OVERVIEW, INSTRUCTIONS, & FAQS

BRI Import Wizard

OVERVIEW

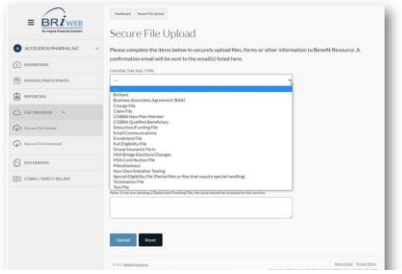
The BRI Import Wizard streamlines BRI's file management processes through BRIWEB and results in the following benefits:

- Streamlined file imports
- Instant feedback regarding format errors
- Reduced wait time
- Faster funding
- Less risk with manual handling
- Improved customer service

INSTRUCTIONS

BRI TIP: Get additional guidance by visiting our website.

STEP 1 Secure File Upload



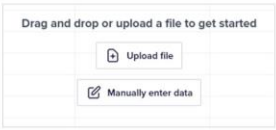
Navigate to *Secure File Upload* on BRIWEB.

BRI will target the following:
- Demographic changes
- Deduction/funding
- Election changes
- New/open enrollment

STEP 2 Upload Your File

Choose a file to upload to the Import Wizard by doing one of the following:

1. Drag & Drop a file
2. Choose *Select file* to open and navigate to your file location using a File Explorer window
3. Manually enter data



STEP 3 Map Incoming Fields with Destination Fields

Review and confirm each mapping choice to map your spreadsheet fields with BRI standardized destination fields.

Updates can made by selecting *X* or the dropdown arrow on the right.

STEP 4 Map Incoming Values with Destination Values

Review and confirm each mapping choice to map your spreadsheet values with BRI standardized destination values.

Updates can made by selecting *X* or the dropdown arrow on the right.

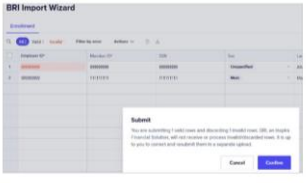
STEP 5 Review & Finalize Error Identifications in BRI Import Wizard

The Import Wizard will highlight records which do not align to BRI's structure or do not pass our validation rules, giving you immediate feedback. Hovering over the highlighted record will give you additional details on how to correct the error.

STEP 6 Review & Finalize Error Correction in BRI Import Wizard

Choose the *Invalid* tab or *Filter by error* option to quickly review and correct data issues. You can also download the file, correct any errors, and start the upload process over.

Once correct, press the *Submit* button, then select the *Confirm* button to complete file uploading and send the data off to BRI. Note that any invalid/discarded rows submitted will not be received or processed by BRI. It is up to you to correct and resubmit them.



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FREQUENTLY ASKED QUESTIONS

WHAT TYPES OF FILES WILL BE IMPORTED USING THE BRI IMPORT WIZARD?

The Import Wizard is available to all clients who use the Secure File Upload functionality to send files to BRI. Deductions, Enrollments, Terminations, Demographics, and Election Changes are enabled.

HOW SHOULD I FORMAT FILES TO ENSURE AN EFFICIENT & SUCCESSFUL UPLOAD?

Formatting your files according to the following standards will ensure the most efficient and successful upload:

- Deduction/Contribution File Standard
- New Enrollment File Standard
- Demographic Changes File Standard
- Election Changes File Standard

HOW DO I USE THE IMPORT WIZARD?

The import wizard will launch automatically from the BRIWEB Employer Portal when you use the Secure File Upload function and upload an eligible file type. Instructions for using the tool can be found in the previous section.

HOW DO I KNOW THAT MY FILE HAS BEEN UPLOADED SUCCESSFULLY?

You will receive a message at the end of the import process stating, *"Success! Upload complete"* which confirms a successful submission. The message will include the number of submitted and discarded rows. After uploading, you will be prompted to enter your email address for a confirmation email.

WHAT ARE THE VALID ACCOUNT TYPES?

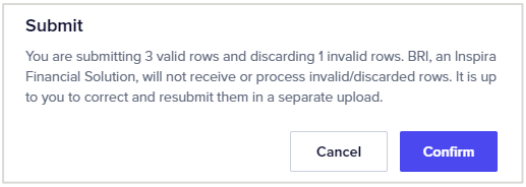
Reach out to your assigned Account Manager if you would like verification of the plan codes that should be used on your files.

WHAT HAPPENS IF I DISCONTINUE AN UPLOAD OR AM INTERRUPTED DURING MY UPLOAD PROCESS?

If you attempt to close the window during the upload process, you will be presented a message that says *"Are you sure you would like to close this window? This will end your current data import session." If* you select the *"Yes, exit"* button, you will need to start the upload process over.

WHAT HAPPENS IF I DISCARD RECORDS WITH ERRORS?

If you select *"Confirm"*, the error records will not be sent to BRI. If those discarded rows contain participant data that needs to be provided to BRI, you should take note of the rows, correct the errors, and re-submit them with another upload.



WHO DO I CONTACT IF I AM HAVING TROUBLE USING THE BRI IMPORT WIZARD?

Reach out to your Account Manager.

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