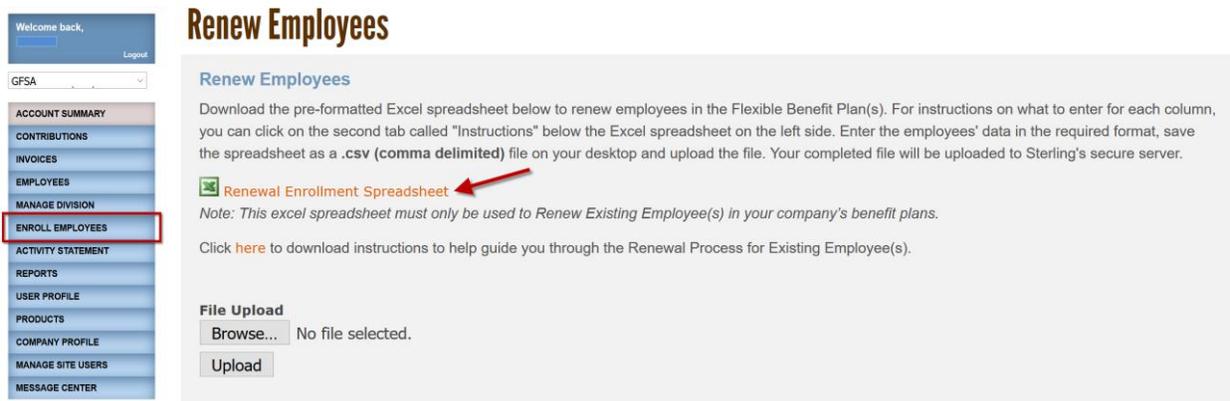




Instructions to Renew Current Employees Online in HRA and FSA Benefit Plan(s)

1. Employer must log in to their account
2. Employer must click on the left menu option: Enroll Employees
3. Under section Renew Employees, click on the Renewal Enrollment Spreadsheet to download the file.



4. Click on the [Renewal Enrollment Spreadsheet](#) to download the file.
 - i. The Excel templates available in the Enroll Employee's area are each intended a specific purpose and may not be used interchangeably. Therefore, to renew your existing employees in your benefit plans, you must use the appropriate template provided.
5. Open the excel spreadsheet after downloading it to review the Prepopulated Existing Employee information and enter the required and any optional information to renew your employee in the desired benefit plan.
 - i. Upon downloading the excel spreadsheet, it will automatically prepopulate your existing employee(s) full name and Sterling Account Number for your convenience.
 - ii. Make sure to enter the employees' data in the required format
 - iii. For Additional instructions on how to enter information on the excel, click on the second tab called "Instructions" below the Excel spreadsheet on the left side.
 - iv. The image below is a sample of the prepopulated information



	A	B	C	D	E	F	G
1	First Name	M.I.	Last Name	Social Security Number	Employee Account Number	Plan Type	Effective Date (mm)
2	Jane	D	Doe		FSAXXXXXX	FSA	
3	John		Doe		FSAXXXXXX	FSA	
4	John		Doe		FSAXXXXXX	PKG	
5							
6							
7							
8							
9							

v. The following is the breakdown of the information and format that is needed for renewal of existing employees.

Prepopulated Information	Required Information	Optional Information
<ul style="list-style-type: none"> • First Name (column A) • Middle Initial (column B) • Last Name (column C) • Sterling Account Number (column E) 	<ul style="list-style-type: none"> • Plan Type (column F) * <ul style="list-style-type: none"> FSA LPF DCA PKG TRN UA1 IIR HRA HR5 HRP <p><i>Ask your client services rep which code applies to your group**</i></p> • Effective Date (column G) <ul style="list-style-type: none"> mm/dd/yyyy <i>(i.e. if date is 01 January 2017 enter 01/01/2017)</i> • Annual Election (column H) <ul style="list-style-type: none"> Numeric digits with up to two decimal places. No commas or dollar signs 	<ul style="list-style-type: none"> • Social Security Number (column D) • Fist Payroll Date (column I) <ul style="list-style-type: none"> mm/dd/yyyy <i>(i.e. if date is 01 January 2017 enter 01/01/2017)</i> • Per-Pay-Period Contribution (column J) <ul style="list-style-type: none"> Numeric digits with up to two decimal places. No commas or dollar signs <i>(i.e. if your contribution is \$2,500 enter 2500)</i> • Number of Pay Periods (column K) <ul style="list-style-type: none"> Whole numbers only; no commas <i>(i.e. for semimonthly enter 24)</i> • Payroll Cycle (column L) <ul style="list-style-type: none"> Semi Annually, Biweekly, Monthly Quarterly, Semimonthly, Weekly • Coverage Tier (column M) <ul style="list-style-type: none"> For HRA plan types only, indicate the participant's tier. Not all tiers will apply to all groups.

* To The plan type that this participant is enrolling in; To renew employees in multiple benefit plans, you must enter the employee information for each Plan Type separately (column F), meaning you must enter a new row with all employee information for each plan to renew (refer to image of excel shown above).

Possible Plan Types: **FSA - Medical FSA, **LPF** - Limited Purpose or Post Deductible, **DCA** - Dependent Care FSA, **PKG** - Parking FSA, **TRN** - Transit FSA, **UA1** - Bicycle FSA, **IIR** - Individual Insurance Premium FSA, **HRA**: **HR5** or **HRP** - Health Reimbursement Account (*Ask your client services rep which code applies to your group*).



- vi. Make sure to save the spreadsheet as a **.csv (comma delimited)** file and for easier access we recommend to save the file on your desktop and upload the file.

- 6. When ready to upload file, click the Browse button to select appropriate file and click the Upload button

Renew Employees

Download the pre-formatted Excel spreadsheet below to renew employees in the Flexible Benefit Plan(s). For instructions on what to enter for each column, you can click on the second tab called "Instructions" below the Excel spreadsheet on the left side. Enter the employees' data in the required format, save the spreadsheet as a **.csv (comma delimited)** file on your desktop and upload the file. Your completed file will be uploaded to Sterling's secure server.

Renewal Enrollment Spreadsheet
Note: This excel spreadsheet must only be used to Renew Existing Employee(s) in your company's benefit plans.

Click [here](#) to download instructions to help guide you through the Renewal Process for Existing Employee(s).

File Upload

No file selected.

- 7. Upon successful upload the File Upload History field will update accordingly.

File Upload History

Upload Number	Date Uploaded	File Name	Upload result	No of Employees
25389	03/30/2017	testGFSAA006572_Renewal_Template.csv	Successfully Loaded 3 employees,	3

- 8. Review the Upload Result to ensure all employee information is loaded successfully.
 - i) To view upload details, click on the Upload Number for more information.

Welcome back, [Logout](#)

GFSAA (FSA)

- ACCOUNT SUMMARY
- CONTRIBUTIONS
- INVOICES
- EMPLOYEES
- MANAGE DIVISION
- ENROLL EMPLOYEES**
- ACTIVITY STATEMENT
- REPORTS
- USER PROFILE
- COMPANY PROFILE
- MANAGE SITE USERS
- MESSAGE CENTER
- PLAN RENEWAL

Enroll Employees

File Upload Results
File Upload Results are listed below

Upload Number: 25389
Batch Number: 660410
Upload Status: Success
Processed Date: 03/30/2017

Employee Name	Account Number	Plan Type	Error Message
Jane Doe	FSAXXXXX	FSA	Successfully Processed
John Doe	FSAXXXXX	FSA	Successfully Processed
John Doe	FSAXXXXX	PKG	Successfully Processed

[Back to Enroll Employees](#)