

# FSA/HSA Contribution File Data Import

Clients using our Employer Portal to import contribution files must use one of the following templates to compile their payroll data for upload to Sentinel each pay period.

## File Templates

The Standard Contribution File should be used for plans that offer only FSA and Commuter benefits through Sentinel:

[standard-contribution-file-template-sample.xlsx](#) 

The HSA Contribution File should be used for plans that offer HSA only or HSA and FSA/Commuter benefits through Sentinel:

[hsa-contribution-file-template-sample.xlsx](#) 

## File Formatting

Each of the templates linked above include 5 required fields that should be formatted as follows:

- **Employee Identifier:** 9-digit SSN with no spaces or dashes. Field should be formatted as Text so that leading zeroes remain in the number.
- **Contribution Date:** Must be formatted MMDDYYYY with no slashes or dashes. Field should be formatted as Text so that leading zeroes remain in the number. Date should correspond with a scheduled paycheck date.
- **Contribution Description:** Select Payroll or Employer depending on the contribution type. Should be formatted as Text.
- **Contribution Amount:** Amount of payroll deduction formatted as Number.
- **Plan Name:** Use one of the plan names listed below. The plan name must match one of these exactly. The year indicated in the plan name should match the year in which the current plan year began.
  - Medical FSA 2024
  - Dependent FSA 2024
  - Limited Purpose FSA 2024
  - Transit FSA 2024
  - Parking FSA 2024
  - Transit Post Tax 2024
  - Parking Post Tax 2024
  - HSA Plan
- **PriorTaxYear:** This field is not required and only applies to HSA contributions. The field only needs to be completed to show "Prior" if you are uploading a payroll file in January that includes a HSA deduction which was withheld in the prior year. If left blank, the contribution will default to current tax year.

## File Upload

1. Log into the Employer Portal and select "Reimbursement Accounts"
2. Select "Imports" from the menu on the left side of the screen.
3. Click the "+ New Import" button in the top right.
4. Select "Contribution" and click "Next" on the following Download Template screen.
5. Click Browse to find your file or drag and drop your file.
6. Once your file is selected, press the "Import" button.
7. You will receive a message that the file has been successfully uploaded and Sentinel will contact you if there are any issues that need to be addressed.

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