

## Entering Employer and Payroll Contributions via Employer Portal

When entering contributions through the employer portal you have three options:


1. Import a file each pay period
2. Enter contributions each pay period (skip to page 3)
3. Set up a recurring schedule so the file you designate will automatically import on the selected recurring frequency (skip to page 5)

### Import Each Pay Period:

1. Hover over IMPORTS and click Import Data



2. In the “Data To Import” box select “Contribution” from the dropdown box

\*Data To Import:  

Submit employee payroll deductions or employer contributions.

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Step 1: Open the template in Excel.

You can auto-populate the template with active employees and plans by checking the checkbox below. If you select the auto-populate option, the template will be downloaded in .xlsx format instead of .xls.

☐ Auto-Populate Template

[Open Template](#)

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Step 2: Enter or copy and paste your data into the template.

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Step 3: Certain fields must match information setup by your administrator. If the field does not match the setup data, the record you're attempting to import will fail.

[View Setup Data](#)

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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.

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\* Upload File:

☐ Synchronize

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

| [Cancel](#)

3. For the box “Step 1” there are two options:

- **Option 1:** Click on “Open Template” to populate a blank template which will need the following fields to be completed:
  - EmployeeIdentifier: Unique identifier for an individual, which must be unique within the employee account. Duplicates will be overwritten. This field is not case sensitive.
  - ContributionDate: Format – MMDDYYYY (no slashes or dashes)
  - ContributionDescription: Payroll Deduction and/or Employer Contribution (if posting both employer contribution and payroll deduction they must be two separate lines)
  - ContributionAmount: Specifies the actual dollar amount of the contribution transaction. Decimals are not assumed and must be populated.
  - PlanName: Must match a Plan Name in WEX.
  - **Please note:** Confirm data needed for fields by clicking “View Setup Data” in “Step 3”.
- **Option 2:** Check off “Auto-Populate Template” before clicking “Open Template” to have the following fields pre-populate:
  - EmployeeIdentifier
  - PlanName
    - A drop box to select the applicable plan year will appear – choose the plan year you are adding contributions to
    - All plans that fall under that plan year will appear – check and uncheck accordingly for the plans you are adding contributions for
- **Important:** Do not edit the column headers and/or pre-populated information as well as do not add any fields, columns, and/or rows – this will cause import to fail

A	B	C	D	E
EmployeeIdentifier	ContributionDate	ContributionDescription	ContributionAmount	PlanName
999999999	08032018	Employer	500	HSA Open Ended
999999999	08032018	Payroll	25.50	HSA Open Ended
111111111	08032018	Employer	750	HSA Open Ended
222222222	08032018	Employer	750	HSA Open Ended
222222222	08032018	Payroll	38.56	HSA Open Ended

4. Save the file to your desired location on your computer (save as .xlsx, .xls, or .csv) – do not save the file password protected or it will not load properly
5. In the Upload File box click “Browse”
  - In the new box that opens locate the file you saved from the location chosen in step 6
  - Click Open
  - Leave Synchronize unchecked (it is not applicable to contribution imports)
6. Click “Import Data”
7. Once the file has successfully imported you will receive an email with results – you can also monitor status through the Import Queue (you will automatically be brought here after step 8)

## Enter Each Pay Period:

1. Hover over IMPORTS and click Set Up Contributions



2. On the next page click "Set Up New Schedule"
3. Click on One-Time



4. A drop box to select the applicable plan year will appear – choose the plan year you are adding contributions to
5. Another box will appear where you will choose the date you are posting the contribution for
6. Next you will choose how to enter the contributions:
  - Enter Manually (go to next step)
  - Import a File (skip to step 8)
7. For Enter Manually
  - All plans that fall under that plan year will appear – check and uncheck accordingly for plans you wish to set the recurring contribution schedule for and click Enter Contributions
  - On the next screen everyone enrolled in the plan will appear
  - You will enter each of their contributions (payroll and employer when applicable) – **REMEMBER:** only populate the contributions you wish to have post on this schedule (for example, if you want payroll weekly and employer monthly, two recurring frequencies will need to be set up)
  - Click Save after you've entered everyone's contributions
  - You are now complete, and your recurring schedule has been set up
8. For Import a File
  - Check off Auto-Populate Template
  - All plans that fall under that plan year will appear – check and uncheck accordingly for the plans you wish to set the recurring contribution schedule for
  - Click Download Auto-Populated Template

- Once the spreadsheet opens it will have the following data pre-populated for everyone enrolled in plans you checked off above:
  - EmployeeIdentifier (which is the employee's SSN)
  - Plan Name
- You will need to fill out the following fields (hovering over each column will provide detail on the information needed for that column):
 

**Important:** Do not edit the column headers and/or pre-populated information as well as do not add any fields, columns, and/or rows – this will cause import to fail:

