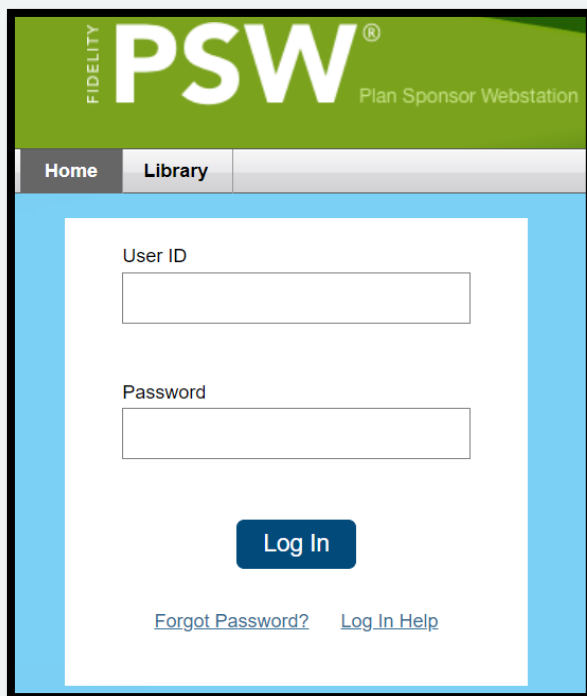# PSW® Guide

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
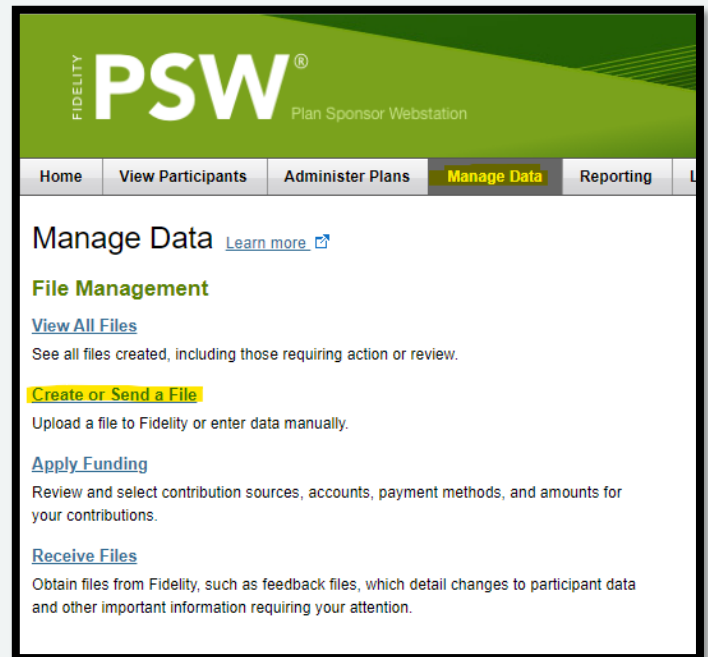
Link: <u>Welcome to Fidelity Plan Sponsor WebStation</u>

1. Enter your user PSW User ID and Password

2. Select "Manage Data" then "Create or Send a file"

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

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

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

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

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

Field #	1	2	3	4	5	6	7	8
	Required	Required	Required	Required	Required	Required		
Format	X(5)	X(11)	X(6)	9(4)	9(6).9(2)	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
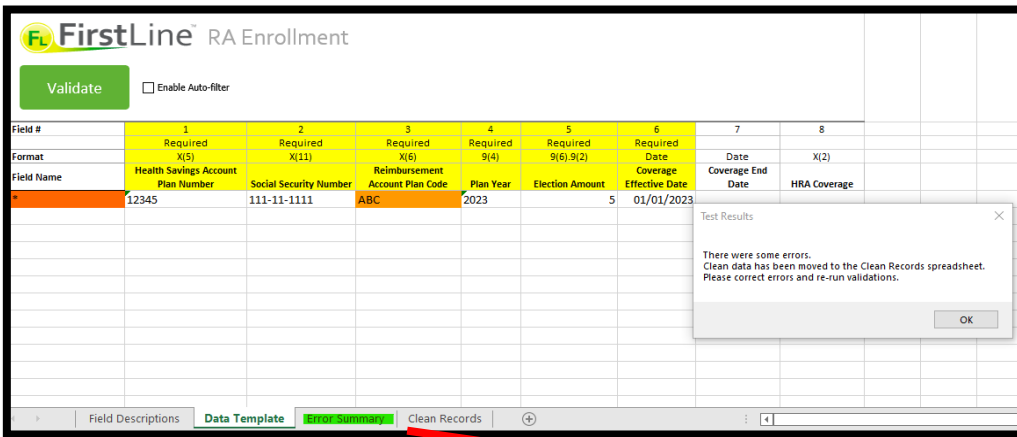
To view the possible errors that may be generated by the report. View the "Error Summary" tab

