



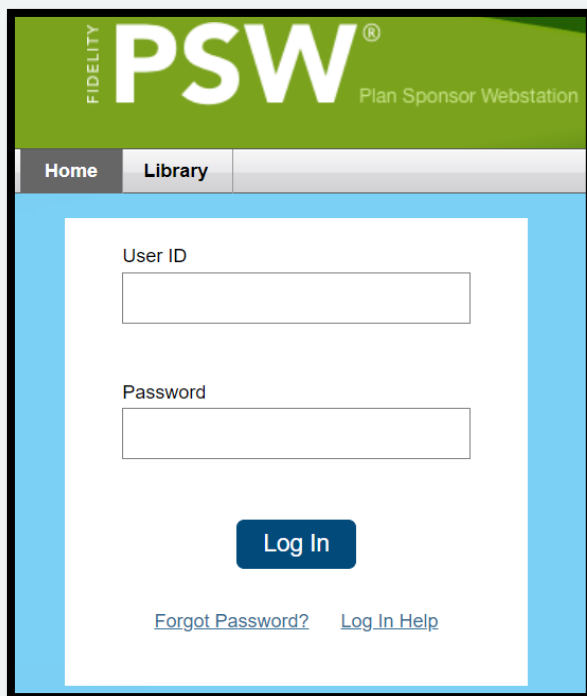
**PSW<sup>®</sup> Guide**  
for submitting  
enrollment/contribution  
files for  
Flexible Spending and  
Reimbursement Accounts

# Step by step Guide to add files in PSW®

Follow Steps 1 through 5 to set-up an enrollment file, contribution file, or participating in commuter eligibility file

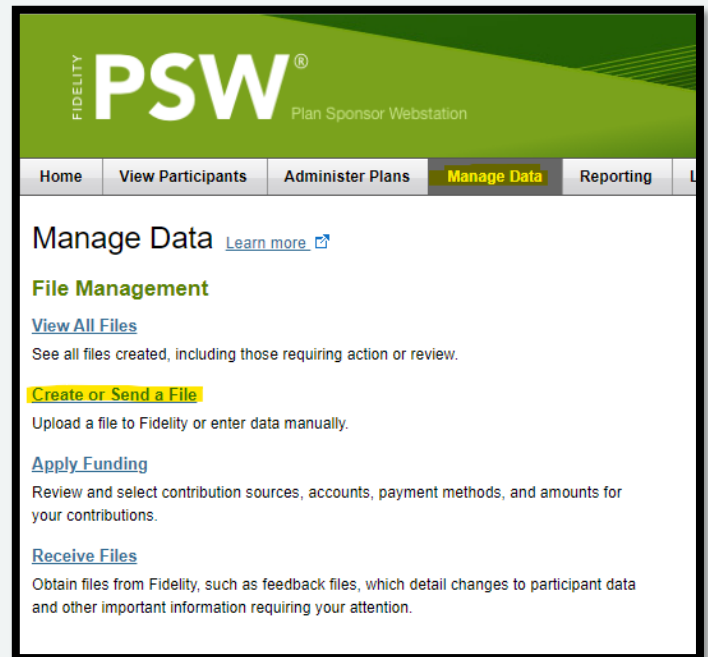
Link: [Welcome to Fidelity Plan Sponsor WebStation](#)

1. Enter your user PSW User ID and Password



The screenshot shows the PSW Plan Sponsor Webstation login page. At the top, there is a green header with the Fidelity PSW logo and the text 'Plan Sponsor Webstation'. Below the header is a navigation bar with 'Home' and 'Library' tabs. The main content area is a white box with a light blue border. It contains two input fields: 'User ID' and 'Password'. Below these fields is a blue 'Log In' button. At the bottom of the white box, there are two links: 'Forgot Password?' and 'Log In Help'.

2. Select “Manage Data” then “Create or Send a file”



The screenshot shows the PSW Plan Sponsor Webstation 'Manage Data' page. At the top, there is a green header with the Fidelity PSW logo and the text 'Plan Sponsor Webstation'. Below the header is a navigation bar with 'Home', 'View Participants', 'Administer Plans', 'Manage Data', and 'Reporting' tabs. The 'Manage Data' tab is selected and highlighted in yellow. Below the navigation bar is the 'Manage Data' section, which includes a 'Learn more' link. Underneath, there is a 'File Management' section with a 'View All Files' link. Below that is a 'Create or Send a File' section, which is highlighted in yellow, with the text 'Upload a file to Fidelity or enter data manually.' Below that is an 'Apply Funding' section with the text 'Review and select contribution sources, accounts, payment methods, and amounts for your contributions.' At the bottom is a 'Receive Files' section with the text 'Obtain files from Fidelity, such as feedback files, which detail changes to participant data and other important information requiring your attention.'

