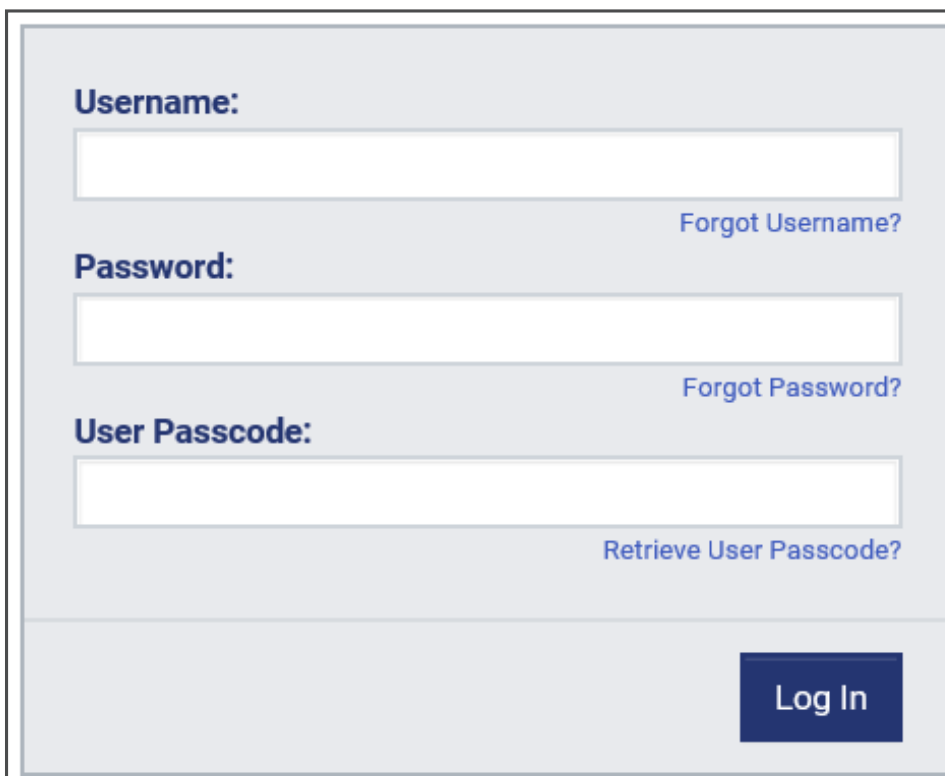


Benefits File Import

Step by Step Guide

1. Go to <https://mercermarketplaceemployer.serviceaccount.com>
2. Log in using your assigned username, password, and passcode.



The screenshot shows a login form with three input fields: Username, Password, and User Passcode. Each field has a corresponding "Forgot" link to its right. A "Log In" button is located at the bottom right of the form.

Username:

[Forgot Username?](#)

Password:

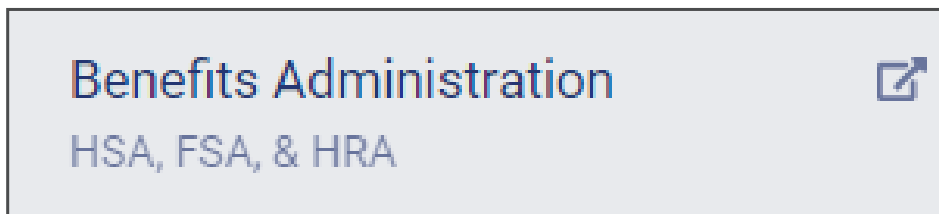
[Forgot Password?](#)

User Passcode:


[Retrieve User Passcode?](#)

Log In

3. Once you're logged in, click **Benefits Administration**.



The screenshot shows a menu item for "Benefits Administration" with a sub-label "HSA, FSA, & HRA" and an external link icon.

Benefits Administration 

HSA, FSA, & HRA

4. From here, click on the Imports tab and select + New import. You will then be directed to the page below. Begin by selecting the file type. Note: The most common file type to import is the Contribution file.

