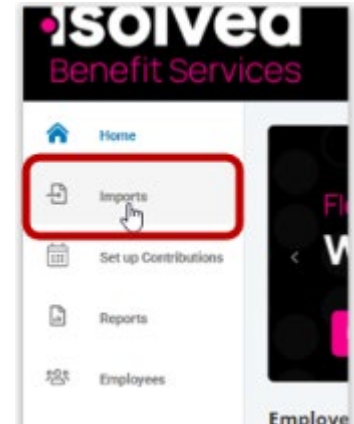
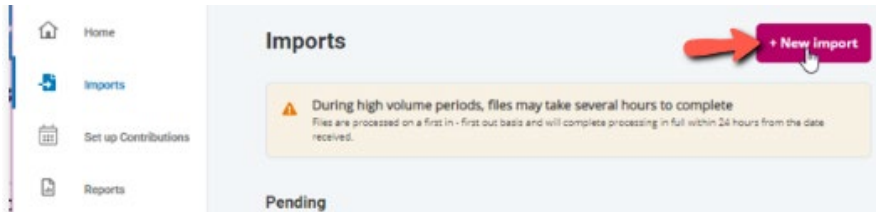


isolved's one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs). Below you will find the steps on completing and uploading enrollments via the Employer Portal.

Once you have logged into the Employer Portal, select the **Imports** tab on the isolved Employer Portal.

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



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

You will see the below columns:

A	B	C	D	E	F	G	H
EmployeeIdentifier	ElectionAmount	PlanName	EnrollmentEffectiveDate	EmployerContribution	EnrollmentTermDate	PrimaryReimbursement	ElectionAmountIndicator

- **Column A:** participant social security number (format with no hyphens).
- **Column B:** insert participant's annual election amount (one line per plan).
- **Column C:** insert plan name as listed on the isolved Employer Portal.
- **Column D:** insert participant's enrollment effective date.
- **Column E:** insert Employer contribution amount (optional).
- **Column G:** insert "debit card" unless debit cards are not offered.
- **Column H:** \*used only for Transportation elections → indicate if the enrollment amount listed is per PlanYear, PerPay, or PerMonth.

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

## Uploading the Spreadsheet via the isolved Employer Portal

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