**3. To create a file for upload**

a) From the “File Type” dropdown, select one of the following record types

The screenshot shows the 'Create a New PSW File' form. Under 'Select File Details', there is a 'File Type' dropdown menu with 'Choose One' selected. A link 'What type of file should I select?' is visible to the right.

- RA: Enrollment data
- RA: Contribution data
- Commuter: Eligibility data

b) Always select the “Download Preferred FirstLine template (Windows-compatible Excel file with macros)”

The screenshot shows the 'Create a New PSW File' form. Under 'Select File Details', there is a 'File Type' dropdown menu with 'RA: Enrollment data' selected and an 'HSA program number' dropdown menu with 'Choose One' selected. A link 'What type of file should I select?' is visible to the right. Below the dropdowns, there are two links: 'Download Simple template (Mac and Windows-compatible Excel file without macros)' and 'Download Preferred FirstLine template (Windows-compatible Excel file with macros)'. The second link is highlighted in yellow.

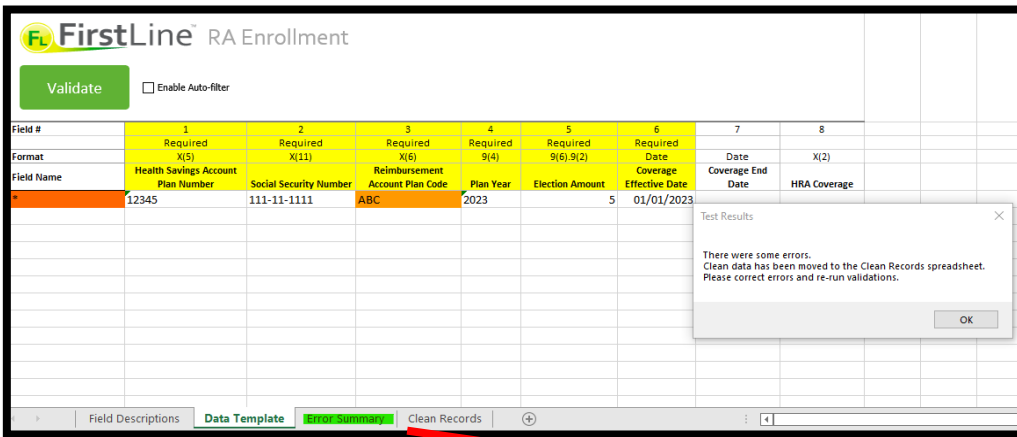
c) Here is an “RA: Enrollment data” example. Fill out the required fields in yellow for the record type chosen; the other fields are optional

The screenshot shows the 'FirstLine RA Enrollment' form. There is a 'Validate' button and an 'Enable Auto-filter' checkbox. Below is a table with 8 columns representing fields. The first three columns (1, 2, 3) are highlighted in yellow, indicating required fields. The table content is as follows:

Field #	1	2	3	4	5	6	7	8
Format	Required X(5)	Required X(11)	Required X(6)	Required 9(4)	Required 9(6),9(2)	Required Date	Date	X(2)
Field Name	Health Savings Account Plan Number	Social Security Number	Reimbursement Account Plan Code	Plan Year	Election Amount	Coverage Effective Date	Coverage End Date	HRA Coverage
	12345	111-11-1111	HCFSA	2023	5	01/01/2023		

