



Group Online Enrollment Guide

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Welcome

BenefitWallet®, A Xerox Solution, welcomes you and your employees. The Bank of New York Mellon (BNY Mellon) is the custodian of the FDIC-insured HSA checking account. We are one of the leading administrators for Health Savings Accounts (HSAs) providing administrative services and support to employers and members.

This guide is prepared for you to summarize the online enrollment process. Our Employer Support Team is available to you and our website provides information and tools to assist you.

To get started, you will need your User ID and password to log in to mybenefitwallet.com. If you are the Primary Business Contact, this is your sub-account number or the User ID you created. If you are a Sub-User, your User ID was designated by the Primary Business Contact for your organization.

Group Enrollment

This document provides additional information about the online enrollment process. The Group Enrollment function is available through the Eligibility & Enrollment left menu. It is viewable to the primary business contact and all additional users with group enrollment access.

BenefitWallet's Enrollment Engine Application represents a significant advancement in the way employers provide and update employee enrollment information. The application offers a secure site for group or individual enrollments and updates.

Enrollment Process Highlights:

- Enroll individual employees in a BenefitWallet savings or spending account program
- Enroll multiple employees or an entire group using the enrollment spreadsheet method
- Enrollments successfully uploaded by 4:00 p.m. (ET) are added to the system the same day
- Employment status or coverage changes can be submitted on the View/Modify Enrollee option. **Individuals with open accounts can update their addresses online.**
- Welcome materials are mailed to each employee's address after processing enrollment.

Group Online Enrollment Summary

- Ability to submit enrollment information in a secure application without development of files or secure transmission protocol
- Ability to submit employee additions and terminations (due to employment or coverage changes). **Individuals with open accounts can update their addresses online.**
- Alternatives to more efficiently submit information for up to 200 employees at a time.
- By selecting options from the toolbar on the left side of the screen you can complete Bulk or Group Enrollment, Add Individual Employees or View/Modify Existing Records.

Key Points

- Multiple or Group uploads can be made using the Group Enrollment spreadsheet.
- Individual employee uploads can be made by using the Enroll an Individual Employee link.
- Employee employment status or health plan coverage changes can be made through the View/Modify Enrollee Information link. **Individuals with open accounts can update their addresses online.**
- Multiple files can be uploaded in one day. The files are saved with a time/date stamp.
- Contact the Employer Support Team for SSN corrections or changes.
- Enrollments successfully uploaded by 4 pm (ET) will be added in 1 – 2 business days.
- **Only web users designated under Manage Access will have access to the Group Online Enrollment tab.**
- Contributions (employer and/or employee payroll) cannot be made until the employee has opened their HSA.

Uploading Files

Through group enrollment you can readily process up to 200 enrollments through a single spreadsheet upload.

1. Select the tab for the account type for which you are submitting enrollment, download and open the spreadsheet. Enable macros if prompted.
2. Once the Excel spreadsheet is downloaded and ready for input. Save the spreadsheet.
3. Complete the spreadsheet and run the macro if you wish to upload a text file.
4. Upload your file on website.

Enrollment loaded by 4pm EST Monday through Friday will load that evening and will be available in reports the following morning.

The screenshot shows the BenefitWallet Group Enrollment interface. The top navigation bar includes the BenefitWallet logo, a welcome message for 'Demo Employer HSA HRA FSA 1', the last login time '08/18/2016 at 11:19 AM', and a 'Logout' button. The left sidebar contains a menu with options: Home, Payroll Processing, Reporting, Eligibility & Enrollment (expanded), Employer Profile, Member Information, Manage Notifications, Employer Toolbox, Logout, and Collapse menu. The 'Eligibility & Enrollment' section is further divided into 'Group Enrollment', 'Enroll an Employee', and 'View/Modify Enrollee Information'. The main content area is titled 'Group Enrollment' and features a three-step process: 1. Download, 2. Upload, and 3. Done. Under the 'Download' step, there are two tabs: 'Excel HSA Spreadsheet' and 'Excel Payment Accounts Spreadsheet'. Below the tabs, instructions state: 'Download the HSA or Payment Account(s) Spreadsheet and save a copy on your PC Computer. Do not change the name of the spreadsheet.' There are input fields for 'Client ID' (202) and 'Employer ID' (DE5), followed by a 'Download' button. Further instructions specify: 'Enter the required employee census information on the "census tab" of the spreadsheet. a. Census data is required for all account types. b. Enter plan details on the "enrollment tab" of the spreadsheet. Enrollment data is required for Payment Accounts. After entering employees' data, Save the file as .xlsx format. To assist you with this process, please download the step-by-step instructions manual.' A PDF icon and a link to 'Group Enrollment Guide' are provided. A 'Next' button is located at the bottom right.

