



ONGOING ENROLLMENT / CONTRIBUTION PROCESSING AND SPECIAL NOTE ON HSA CONTRIBUTION ERRORS

We previously shared information regarding processing of Open Enrollments, and at that time indicated that we would send additional detail on the new processes for managing ongoing enrollments and deposits to the pre-tax accounts. *You will be receiving credentials for the new Employer Portal in a separate communication.* Below, we address how to use Enrollment Manager and Contribution Manager once you have gained access to the system.

For clients who send files directly from their HRIS or Payroll vendor, this information does not directly apply but may still prove useful in the event you ever need to process enrollment / election changes or salary reductions manually.

For clients who offer an HSA through ThrivePass, please see the last section below for important information on adjusting incorrect contributions.

Enrollment Manager – import demographic and enrollment / election changes

Please review the attached Enrollment Manager Guide and click on this [Enrollment Manager link](#) for a five-minute tutorial on how to use this functionality to quickly and easily upload changes in your participants' demographic information and process new enrollments, terminations, and election changes.

We have also included another copy of the Enrollment Manager Import workbook that we provided with our earlier communication on Open Enrollment processing. Refer to that document for questions that you may have about the required fields and what information / format is necessary in each field (remember to click on the column headers to display the pertinent information). *Please note that you will not be able to import from the spreadsheets within that workbook – because the actual templates are .csv format, you must download a template from within Enrollment Manager on the Employer Portal.*

As a reminder on the Import workbook, we populated both tabs with an example for your reference. You may disregard columns with gray headers (A-C on each tab) because they will not be necessary when you are uploading your own information. Columns with orange headers are either required fields or conditionally required fields that are only required for certain account types or plan setups. *Please pay particular attention to the formatting notes (e.g. birthdates should be YYYYMMDD), and if you are copy/pasting in from another spreadsheet please review the pasted information to verify that the formatting remains intact (e.g. ensure that leading or trailing zeroes on SSN's aren't dropped).*

Contribution Manager – import payroll deduction information

Please review the attached Contribution Manager Guide and click on this [Contribution Manager link](#) for a four-minute tutorial on how to use this functionality to quickly and easily upload participant salary reductions and employer contributions for the pre-tax accounts.

Contribution Manager lets you download a template that is pre-populated with your participants' per-pay-period amounts, make any necessary modifications, and import the file back into the system. It's as easy as that.



SPECIAL NOTE TO ALL CLIENTS WHO OFFER AN HSA THROUGH THRIVEPASS

Regardless of whether you use HRIS/Payroll files or upload contributions through Contribution Manager, PLEASE NOTE that a new process is in place to correct for any mistaken contributions. Our new bank custodian requires a special form that must be signed by the Employer before incorrectly deposited funds can be pulled back out of the individual's HSA. This benefits the participant with an additional level of protection but makes it that much more important that you review any preliminary reporting associated with the HSA's to ensure accuracy before posting the contributions. A copy of the "HSA Employer Contribution Error Form" is attached for reference.