d) Select the green **Validate** button

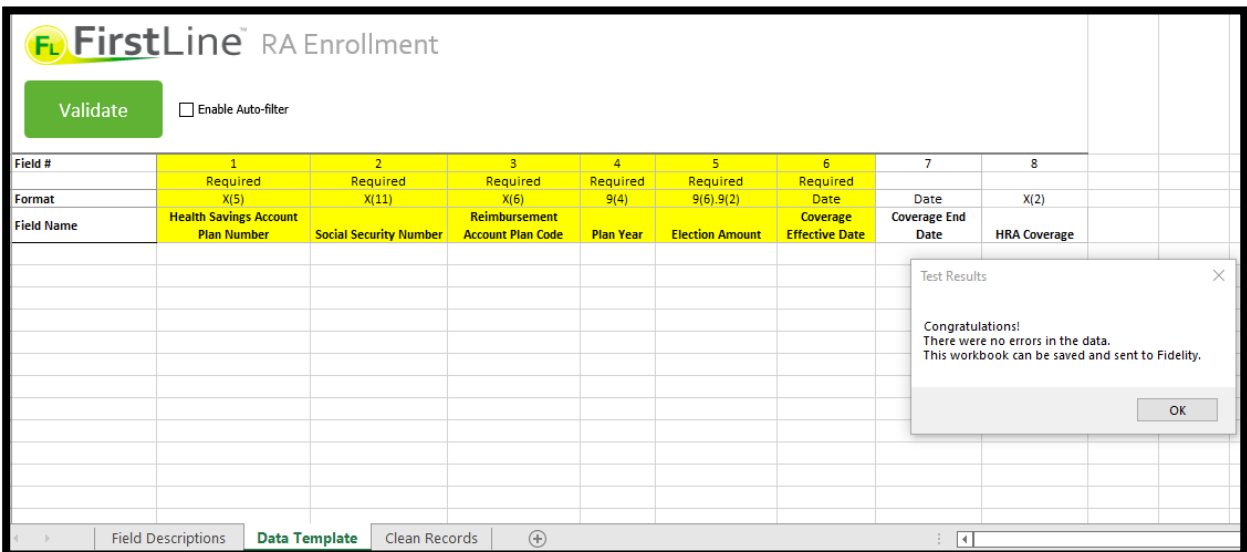
- e) If there are errors, the field with the error will be highlighted in orange. Additional information will be show on the “Error Summary” tab



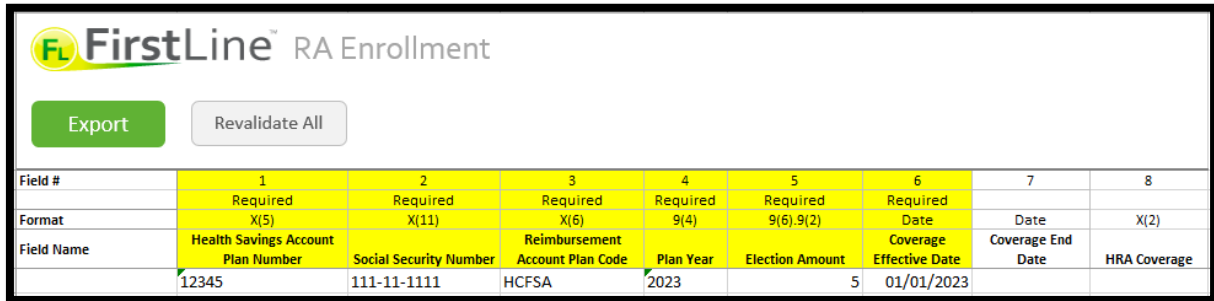
To view the possible errors that may be generated by the report. View the “Error Summary” tab

1	2	3	4
Count	Field Name(s)	Field #	Help Message
1	Reimbursement Account Plan Code	3	Must be one of the allowed plan codes (refer to the Field Descriptions tab).

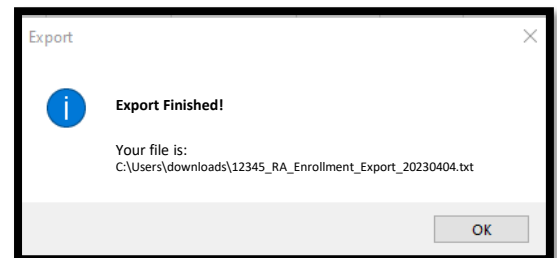
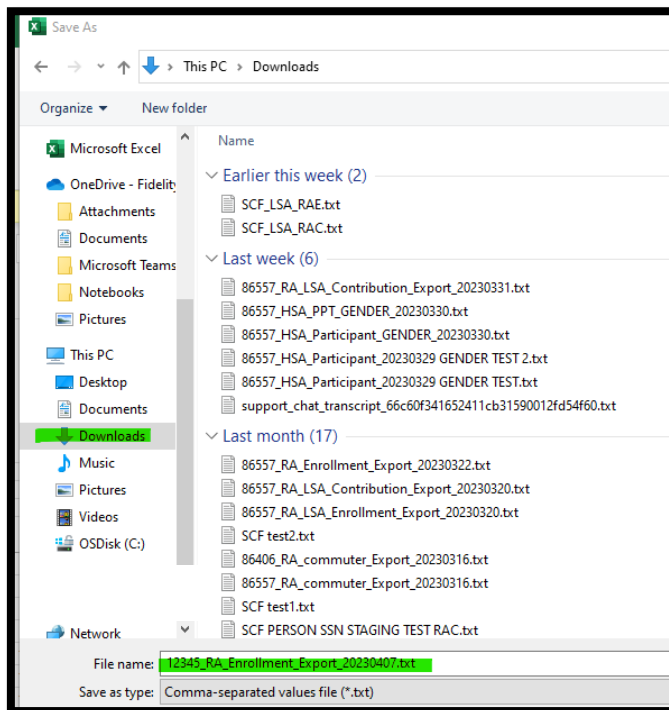
- f) If there are errors, correct all errors and select the green **Validate** button until all information is validated
- g) If there are no errors, you will see a pop-up box saying “Congratulations!”. All valid records will move to the “Clean Records” tab