Completing the Spreadsheet

The Customer Identification Code and Employer Identification Code for your group have been assigned to you BenefitWallet Employer Support. They are displayed on the home page of the Group Enrollment Tab.

Data can be 'cut-and-pasted' into this spreadsheet in the format required. After completing input, resave the document with information and upload the file as an excel file or text file. To create a text file, proceed to "run" the macro (completed by "clicking the pencil" in the toolbar for Microsoft 2003 or lower). The text file can be found on the same folder as the saved excel spreadsheet.

HSA file:

| | A | B | C | I | J | K | L |
|---|--|--|--|-----------------------|------------------------|----------------------------|-----------------------------------|
| 1 | Export Social Security number Required | Customer Identification Code Required | Employer Identification Code Required | Last Name Required | First Name Required | Middle Initial Optional | Street Address Line 1 Required |
| 2 | 222222222 | 202 | DE5 | Test | Employee | | 123 Main Street |
| 3 | 333333333 | 202 | DE5 | Doe | John | | 345 Spring Street |
| 4 | 444444444 | 202 | DE5 | Sample | Name | | 678 Oak Street |
| 5 | 555555555 | 202 | DE5 | Smith | Jane | | 901 Elm Street |

Payment Accounts File

| | A | B | C | D | E | F | G | H | |
|----|-----------|--------|-------------------|----------------|---------------|------------|---------------|------------|----------------|
| 1 | C-SSN | Export | C-TransactionType | C-TransEffDate | C-Customer ID | C-Employer | C-BenefitType | C-PlanYear | C-PolicyAmount |
| 2 | 123451000 | N | | 01/01/2015 | 006 | IB2 | FSA | 01/01/2015 | \$2,600.00 |
| 3 | 123452000 | N | | 01/01/2015 | 006 | IB2 | DCAP | 01/01/2015 | \$5,000.00 |
| 4 | 123453000 | N | | 01/01/2015 | 006 | IB2 | HRA | 01/01/2015 | \$4,000.00 |
| 5 | | | | | | | | | |
| 6 | | | | | | | | | |
| 7 | | | | | | | | | |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | | | | | | | | | |
| 13 | | | | | | | | | |
| 14 | | | | | | | | | |

Benefit Type

Choose from:

* FSA

* DCAP

* HRA

* HIA

* RSA

* MSA

* TRP

Benefit Type
Choose from:
* FSA
* DCAP
* HRA
* HIA
* RSA
* MSA
* TRP

Loading Data

Select the plan and file type you will upload. Select the file using the Browse button. Then Upload – controls are built to ensure the proper file type is uploaded.

An immediate format and data review will occur. You will be advised of successful completion of the load or of errors that require correcting before proceeding. Once records are loaded without issue, select save.

You will receive confirmation and further indication of any records that cannot be uploaded.

1Download

2Upload

3Done

Upload Enrollment Excel/Txt File and submit.

Plan Type

HSA

Excel File

☒ Excel File ☐ Txt File

Excel File

HSA_DE5_202_2016.08.18.11.30

Back

Upload

3Done

Group Enrollment File Exception Processing

Validations errors(Highlighted below in red) were identified during the file upload process. Please verify the member's data below for accuracy. If corrections are needed, make them on the spreadsheet and upload the spreadsheet again.

Census

Click on the ▼ for more details, if available.

| Serial Number | Social Security Number | Customer Identification Code | Employer Identification Code | Record Effective date | Alternate Employee ID | Health Plan Member ID |
|---------------|------------------------|------------------------------|------------------------------|-----------------------|-----------------------|-----------------------|
| ▼ 1 | 777777777 | 202 | DE5 | 2016/07/01 | | |
| ▼ 2 | 888888888 | 202 | DE5 | 2016/07/01 | | |
| ▼ 3 | 999999999 | 202 | DE5 | | | |
| ▼ 4 | 000000000 | 202 | DE5 | 2016/07/01 | | |

Enroll an Individual Employee

“Enroll an Individual Employee” is designed for inserting enrollments at the individual level.

Customer ID and Employer ID fields are pre-populated as is a default coverage status of Active. Complete the required information fields, select Save to load this enrollment.

