



Quick Guide

Portal Enrollment File Upload

The Portal Enrollment File Upload method lets you automatically enroll all your HSA-eligible employees in your HSA program at once. This is a step-by-step guide. (**Note:** This guide explains how to manually format your employees’ information. For an automated experience, you can use our Enrollment File Builder Tool at hsabank.com/enrollmentfilebuilder.)

Step 1

In the Employer Administration Site, click the IMPORTS tab and choose “Import Data” from the dropdown menu. Download and save the demographic template and the enrollment template.

Step 2

Fill out your saved demographic template.

Keep in mind:

- Do not change the formatting of the file name or the header row (row 1).
- All fields in **bold** are required.

	A	B	C	D	E	F	G	H	I	J	K
1	EmployeeIdentifier	LastName	FirstName	DateOfBirth	AddressLine1	AddressLine2	City	State	ZipCode	Country	Username
2											

- Click any cell to view a description of what’s required.*

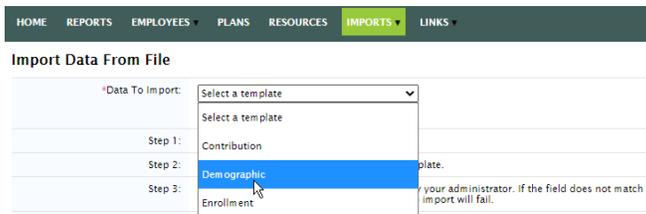
	A	B	C
1	EmployeeIdentifier	LastName	FirstNa
2			
3			
4		EmployeeIdentifier (Req) Enter consumer’s SSN without the dashes.	
5			

- If a data point contains a leading zero, make sure the cell is formatted as text to include the zero.
- If possible, do not include P.O. Boxes. Including them may cause processing delays.

Step 3

Resave your demographic file after you have finished filling it out and have reviewed it for accuracy. Now it’s ready to be uploaded.

- In the Employer Administration Site, return to the Import Data page.
- For the “Data To Import” field, choose “Demographic” from the dropdown.

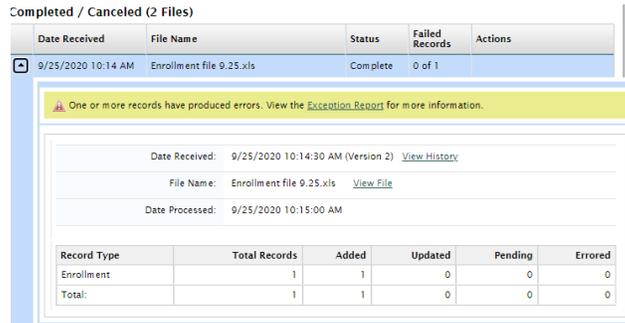


- Upload the file.
- Click the “Import Data” button. You’ve now finished uploading your demographic file.
- Check the status of your upload to make sure it was successful: Click the IMPORTS tab and choose “Import Queue” from the dropdown menu.



Completed / Canceled (1 Files)					
	Date Received	File Name	Status	Failed Records	Actions
▼	9/25/2020 8:48 AM	Demographic file 9.25.xls	Complete	0 of 1	

- If any errors are shown, you can click on the line item of the file to expand the menu of options. You can then open the Exception Report to view information about the errors and how to correct them.



Step 4

Fill out your saved enrollment template.

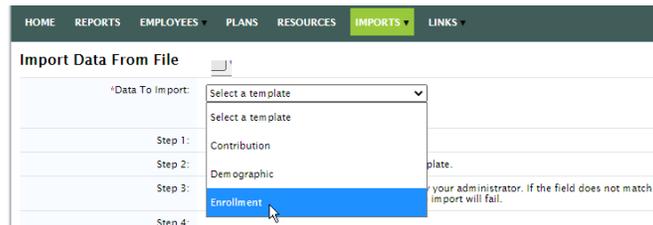
Similar to Step 2, keep in mind:

- Do not change the formatting of the file name or the formatting of the header row (row 1).
- All fields in **bold** are required.
- Click any cell to view a description of what’s required.*

Step 5

Resave your enrollment file after you have finished filling it out and have reviewed it for accuracy. Now it’s ready to be uploaded. (**Note:** Your demographic file must be uploaded successfully, without errors, before your enrollment file.)

- To upload your enrollment file, follow the same steps listed in Step 3, except choose “Enrollment” in the “Data To Import” field.



- Again, similar to Step 3, check the status of your enrollment file upload to make sure it was successful. You’ll need to correct any errors.

You’ve now finished your Portal Enrollment File Upload! HSA Bank will process your files within two business days. You can recheck the status of your files at any time.

Questions?

If you have any questions or need assistance, please contact our Business Relations team, available Monday through Friday, 7 a.m. to 7 p.m. CT.

Phone: 866-357-5232

Email: businessrelations@hsabank.com

**Please see the following page for guidance on filling out the demographic file and the enrollment file.*

Please fill out the DEMOGRAPHIC file as follows:

- Column A – Social Security number (no punctuation)
- Column B – Last name
- Column C – First name
- Column D – Date of birth
- Column E – Physical address (not a P.O. Box)
- Column F – Not required but can be used for apartment numbers
- Column G – City
- Column H – State
- Column I – ZIP code (no punctuation)
- Column J – Country (U.S.)
- Column K – Leave blank
- Column L – Leave blank
- Column M – Email address
- Column N – Phone number
- Column O – Internal employee number if available, otherwise any alphanumeric number up to 15 characters (not SSN)
- Column P – Leave blank
- Column Q – Social Security number (no punctuation)
- Column R through Column W – Leave blank
- Column X – Hire date (no punctuation)
- Column Y – Leave blank
- Column Z – Leave blank
- Column AA – U.S. Citizen, Resident Alien, or Non Resident Alien (use dropdown menu)
- Column AB – Leave blank if U.S. Citizen, otherwise enter 2-digit country code for country of birth
- Column AC – Employed, Not Employed, Self Employed, or Retired (use dropdown menu)
- Column AD – Required if entered “Employed” in Column AC
- Column AE – Required if entered “Employed” in Column AC

Please fill out the ENROLLMENT file as follows:

- Column A – Employee Social Security number (no punctuation)
- Column B – Enter “0.00” for all employees
- Column C – Enter “Health Savings Account” for all employees
- Column D – Effective date (no punctuation)
- Column E – Leave blank
- Column F – Leave blank
- Column G – Leave blank
- Column H – Select “PlanYear” for all employees (required for HSA enrollments) (use dropdown menu)
- Column I – Employee’s level of insurance coverage, Single or Family (required for HSA enrollments) (use dropdown menu)
- Column J – Leave blank
- Column K – Leave blank