



# Employer FAQ

## Pre-Tax

**Contribution Manager (does not apply if you send files from payroll or HRIS system)**

### How do I create and upload a contribution?

Click on the 3 bar icon ☰ in the upper left-hand side of the screen. Go to **EMPLOYER → Contribution Manager** in the menu. There are 2 methods for creating/uploading contributions:

**Method 1: Direct Entry** – Click on Create Contributions, select the plan and the payroll date and then click Display Contributions. Enter the Employee/Employer Contribution amounts per person and then click Load Contributions. To save these same amounts for future payroll entries, click the button for “Save Employee Payroll Amounts” and “Save Employer Payroll Amounts” if applicable. Repeat for each applicable plan type.

**Method 2: File Import** – Click on Contribution Import and Results, select the plan and the payroll date and then click the “Create Payroll with Active Accounts Only” button. This will produce a CSV file. Enter the applicable Employee/Employer Contribution amounts (formatting to a 0.00 number) and save the spreadsheet. To upload the file, click the “choose file” button in the middle of the page under the Import Contributions heading. Navigate to the file you just saved and click the “process” button. You should see a message in the upper left of the screen indicating that the file loaded successfully. The results will appear in the View Results Area. Repeat for each plan type.

Note that for either method, you can edit contributions for the first day after upload until 4pm CST by looking under **Contribution Manager → Contribution Manager** and scrolling to the “Pending Contributions” drop-down and clicking the blue “Edit” or “Delete” next to the applicable contribution.

### Can I edit a contribution if I made a mistake after I loaded it?

Yes, Contribution Manager allows you to make edits the same day contributions are uploaded until 4 pm CST. Whether you use Method 1 or 2 above, you may edit contributions by going under **EMPLOYER → Contribution Manager → Contribution Manager** and scrolling to the “Pending Contributions” drop-down and clicking the blue “Edit” or “Delete” button by the Contribution that needs to be updated.

### How do I know if a contribution failed?

For Method 1 above, go to **EMPLOYER → Contribution Manager → Contribution Manager** and choose your plan. Click the search button and scroll all the way down to the dropdown for Denied Payroll Deposits to view any denied deposits. For Method 2 above, the View Results area will show “success” or “failed” for each deposit.



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### Contribution Manager Continued

#### What if I'm not seeing my employee's name listed in the name of active members?

There are two likely scenarios if you are missing an employee name when trying to upload contributions:

- A** – the employee has not been added to the system yet through the Enrollment process
- B** – the employee has an HSA that is pending because they have not yet passed the Customer Identification Process (CIP)

Either way, you cannot add a contribution to an account that does not exist.

#### What if my employee that failed CIP never submits the proper documentation needed to fully open his or her HSA?

After 90 days the HSA will be formally closed (although it can be reopened upon request), and you must refund any pre-tax payroll contributions that were deducted from the member's paycheck.

#### Do I need to load contributions for all Plan types?

Contributions must be added through Contribution Manager for HSA plans unless you or your payroll/HRIS vendor submit formal contribution files to our SFTP server. For other plans types, you'll need to know if an auto-post calendar is adding contributions to any of your plans automatically. If your plans use auto-post calendars, then you should not enter contributions (this will cause contributions to be double posted). If your plans do not use calendars to automatically post contributions, you will need to enter contributions via Contribution Manager on at least the Payroll Funded Plans (e.g. Dependent Care and Commuter). You only need to upload contributions for prefunded plans (e.g. Healthcare FSA) if you wanted to track the contributions throughout the year.

#### How do I know if I should use Create Contributions tab or upload contributions through a file?

This is totally up to you. If you have a small number of contributions for any given payroll, then entering the contribution amounts through the Create Contributions tab may be convenient. If you have a larger number of deposits, the File Import method through the Contribution Import & Results Tab will likely be your best option.



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### Contribution Manager Continued

#### Can I pull a report directly from Contribution Manager?

No, Contribution Manager does not have reporting functionality. Employer and Employee totals are provided for each payroll entry. You can take screenshots or if contributions are uploaded through a csv, the detail can be exported from the system.

### Other Items

#### Where do I go to update a member's address?

Navigate to the member's record by using the magnifying glass in the upper left hand corner. You can search using a variety of search methods - Employee ID, Last Name, First Name etc... Enter the search info and then click "Find." Once in the member's record, click on the Demographics Tab (look for the blue lettering across the middle of the screen). Update the address and then click the save button in the bottom left hand corner.

#### How do I add or resend a card for a member?

Once in the member's record (see directions in previous question) click on the Cards tab (again, look for blue lettering). If the member was never sent a card, simply click "new" and then click "save." If the member's card is lost/stolen and you need to reissue a card, put a check mark by the member's name, check the box that says lost/stolen, and then click "save" to reissue a new card. Before issuing a new card, be sure the member's address is up to date.

#### If I receive an email regarding claims or debit card funding what do I need to do?

An ACH debit will pull the funds from your bank account, typically the following day. You need to ensure that the necessary funds are available. For the weekly manual claims check run, back up reporting will be available on Monday. For daily debit card funding, back up reporting will be available as part of month end reporting unless requested otherwise.

#### If my bank account was debited for HSA Funding, what Report do I need to Reconcile these Amounts?

The HSA Funded Contributions Report can be used to reconcile these amounts.