  - ContributionDescription: from the drop down select if it is Employer or Payroll (if you are posting both employer contribution and payroll deduction you must have them as two separate lines)
  - ContributionAmount: enter the amount you want posted for each applicable contribution type (do not use dollar signs)
  - **Leave ContributionDate blank**

A	B	C	D	E
EmployeeIdentifier	ContributionDate	ContributionDescription	ContributionAmount	PlanName
010000002		Employer	10.00	2020 Retiree HRA

- Save the file to your desired location on your computer (save as .xlsx, .xls, or .csv) – do not save the file password protected or it will not load properly
- In the Upload File box click “Browse”
  - In the new box that opens locate the file you saved from the location chosen above
  - Click Open
- Click Save Contributions
- You are now complete, and your contribution will post on the date chosen

## Setting up Recurring Contributions

1. Hover over IMPORTS and click Set Up Contributions



2. On the next page click “Set Up New Schedule”
3. Click on Recurring



### Set Up Contributions

Would you like to set up a one-time contribution or recurring contribution?

☐ One-Time ☐ Recurring

[Cancel](#)

4. A drop box to select the applicable plan year will appear – choose the plan year you are adding contributions to
5. Another box will appear where you will choose the date you want the recurring contribution(s) to start
6. In the next section that appears, select your frequency (bi-weekly 24 frequencies are unable to be setup):
  - a. If you choose Monthly, select one of the options that populates to set the frequency  
Frequency: ☒ Monthly ☐ Weekly  
☐ Day:  of every  month(s)  
☐ The:  day of every  month(s)
  - b. If you choose Weekly, select how many weeks between recurrences (weekly = 1, bi-weekly = 2) and which day of the week it should post on
    - i. **Important:** bi-weekly 24 frequencies are no able to be scheduling on a recurring basis
7. For End on you will choose one of the two options:
  - a. Plan Year End Date which means you will be required to set up a new frequency at the beginning of the next plan year
    - i. Some plan types will display “No End Date” instead which will mean the schedule will not end until you come back and schedule it to
  - b. End By which means you will need to choose a date that the schedule will stop
8. Next you will choose how to enter the contributions:
  - a. Enter Manually (go to next step)
  - b. Import a File (skip to step 10)
9. For Enter Manually

- a. All plans that fall under that plan year will appear – check and uncheck accordingly for plans you wish to set the recurring contribution schedule for and click Enter Contributions
- b. On the next screen everyone enrolled in the plan will appear
- c. You will enter each of their contributions (payroll and employer when applicable) – **REMEMBER:** only populate the contributions you wish to have post on this schedule (for example, if you want payroll weekly and employer monthly, two recurring frequencies will need to be set up)
- d. Click Save after you’ve entered everyone’s contributions
- e. You are now complete, and your recurring schedule has been set up

#### 10. For Import a File

- a. Check off Auto-Populate Template
  - All plans that fall under that plan year will appear – check and uncheck accordingly for the plans you wish to set the recurring contribution schedule for
  - Click Download Auto-Populated Template
  - Once the spreadsheet opens it will have the following data pre-populated for everyone enrolled in plans you checked off above:
    - EmployeeIdentifier (which is the employee’s SSN)
    - Plan Name
  - You will need to fill out the following fields (hovering over each column will provide detail on the information needed for that column):
 

**Important:** Do not edit the column headers and/or pre-populated information as well as do not add any fields, columns, and/or rows – this will cause import to fail:

    - ContributionDescription: from the drop down select if it is Employer or Payroll (if you are posting both employer contribution and payroll deduction you must have them as two separate lines)
    - ContributionAmount: enter the amount you want posted for each applicable contribution type (do not use dollar signs)
    - **Leave ContributionDate blank**

A	B	C	D	E
EmployeeIdentifier	ContributionDate	ContributionDescription	ContributionAmount	PlanName
010000002		Employer	10.00	2020 Retiree HRA

- Save the file to your desired location on your computer (save as .xlsx, .xls, or .csv) – do not save the file password protected or it will not load properly
- In the Upload File box click “Browse”
  - In the new box that opens locate the file you saved from the location chosen above
  - Click Open
- Click Save Contributions
- You are now complete, and your recurring schedule has been set up

#### Maintaining and updating recurring schedule on-going

1. If participants enroll, terminate, or change deduction amounts you will need to update the recurring schedule

2. Going back in to the “Set Up Contributions” section of the Imports drop down you will be able to see the schedules you have created.
3. Click “Update” on the schedule you wish to update. This will open the following screen

Name	Identifier	Payroll Deduction	Employer Contribution
██████████	██████████	\$ 192.31	\$ 0.00
██████████	██████████	\$ 109.62	\$ 0.00
██████████	██████████	\$ 250.00	\$ 0.00

4. Update the applicable participants with the new amounts. If you are removing deductions because they are no longer enrolled and/or terminated, just leave the field blank.