Tompkins HSA Employer Portal Quickstart Guide – Supplemental

Templates

To assist with completing the available templates, we have put together additional information to assist you with this task. Please don't hesitate to contact the Tompkins HSA Department with any questions.

There are two templates available for you to use:

- Contribution - Submit employee payroll deductions or employer contributions
- Demographic/Enrollment - Add and enroll employees in HSA

Import Error Corrections

- Guide to making corrections.
- Please call the HSA Dept. if you need assistance 855-523-8726

Contribution Template

Submit employee payroll deductions or employer contributions

The following fields are required:
- EmployeeIdentifier
- ContributionDate
- ContributionDescription
- ContributionAmount

The following fields are optional:
- PlanName
- PriorTaxYear
- Notes

Fields to Complete

A	B	C	D	E	F	G
EmployeeIdentifier	ContributionDate	ContributionDescription	ContributionAmount	PlanName	PriorTaxYear	Notes
123456789	04142022	Employer	125.36	HSA	Current	Additional Contr

Only one payroll and one employer contribution can be processed per day for each employee. Additional entries will be looked at by the system as if it is a correction of the original entry.

For any month that would need a "0" to make it two digits, use a single quote to retain the "0" in the date. 'MMDDYYY ex: '04142022. You would also need to do this if an SSN or zip code started with a "0."

A. **EmployeeIdentifier: SSN with no dashes**
B. **ContributionDate: use date format MMDDYYYY**
C. **ContributionDesscription: Use either "Employer" for employer contribution**
   " Payroll "for payroll deduction
D. **ContributionAmount: currency format 999999999.99 (No $ sign)**
E. PlanName: use "HSA"
F. PriorTaxYear: use either "Current" or "Prior" (Will default to current year if left blank)
G. Notes (optional – viewable by employee)

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Demographic/Enrollment

Add and enroll employees in HSA

The following fields are required:
- EmployeeIdentifier
- LastName
- FirstName
- DateOfBirth
- AddressLine1
- City
- State
- ZipCode
- EmailAddress
- SSN
- Division (only if using divisions)
- HireDate
- ElectionAmount
- EnrollmentEffectiveDate
- ElectionAmountIndicator
- HDHPCoverageLevel

The following fields are optional:
- Gender
- AddressLine2
- PlanName

Fields to Complete

	A	B	C	D	E	F	G	H	I	J
	EmployeeIdentifier	LastName	FirstName	Gender	DateOfBirth	AddressLine1	AddressLine2	City	State	ZipCode
	123456789	Smith	John		12121990	123S Main St		Ithaca	NY	14850

K	L	M	N	O	P	Q	R	S
Country	Username	Password	EmailAddress	HomePhone	EmployeeNumber	EmployerEmployeeID	SSN	Division
			Jsmith@gmail.com				123456789	

Y	AP	AQ	AR	AS
HireDate	ElectionAmount	PlanName	EnrollmentEffectiveDate	EmployerContribution
03052022	0	Health Savings Account	01012023	

AT	AU	AV	AW
EnrollmentTermDate	PrimaryReimbursement	ElectionAmountIndicator	HDHPCoverageLevel
		Plan Year	Single

*For any month that would need a "0" to make it two digits, use a single quote to retain the "0" in the date. 'MMDDYYY ex: '04142022. You would also need to do this if an SSN or zip code started with a "0."

A. **EmployeeIdentifier: SSN with no dashes**
B. **LastName**
C. **FirstName**
D. Gender (optional): F or M
E. **DateOfBirth: Use date format MMDDYYYY**
F. **AddressLine1**
G. AddressLine2 (optional)
H. **City**
I. **State: Use 2 letter state abbreviation (ex. NY, PA)**
J. **ZipCode**
N. **EmailAddress**

Q. EmployerEmployee ID (optional)
R. **SSN: Social Security Number with no dashes**
S. **Division** (only if using divisions)
Y. **HireDate: Use date format MMDDYYYY**
AP. **ElectionAmount: always use "0"**
AQ. PlanName: use "Health Savings Account"
AR. **EnrollmentEffecitveDate: use date format MMDDYYYY**
AW. **HDHPCoverageLevel: use "Single" or "Family"**

Import Error Corrections

1. Click on "Review" tab

Pending

Demographic Enrollment Template TEST 3.xls
Pending

4/14/2022 11:13 AM

Date received
4/14/2022 11:13 AM

Date processed
Pending

Review

2. Click on "Review & fix"

Completed with errors   Version 1

4/14/2022 11:13:40 AM ⓘ

Part of your file has uploaded successfully, but there were some errors and/or warnings that have occurred. You can ignore these or choose an option below.

Download exception report

Show more

Actions

Resubmit file   **Review & fix**

1. Choose "Fix all"

Enrollment
555555555 (First Last), Health Savings Account Record line 3

[Fix all]

● **Participant file import ID**
ParticipantId with Id 555555555 cannot be found.

● **Election amount indicator**
Election Amount Indicator is a required field when the plan type is HSA.

● **Election amount indicator**
is not a valid value for the Election Amount Indicator field.

● **HDHP coverage level**
HDHP Coverage Level is a required field when the plan type is HSA.

● **Election amount**
Elections cannot be defined for Open Ended HSA Plans. Value on file must be $0.00.

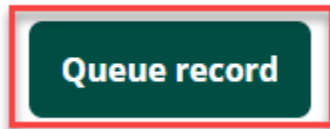Plan name
Health Savings Account

2. Fix identified errors

Election amount
5000.00
Elections cannot be defined for Open Ended HSA Plans. Value on file must be $0.00.

Election amount indicator
[Blank]
Multiple errors on this field. View all errors

HDHP coverage level
[Blank]
HDHP Coverage Level is a required field when the plan type is HSA.
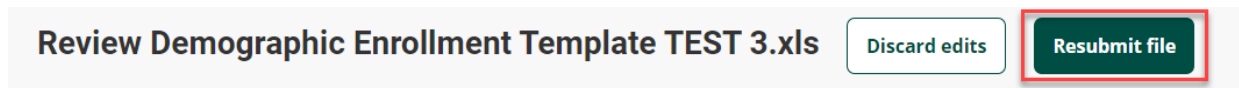
Cancel

Queue record

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3. Select Queue Record

4. Confirm "record has been updated" and "Ready to resubmit"

Enrollment
555555555 (First Last), Health Savings Account   Record line 3

● Record updated
  Ready to resubmit   Edit
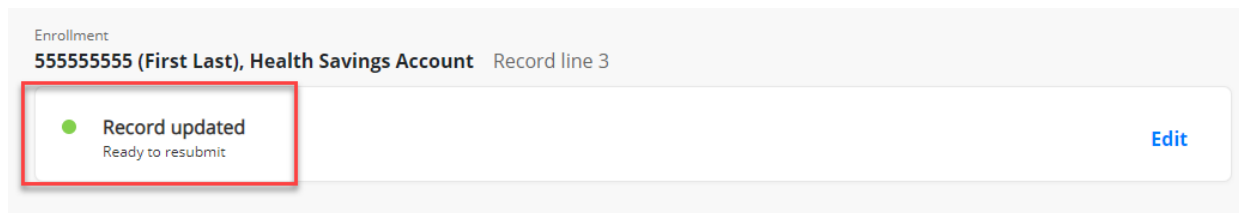
5. Select "Resubmit File" in top left corner.

Review Demographic Enrollment Template TEST 3.xls   Discard edits   **Resubmit file**

Once all errors have been cleared you will get a message that it has been re- uploaded successfully.