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
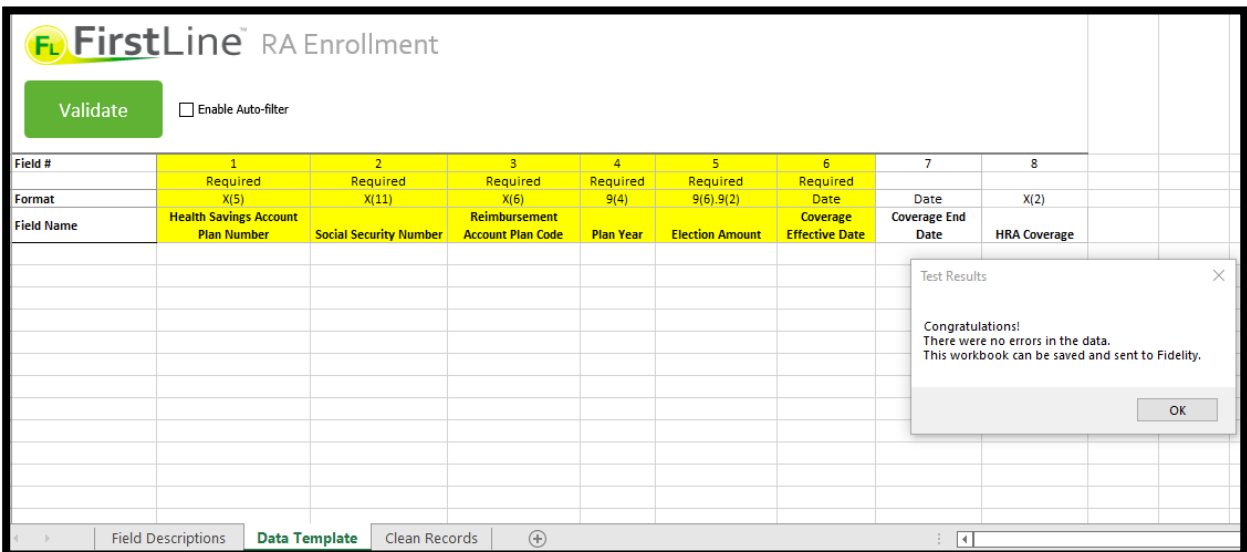
h) Select the green Export Button

FirstLine RA Enrollment

Export	Revalidate All						

| Field #	1	2	3	4	5	6	7	8
	Required	Required	Required	Required	Required	Required		
Format	X(5)	X(11)	X(6)	9(4)	9(6).9(2)	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		

