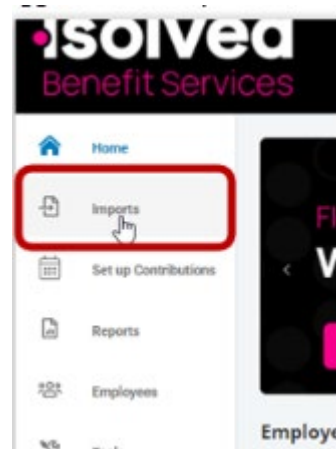
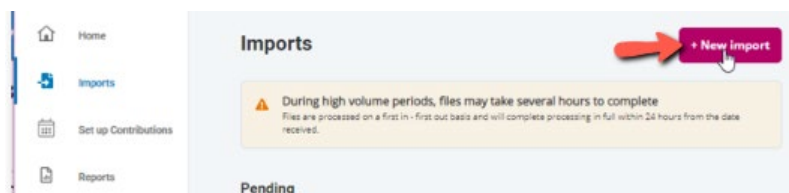


isoloved's one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs). Below you will find the step on how to complete and upload your demographics.

Once you have logged into the portal. Select the **Imports** tab.

Select **+ New Import**, on the top right side of screen.



Select the **Demographics** option and download the corresponding template.

You will see the below columns:

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

- **Column A:** participant social security number (format with no hyphens).
- **Column B, C:** participant last name and first name.
- **Column D:** participant date of birth (MM/DD/YYYY format).
- **Column E, G, H, I, J:** insert participant address.

M	N	O	P	Q	R	S	T
EmailAddress	HomePhone	EmployeeNumber	EmployerEmployeeID	SSN	Division	Class	Payroll

- **Column M:** participant email address (optional).
- **Column Q:** participant social security number (format with no hyphens).
- **Column R, S, T:** these three columns are only required if you have multiple divisions, classes, or payroll frequencies within the company.
- **Column X:** insert participant hire date (MM/DD/YYYY).

Save the spreadsheet. (.xls, .xlsx, .csv)

## Uploading the Spreadsheet via the isoloved Employer Portal

- Go to the **Imports** tab.
- Once again, select New Import > Demographics. Click on **Next** from the Download Template screen.
- Drag and drop your spreadsheet.
- Click on **Import**.