h) Select the green Export Button



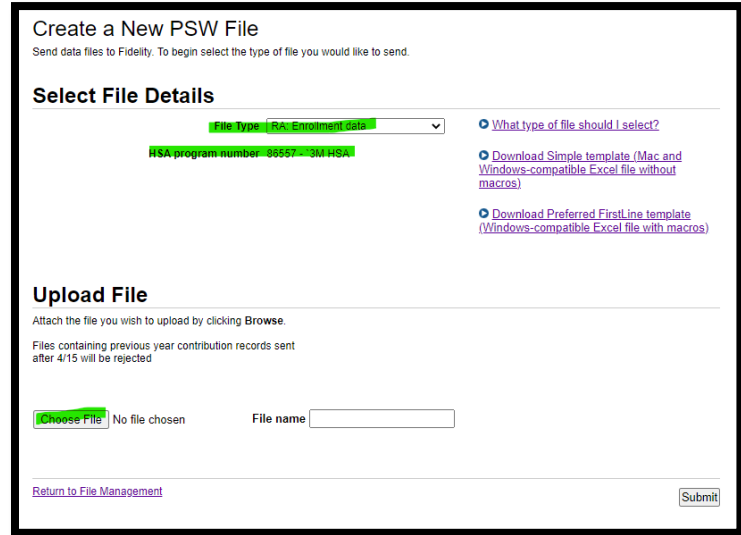
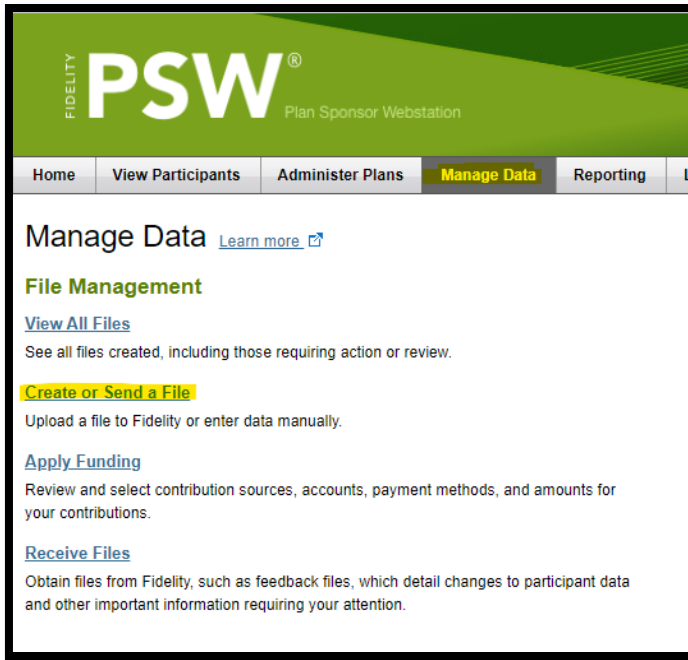
i) Windows Explorer will open. Select where you would like your file to be exported. Below is only an example