Enroll an Employee - Enter Details

Select Plan Type

HSA

Employee Information

Effective Date

(MMDDCCYY)

Coverage Status

Select

Customer ID

202

Social Security Number

Employer ID

DE5

Customer Name

Optional

Alternate Employer ID

Optional

Employer User Defined

Optional

First Name

Sex

Select

Middle Name

Optional

Date Of Birth

(MMDDCCYY)

Last Name

Old Social Security

Optional

Email

Optional

Address

Street 1

Street 2

Optional

City

State

Select

Zip

Alternate Address

Street 1

Optional

Street 2

Optional

City

Optional

State

Select

Zip

Optional

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View/Modify Existing Records

Select View/Modify Existing Records to update status or information on an existing enrollment. Identify the individual by selecting the Plan Type and entering the SSN. Changes loaded by 4pm EST Monday through Friday will load that evening and will be available in reports the following morning.

When the record is located, select the Edit link. Make the changes and save.

Please note: Social Security Number changes cannot be made using Modify Existing Records. Contact the Employer Support Team for assistance with a SSN change/correction. Individuals with open accounts can update their addresses online.

Employment Status Change

Employment status changes should be made through the View/Modify Existing Record link. Once the employee is no longer employed or covered by the HSA eligible health plan, submit the change through this link by changing the employee's status from "Active" to "Inactive." This will result in the employee's account changing from Active to Independent. Submit the record to change an employee's status from "Active" to "Inactive" on or after the effective date of the change as the record will be changed on the day the record is successfully uploaded (and will not be 'future dated').

| Customer ID | Employer ID | Effective Date | SSN | Alternate Employee ID | Coverage Status | Action |
|-------------|-------------|----------------|-----------|-----------------------|-----------------|---|
| 202 | DE5 | 2016-07-01 | 222222222 | | A | Edit Delete |

Enroll an Employee

[Guides](#)

Enroll an Employee - Edit Details

Select Plan Type: HSA

Employee Information

Effective Date

07/01/2016
(MMDDCCYY)

Coverage Status

Active

Customer ID

202

Social Security Number

222222222

Employer ID

DE5

Customer Name

Optional

Alternate Employer ID

Optional

Employer User Defined

Optional

First Name

EMPLOYEE

Sex

Male

Middle Name

Optional

Date Of Birth

01/01/1978
(MMDDCCYY)

Last Name

TEST

Old Social Security

Optional

Email

Optional

BenefitWallet Service Center

The following are Bank and/or Market Holidays for 2016. For a bank holiday, no payroll will post on these days. For a market holiday, no investment transaction (investment, redemption) will post on these days. For a day that is both a bank and market holiday, neither payroll nor investment transactions will post.

EmployerSupport Team

Phone: 866-712-4551

Hours of Operation (Eastern Time)

8:00 am – 8:00 pm

Monday – Friday

9:00 am – 6:00 pm

Saturday & Sunday

BenefitWallet Member Services

Phone: 1-877-472-4200

TDD: 1-800-833-8334

Hours of Operation (Eastern Time)

8:00 am – 11:00 pm

Monday – Friday

9:00 am – 6:00 pm

Saturday & Sunday

| Day | Date | Holiday | BenefitWallet Holiday | Bank Holiday | Market Holiday |
|----------|------------|-----------------------------|-----------------------|--------------|-----------------------|
| Monday | 10/10/2016 | Columbus Day | | x | |
| Friday | 11/11/2016 | Veteran's Day | | x | |
| Thursday | 11/24/2016 | Thanksgiving Day | x | x | x |
| Friday | 11/25/2016 | Day After Thanksgiving | | | Market Closes 1pm EST |
| Sunday | 12/25/2016 | Christmas Day | x | x | x |
| Monday | 12/26/2016 | Christmas Day Observed | x | x | x |
| Sunday | 1/1/2017 | New Year's Day | Open 9am-6pm EST | x | x |
| Monday | 1/2/2017 | New Year's Day Observed | Open 9am-6pm EST | x | x |
| Monday | 1/16/2017 | Martin Luther King Day | | x | x |
| Monday | 2/20/2017 | President's Day | | x | x |
| Friday | 4/15/2017 | Good Friday | | | x |
| Monday | 5/29/2017 | Memorial Day | x | x | x |
| Monday | 7/3/2017 | Day Before Independence Day | | | Market Closes 1pm EST |
| Tuesday | 7/4/2017 | Independence Day | x | x | x |
| Monday | 9/4/2017 | Labor Day | x | x | x |
| Monday | 10/9/2017 | Columbus Day | | x | |
| Friday | 11/10/2017 | Veteran's Day Observed | | x | |
| Thursday | 11/23/2017 | Thanksgiving Day | x | x | x |
| Friday | 11/24/2017 | Day After Thanksgiving | | | Market Closes 1pm EST |
| Monday | 12/25/2017 | Christmas Day | x | x | x |
| Monday | 1/1/2018 | New Year's Day | Open 9am-6pm EST | x | x |