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

Export

ⓘ **Export Finished!**

Your file is:
C:\Users\downloads\12345_RA_Enrollment_Export_20230404.txt
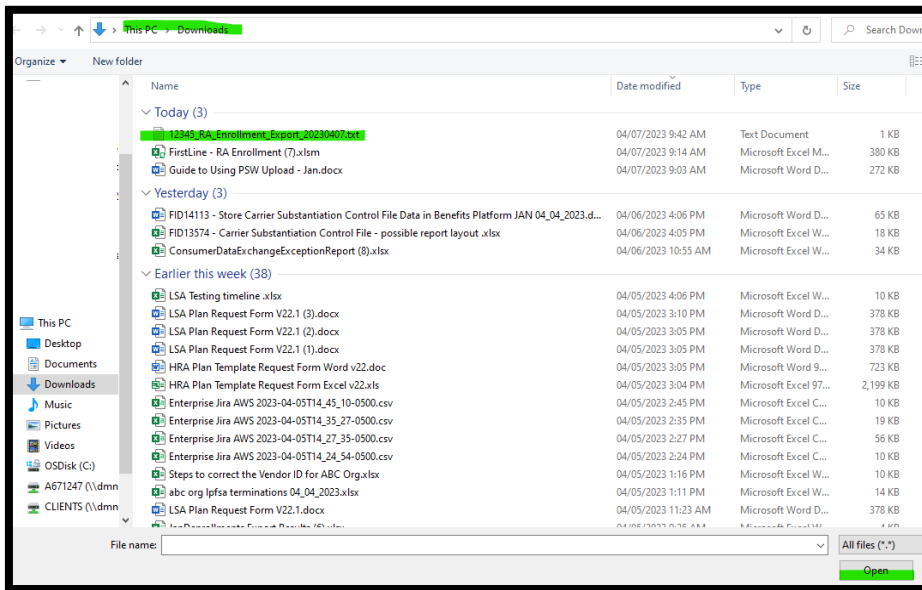
OK
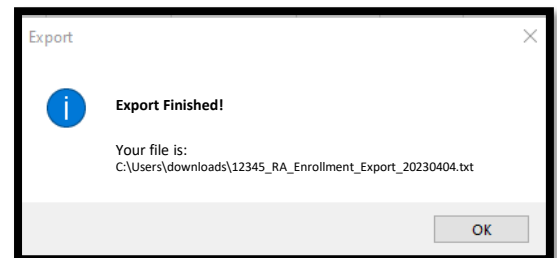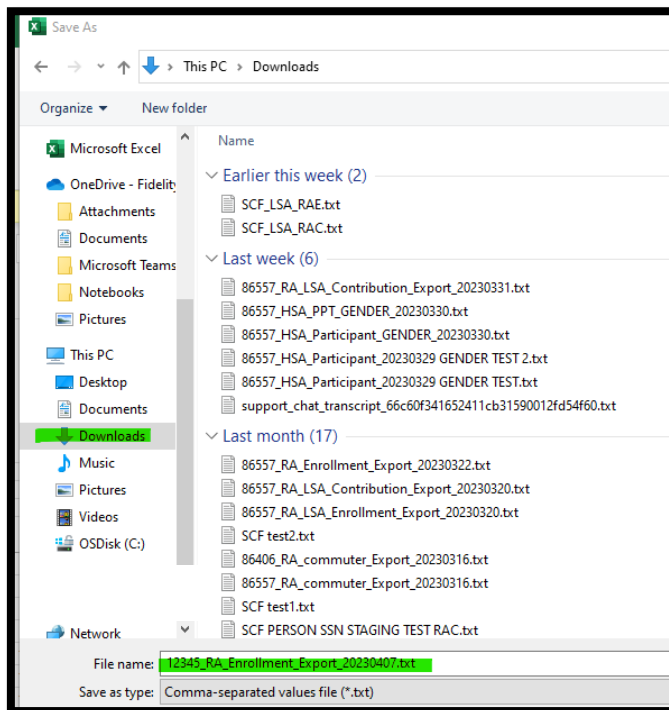
4. To upload the file you created

a) Select "Create or Send a File"

