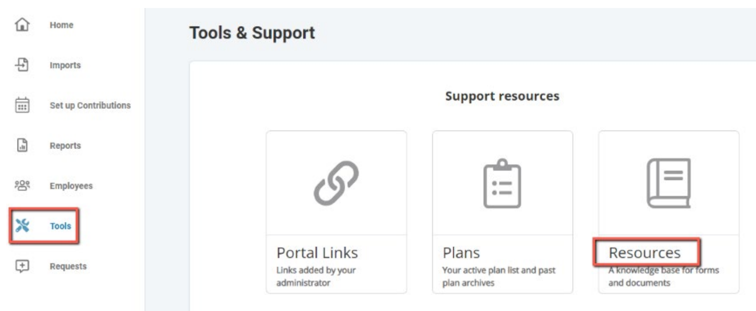
# Submitting Carryover/Takeover Amounts

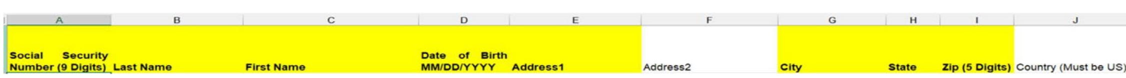
isolved's one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs). Below you will find the step on "How to Submit the Carryover or Takeover Amounts" via the portal.

On the employer portal, under the **TOOLS** tab, you will find the RESOURCES selection.

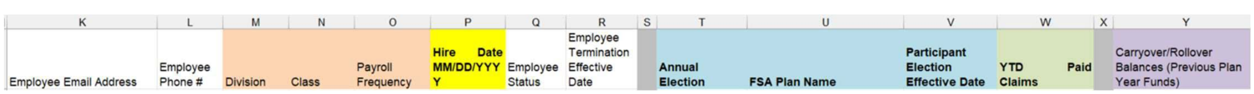



There you will find the Carryover/Takeover Spreadsheet.


Complete the spreadsheet according to the guidelines listed below:




- 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, F, G, H, I J: Insert Participant address




- Column K: Participant email address (optional)
- Column M, N, O: These three columns are only required if you have multiple divisions, classes or payroll frequencies within the company
- Column P: Participant date of hir (MM/DD/YYYY format)
- Column T: Participant's annual election for the takeover plan year
- Column U: Name of the plan (i.e., Health Care Account, Dependent Care)
- Column V: Participant's election effective date for the takeover plan year
- Column W: Amount of Participant's year-to-date paid claims for the takeover plan year
- Column Y: Carryover/rollover amounts from the previous plan year into the takeover plan year

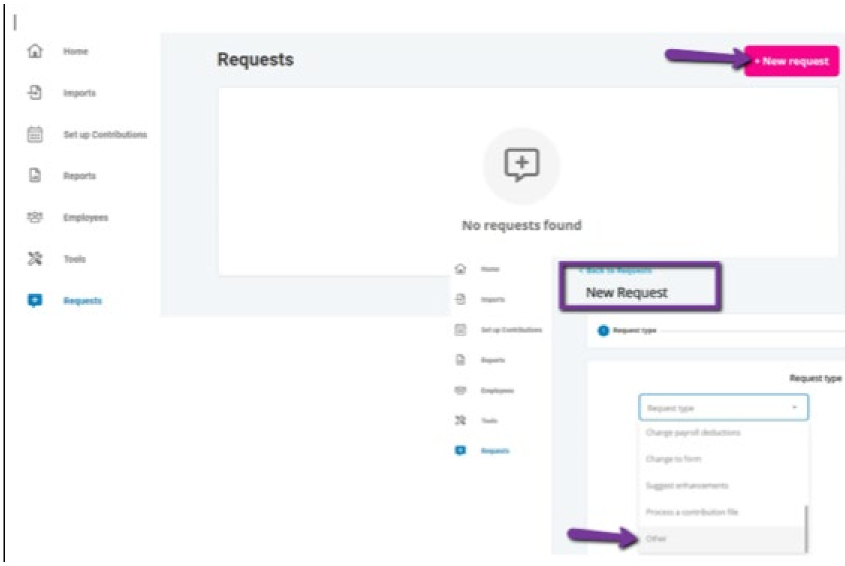
Once the spreadsheet is completed, save the spreadsheet (prior to accessing the portal to upload it).

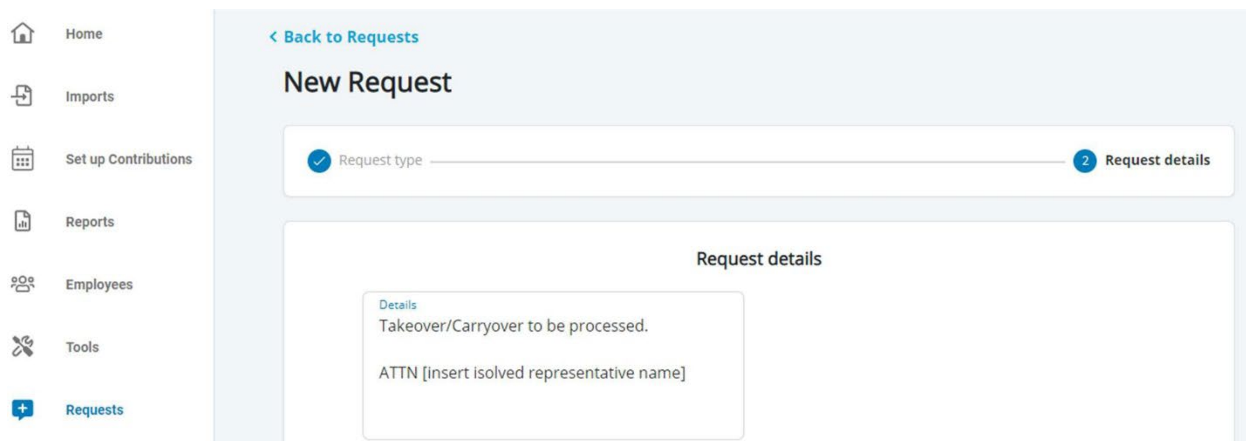
# Submitting Carryover/Takeover Amounts

Once you have it saved, access the employer portal, go to the **Requests** tab, then click on +**New Request.**

From the **Request type** dropdown menu, select **Other** and click Next.

The **Details** section should reflect as shown below:




Click **Submit Request** once the file has been uploaded successfully.