

How to Enroll Your Employees

A step-by-step guide for employers.



FIFTH THIRD BANK

When you need to enroll your employees in your Fifth Third Health Savings Account, this step-by-step guide makes it easy, covering:

- File preparation: Information you'll need to get started
- Importing your employee information
- Correcting file errors

File preparation: Information you'll need

To enroll an employee, you'll need his or her:

- Full name
- Social Security number
- Date of birth
- Address
- Phone number
- Email
- Date of enrollment
- Your employer user name and password. The employer is assigned a user name and password at the beginning of the process. The employer will be required to update their password at first login – but not their user name.

Importing your employees information:

1. Log in to the Fifth Third HSA Employer Portal. Go to the **IMPORTS** tab. Select **Import Data**.
2. From the **Import Data** page, select **Batch Enrollment**. Then, select **Open Template** and save the template.



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3. Enter your employee data according to the specifications called for in the template. To view formatting requirements, just hover over the column header. If the entered information doesn't follow formatting requirements, the file will fail to import.

Note: Be sure to include the employee's email address so he or she receives an email with their temporary user name and password for first time login.

4. Once you have entered all of your employee enrollment data, you'll need to **save your file**. Then, select **Browse**. Locate the file you just created and select **Import Data**.

5. If your file has been successfully added to the import queue, you will see the confirmation screen to the right.

6. If the file has been successfully processed, there will be no failed records.

Employee's Birth Date (Required)
 Enter the employee's date of birth. Date of birth should be formatted as MMDDYYYY. For example: 07151980 for an employee born on July 15, 1980.

Hover over the column header to view formatting requirements.

Step 4:

Save a copy of the file:

Select File >>> Save As
 Add a File Name
 Select to save the file as .xlsx, .xls, or .csv
 Save the file to a location you can remember
 Select Save

Note:
 If you need to make edits after submitting a file, you should edit the master copy and when completed with your edits, re-save a new file.

* Upload File:

Synchronize
 Locate the file you saved in step 4, containing the data you wish to import.

* Required field

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Import Queue

Import Submitted
 You have successfully added a file to the import queue. Your file will appear in the Pending status below, where you can monitor its progress.
 Data Import Type: Batch Enrollment
 File Name: Fifth Third Mini Batch Mapping Test.xls
 Date Received: 1/24/2020 3:44 PM

Date Received:
 Date Processed:
 File Name: | View All

[Import Data From File](#) [Set Up Contributions](#)

Pending (1 Files)

Date Received	File Name	Status	Failed Records	Actions
1/24/2020 3:44 PM	Fifth Third Mini Batch Mapping Test.xls	Pending	0 of 0	

Completed / Canceled (8 Files)

Date Received	File Name	Status	Failed Records	Actions
1/24/2020 3:44		Completed	0 of 2	

Successfully processed files will have no failed records.

Correcting file errors:

1. If your file does contain failed records, it may not import. Failed records will be indicated, as shown to the right.

The most common reasons for failed records are:

- Information in the Excel file is in the incorrect format
- Information entered was not complete
- Information was copied and pasted into the Excel file using a format that was not compatible with the system

2. To correct errors, select **View Errors**. Select the record with the error by clicking on the underlined number. The error will tell you what needs to be updated. Correct the error and hit **Queue Record**.

3. Continue to fix all errors. If there are many errors, you may want to correct them directly within your Excel file.

4. Once you have finished correcting all of the errors, hit **Resubmit** file. The file will process again with the updated information.

5. If there are numerous errors on the **ENROLLMENT** file, you can correct the errors on the Excel file and resubmit the same file. But you will need to follow the file submission process.

▼	6/25/2019 10:44 AM	Contribution Template Audir 062519.xlsx	Complete	3 of 3	View Errors
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Exception Log: Update Record

One or more errors have occurred for fields in this record

One or more errors have occurred for this record not associated to a specific field. Please view the [Exception Report](#) for more information

View:

RecordType: Enrollment

*ParticipantFilem portID: x
(SSN) Numeric string up to 50 characters
Participantid with Id 21121001 cannot be found.

*PlanName:
Alphanumeric string up to 255 characters

*Required Field | [Cancel](#)