#### 4. To upload the file you created

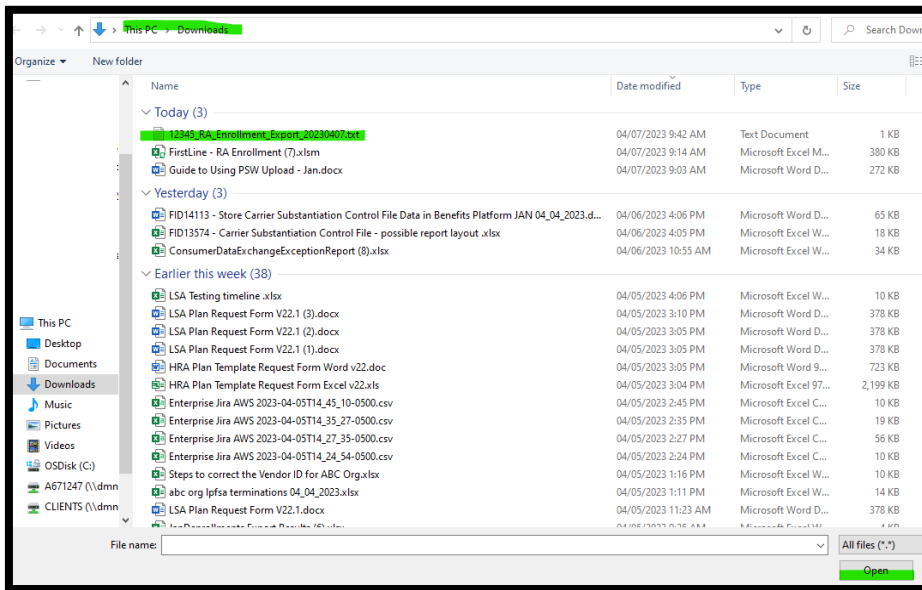
a) Select “Create or Send a File”

b) Select File Type and enter HSA program number

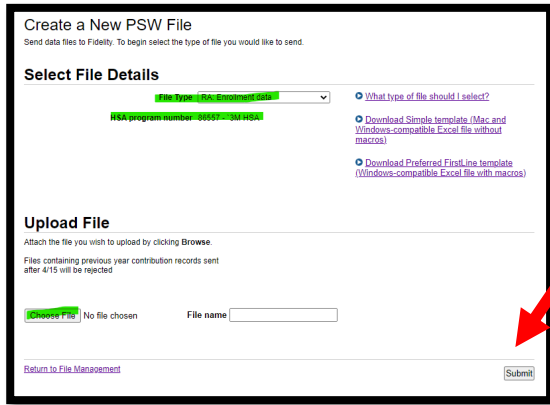


c) The “Upload File” section will appear – select “Choose File”

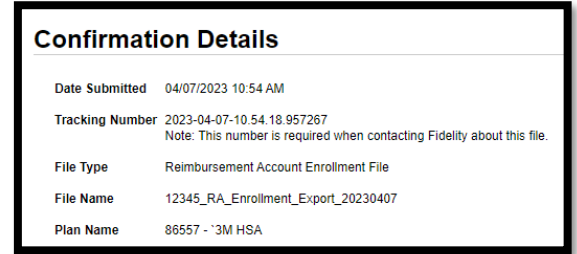
d) Windows Explorer will open – select the file you created for upload (double click or select open)



e) Select the submit button in the lower right of the screen

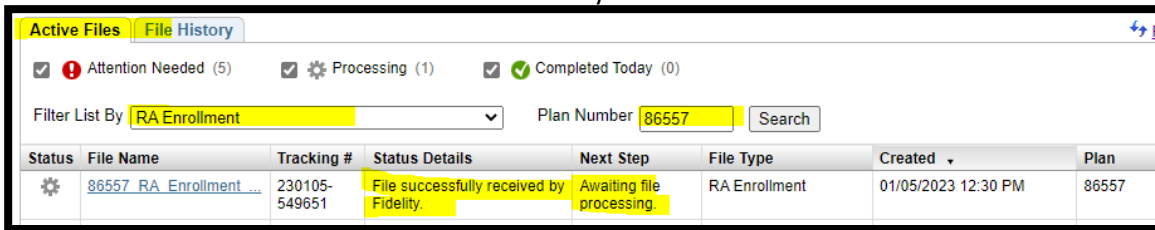


f) Confirmation details will be shown – make a copy in case there are any issues with uploading the file and research is needed



## 5. To view upload file progress

- a) To view file progress, go to **Manage Data** and select “View all files”
  - Recent files that have not finished processing go to the “Active Files” tab
    - File Type, or Participant Errors, can be filtered either in the Active Files tab or File History tab



- Refresh your computer if the process does not appear to be progressing
  - Make sure you are looking at your file date / time
  - Files recently sent that have finished processing review the “File History” tab
    - “Filter List By” either by your File Type or Participant Errors in the Active Files tab or File History tab
- b) If the file errors out, you can correct and resubmit, or delete the file

Screenshots for illustrative purposes only.

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