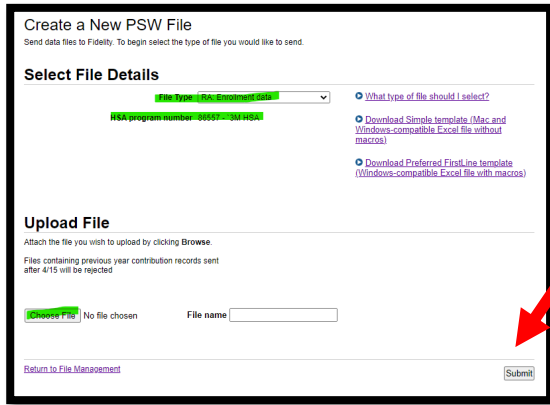b) Select File Type and enter HSA program number
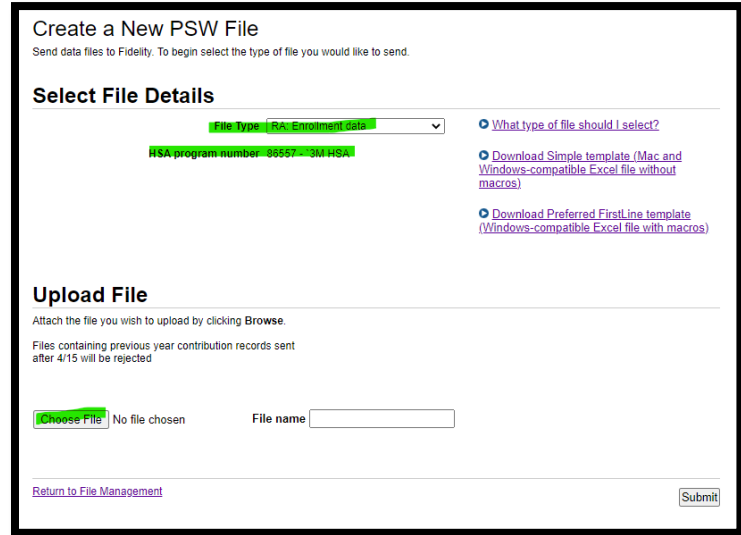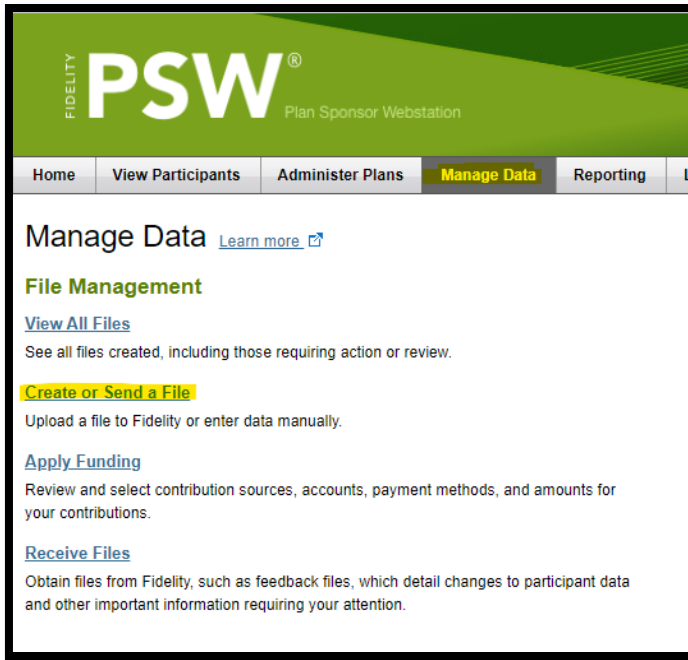
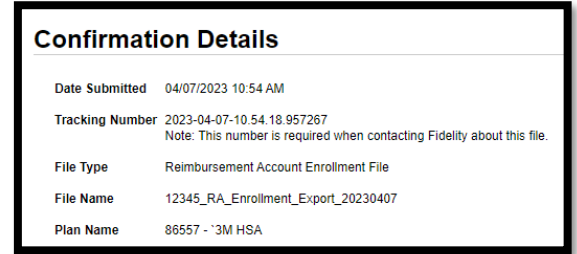c) The "Upload File" section will appear – select "Choose File"

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
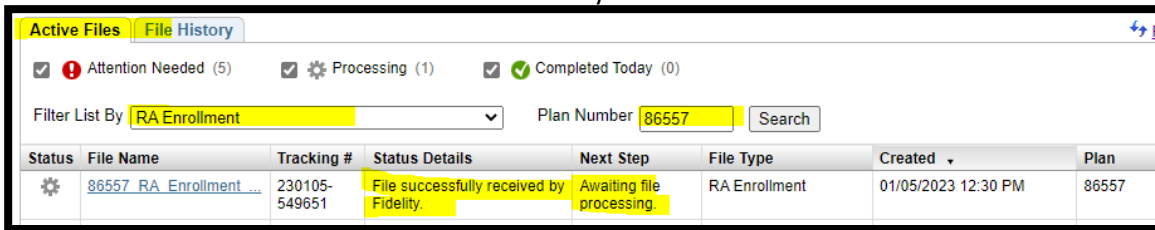
  - ○ Refresh your computer if the process does not appear to be progressing
  - ○ Make sure you are looking at your file date / time
- Files recently sent that have finished processing review the "File History" tab
  - ○ "Filter List By" either by your File Type or Participant Errors in the Active Files tab or File History tab

b) If the file errors out, you can correct and resubmit, or delete the file

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