



BRI Import Wizard

OVERVIEW

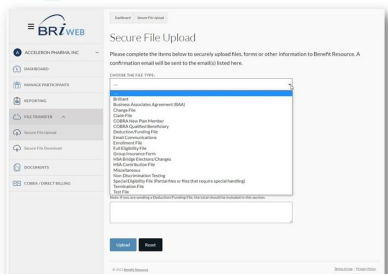
The BRI import wizard is a result of feedback we've received from our clients. It streamlines BRI's file management processes and results in the following benefits:

- Streamline file imports
- Instant feedback regarding format errors
- Reduce wait time
- Faster funding
- Less risk with manual handling
- Improve customer service

INSTRUCTIONS

BRI TIP: Get additional guidance by watching our [OVERVIEW VIDEO](#) ▶

STEP 1 Secure File Upload



Navigate to [Secure File Upload](#) on BRIWEB

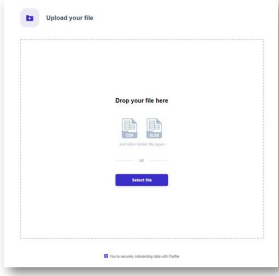
BRI will target the following:

- Demographic changes
- Deduction/funding
- Election changes
- New/open enrollment
- Termination

STEP 2 Upload Your File

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

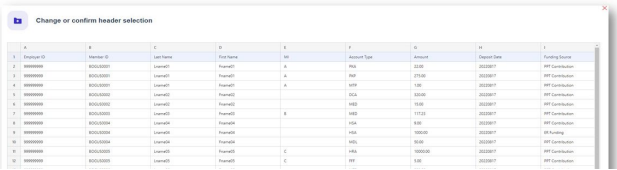
1. Drag & Drop a file
2. Choose [Select file](#) to open and navigate to your file location using a File Explorer window



STEP 3 Change or Confirm Header Selection

Tell the Import Wizard where the header row is.

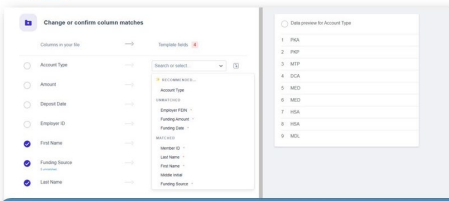
NOTE: This will generally be the first row of the file.



STEP 4 Change or Confirm Column Matches

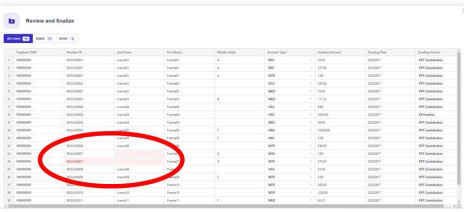
Map your data to BRI's file layout.

After the initial mapping, the Import Wizard will remember how your data is organized.



The Import Wizard helps you get your data into the right format. The platform learns over time how data should be organized. Data fields are inferred from your file and smart matched automatically.

STEP 5 Review & Finalize Error Identifications

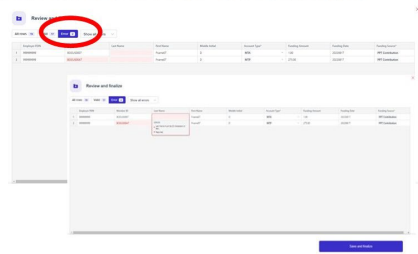


The Import Wizard will highlight records which do not align to BRI's structure or do not pass our validation rules, giving you immediate feedback.

No more waiting for BRI!

The Import Wizard highlights data that does not conform to BRI's structure or follow our validation rules.

STEP 6 Review & Finalize Error Correction



Choose the error tab to quickly review and correct data issues.

An Error Message will be provided to let you know how to resolve the error. Once correct press the [Save and finalize](#) button to send the data off to BRI.

With real-time feedback, clients can correct data on the fly.



BRI Import Wizard

FREQUENTLY ASKED QUESTIONS

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

The Import Wizard is available to all clients who use the Secure File Upload functionality to send files to BRI. Deduction and Enrollment files, Termination notices, and Demographic and Election Changes will be enabled initially with more file types added in the future. Updates will be shared via email the notices bar in BRIWEB.

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
- Employment Terminations File Standard
- Demographic Changes File Standard
- Election Changes File Standard

HOW DO I USE THE NEW IMPORT WIZARD?

The new 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, *"You have imported # records!"* The screen will include a count of the number or records submitted, imported, and rejected. This screen indicates that you have uploaded your file successfully.

WHAT ARE THE VALID ACCOUNT TYPES?

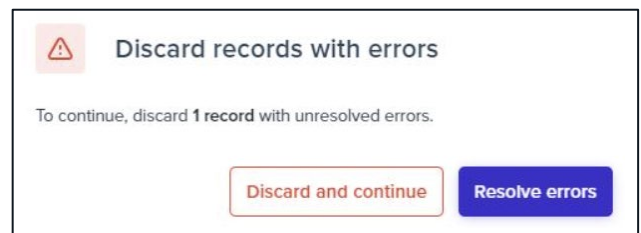
Download our list of valid account types: [Account Type Abbreviations](#)

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

The import wizard records where you left off. When you re-enter the wizard, it will prompt you to *"Pick up where you left off"* or *"Start over"*.

WHAT HAPPENS IF I DISCARD RECORDS WITH ERRORS?

If your upload contains errors and you proceed with the import, you will be presented with the message seen to the right. If you select *"Discard and continue"*, 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 NEW BRI IMPORT WIZARD?

If there is something we haven't covered in the BRI Import Wizard Hub, please don't hesitate to reach out to your Client Service Specialist! We are here to help make this transition as smooth as possible.