The screenshot shows the 'New import' interface. At the top, there are three progress steps: 1. Import type (active), 2. Download template, and 3. Upload. The main content area is titled 'Import type' and contains the instruction 'Select the template you would like to import.' Below this, there are six cards representing different import types: Address Management, Contribution, Demographic, Demographic/Enrollment, Dependent, and Enrollment. Each card includes a brief description of the import type and a right-pointing arrow.

This screenshot shows the 'Download Contribution template' screen. It includes a progress bar with steps 1. Import type, 2. Download template (active), and 3. Upload. The main content area is titled 'Download Contribution template' and contains the instruction 'Alternatively, you can set up one-time or scheduled contributions by going to the Set up Contributions page.' Below this, there is a checkbox for 'Pre-populate template', a 'Plan year' dropdown menu, and a 'Download template' button. There are also 'Cancel', 'Back', and 'Next' buttons at the bottom.

5. Next, select Download template and click Next. Note: For the Contribution file you'll have the option to click Pre-Populate Template if you want the file to include active employees and plans already in the system.

This screenshot shows the 'Upload Contribution file' screen. It includes a progress bar with steps 1. Import type, 2. Download template, and 3. Upload (active). The main content area is titled 'Upload Contribution file' and contains the instruction 'Certain fields must match information setup by your administrator. If you need help setting up your file, please review the file setup requirements.' Below this, there is a 'View file setup requirements' link, a drag-and-drop area for uploading a .csv, .xls, or .xlsx file, and a 'Show advanced settings' link. There are also 'Cancel', 'Back', and 'Import' buttons at the bottom.

6. Download the file and enter the data into the template. You may need to unprotect the spreadsheet to make edits to the file. Certain fields must match information set up within the system. If the field does not match, the record you're attempting to import will fail. Click View the file setup requirements for more information.

7. Once you've entered the information into the template, select **File and Save As** to name and save it to a location that you can remember.
8. Once you've saved the file, proceed with uploading the file by selecting **Browse**, locating the file, and then clicking **Import**. Do not check the **Synchronize** box.

New Contribution import

Import type Download template **Upload**

Upload Contribution file

Certain fields must match information setup by your administrator. If you need help setting up your file, please review the file setup requirements.

[View file setup requirements](#)

Drag and drop to upload a .csv, .xls, or .xlsx file
or [browse files](#)

Hide advanced settings

Synchronization loads all data within the file, not just changes.
 Synchronize

Cancel Back Import

9. Once you have imported the file, you will be redirected to to watch the file process and view the status. From this queue, you will be able to view and fix errors that may have occurred.

Imports + New import

Warning: During high volume periods, files may take several hours to complete
Files are processed on a first-in - first-out basis and will complete processing in full within 24 hours from the date received.

Pending
Newly added imports awaiting processing will display here

Processing
Processing imports will display here

Completed
Completed imports will display here

It is recommended to always use a file type of Excel Workbook (.xls) when working with your data. The CSV format (.csv) can be used if having difficulty with an Excel format (.xls, .xlsx). However, if you do wish to make changes to the CSV document, there are some formatting steps that may need to be taken to ensure that a leading zero isn't dropped from a value (e.g. '012345'). If you have an existing CSV document, please format the following fields accordingly to avoid formatting discrepancies.

- **Date Fields:** You will not be able to use dashes if using the CSV format. Right click on the entire column. Please select Format Cells, then Custom. In the Type field, you will see 'General'. Please type in eight zeros (00000000) or type in 'MMDDYYYY'. Click OK and the dates will now have the leading zeros.
- **SSN:** Right click on the entire column. Please select Format Cells, then Custom. In the Type field, you will see 'General'. Please type in nine zeros (000000000). Click OK and the SSNs will now have the leading zeros.
- **Zip Codes:** You may also want to custom format your zip codes in the same steps as the SSN with five zeros if any of them have a leading zero.
- **Dollar Amount Fields:** Right click on the entire column and select Format Cells, then select Number. Be sure to have the decimal places set to 2.
- **Saving the File:** When you save the file as a CSV (comma delimited), you will be warned about Excel compatibility issues. You can ignore this warning and select Yes. When you close Excel, you will be asked a second time to save the file. Select No. Your CSV file will now have the stored formatting and is ready for uploading.