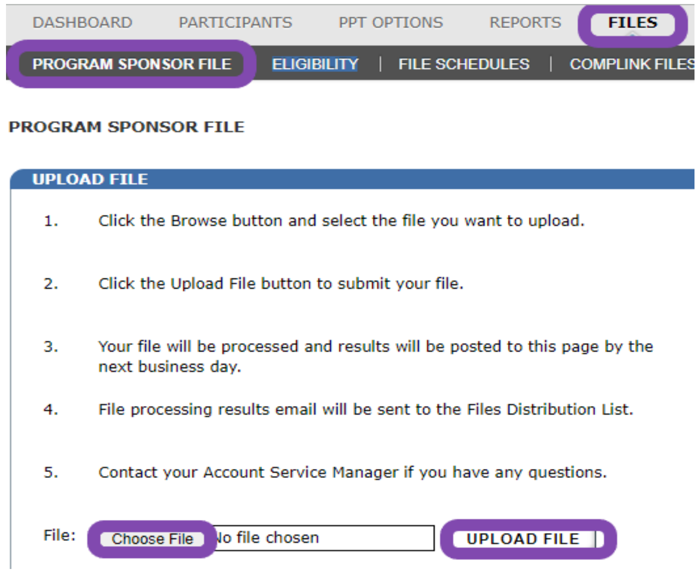
- When you have an error-free audit result, you can select Create File”. Please note the specific name and location. You will need this information to upload your file.



Uploading Files

When uploading files to the HealthEquity/WageWorks, please follow these steps:

1) Login to the HealthEquity/WageWorks Employer Website: https://Employer.WageWorks.com
2) Select the “*Files*” tab
3) Select the “*Choose file*” button (mid-way through the screen) and select your file from its location on your computer (typically the Desktop). Then select “*Open*” from the Choose File window.
4) Select the “UPLOAD FILE” button. A file upload status message is displayed
   - **Important Note**: Do **NOT** use your Internet refresh option to view an updated status. This could cause the file, especially funding records, to post duplicates. If you choose to Refresh the page you can do so by selecting the “*Files*” tab. (The page should update automatically)



File upload status messages

You may see one of these messages after uploading your file:

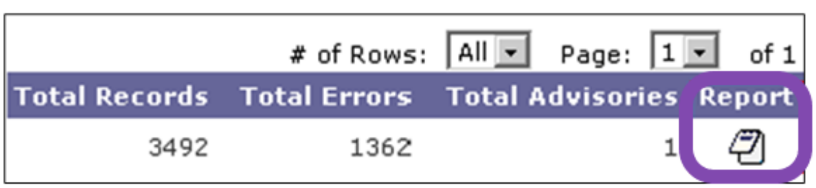
- *"Your Program Sponsor File transferred successfully"*- Indicates no critical errors preventing your file from uploading
- *"Your Program Sponsor File failed to transfer successfully. Please correct the CRITICAL FILE ERRORS outlined below and resubmit the file"* - Indicates critical errors preventing your file from uploading
- Files are typically processed and posted within two business days; pre-processing will display early results within a few hours

File Posting

- Once the file posts, a Program Sponsor email notification is generated letting you know the status of the file. Let your Implementation Manager know who on your team should receive these status email notifications. They will need to be setup on the employer portal.

Viewing Results

1. From the list of submitted files, select the '*notepad icon.'* It is located under the *Report* column associated with your recently uploaded file on the far-right side of the row. **Note**: Verify you are reviewing the correct file name before selecting the *Report*.



2. From the file detail page, you can view Errors or Advisories with corresponding messages. To view Error or Advisory detail, select the corresponding "*number*" under the *Count* column.

ENR		
Severity	**Message**	**Count**
Error	Employee not found by the Unique ID.	3
Advisory	Coverage Effective Date has changed.	1
Advisory	Election Amount has changed.	1

3. If your file Status displays Rejected rather than Posted, please correct any errors, save the file again, and upload your corrected file.

STATUS
Posted

Other Considerations

Macro Security

Some clients may have security restrictions from enabling macros, while others may be required to 'Enable Macros' before using the template. Different versions of MS Office require different steps to enable macros. The decision to adopt or prohibit use needs to remain at your discretion.

Using with Apple, Mac Devices

As of September 2018, Mac with Office 365 can use this template; however, users with prior versions installed on their device may still experience issues with the End of Line (EOL) – Carriage Return (CR) and Line Feed (LF). If this is an issue, most commonly the file will generate to the desktop and then fail when attempting to load through the **FILES** tab with an 'unexpected error'. In these instances, ask your Implementation Manager and/or Client Services Team for other resources.

Reminder about the Unique ID

It is critical that data is accurate in this field to avoid data corrections or duplicate records. In general, the member SSN should be used as the Unique ID value (field 4 on all records). If any other value is required, please ensure that you discuss the implications with your Implementation Manager before using this template.

Dummy Data

Reminder: Please remove any sample or dummy data prior to posting live files

Using with a Distributor File

If you send information through a distributor file, please consult with a technical resource before using this form

Final Notes

- When your files post successfully, employees can register for their online accounts.
    - FSA/HRA/ESP members can review their balances and file claims
    - Commuter participants can create their initial elections
- You may need the Funding (FND) record to post FSA deductions to our system unless you set up an Auto-Pay Calendar during implementation. The FND record can also be used for Commuter Account Model (CAM) deduction information
- Please reach out to your Implementation Manager and/or our Client Service team with any questions. For RA, call 855.428.0447. For HSA, call 866.382.3510
- Information provided in this guide should not be taken as tax or legal advice