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# Secure File Upload

The screenshot shows the BRIWEB interface for Secure File Upload. The left sidebar contains navigation options: ACCELERON PHARMA, INC., DASHBOARD, MANAGE PARTICIPANTS, REPORTING, FILE TRANSFER (with a sub-menu for Secure File Upload and Secure File Download), DOCUMENTS, and COBRA / DIRECT BILLING. The main content area is titled 'Secure File Upload' and includes a breadcrumb trail 'Dashboard > Secure File Upload'. Below the title is a paragraph: 'Please complete the items below to securely upload files, forms or other information to Benefit Resource. A confirmation email will be sent to the email(s) listed here.' A dropdown menu labeled 'CHOOSE THE FILE TYPE:' is open, showing a list of file types: Brilliant, Business Associates Agreement (BAA), Change File, Claim File, COBRA New Plan Member, COBRA Qualified Beneficiary, Deduction/Funding File, Email Communications, Enrollment File, Full Eligibility File, Group Insurance Form, HSA Bridge Elections/Changes, HSA Contribution File, Miscellaneous, Non-Discrimination Testing, Special Eligibility File (Partial files or files that require special handling), Termination File, and Test File. Below the dropdown is a text input field with a note: 'Note: if you are sending a Deduction/Funding File, the total should be included in this section.' At the bottom of the form are 'Upload' and 'Reset' buttons. The footer contains copyright information for Benefit Resource and links to Terms of Use and Privacy Policy.

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

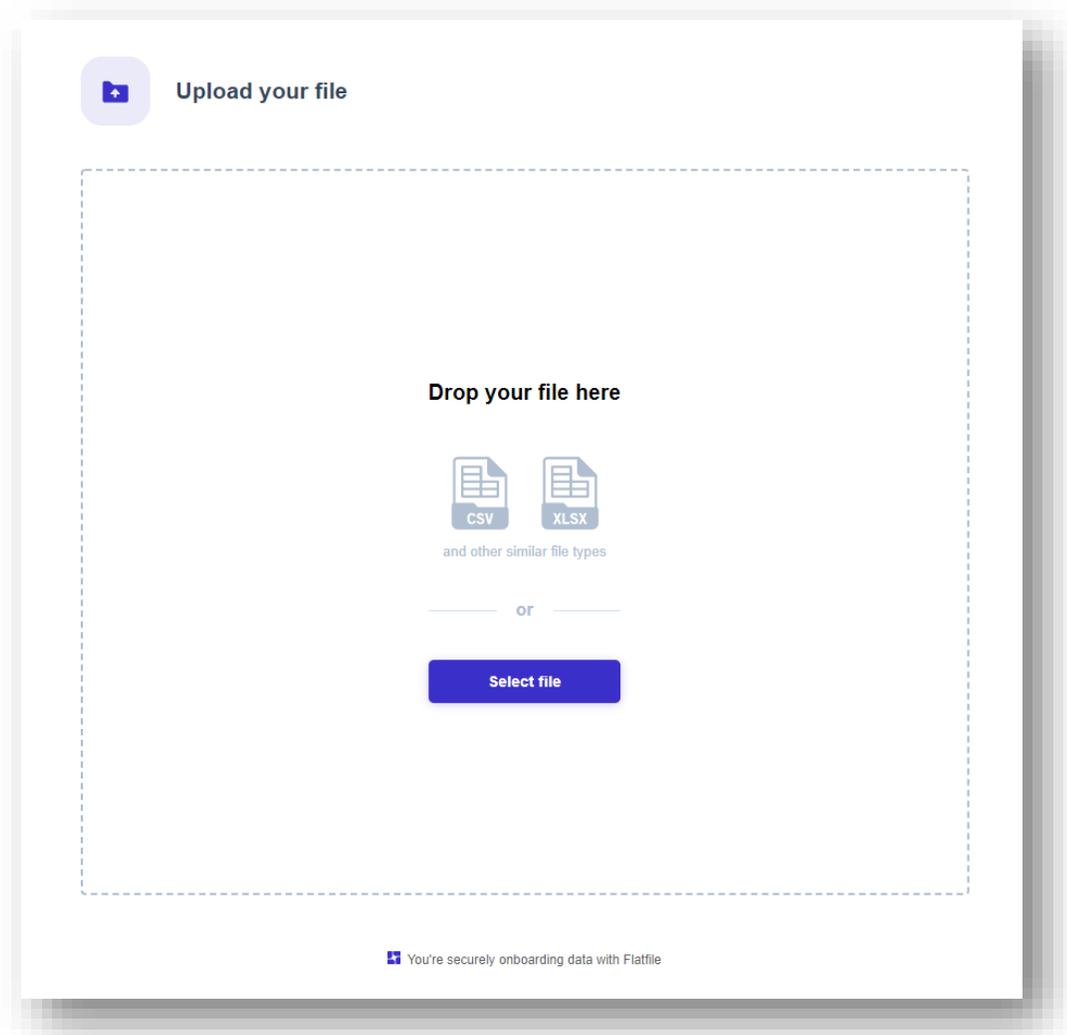
- BRI will target the following:
- Demographic changes
  - Deduction/funding
  - Election changes
  - New/open enrollment
  - Termination

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# 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





# 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.*

 **Change or confirm header selection**

	A	B	C	D	E	F	G	H	I
1	Employer ID	Member ID	Last Name	First Name	MI	Account Type	Amount	Deposit Date	Funding Source
2	999999999	BOGUS0001	Lname01	Fname01	A	PKA	22.00	20220817	PPT Contribution
3	999999999	BOGUS0001	Lname01	Fname01	A	PKP	275.00	20220817	PPT Contribution
4	999999999	BOGUS0001	Lname01	Fname01	A	MTP	1.00	20220817	PPT Contribution
5	999999999	BOGUS0002	Lname02	Fname02		DCA	320.00	20220817	PPT Contribution
6	999999999	BOGUS0002	Lname02	Fname02		MED	15.00	20220817	PPT Contribution
7	999999999	BOGUS0003	Lname03	Fname03	B	MED	117.23	20220817	PPT Contribution
8	999999999	BOGUS0004	Lname04	Fname04		HSA	9.00	20220817	PPT Contribution
9	999999999	BOGUS0004	Lname04	Fname04		HSA	1000.00	20220817	ER Funding
10	999999999	BOGUS0004	Lname04	Fname04		MDL	50.00	20220817	PPT Contribution
11	999999999	BOGUS0005	Lname05	Fname05	C	HRA	10000.00	20220817	PPT Contribution
12	999999999	BOGUS0005	Lname05	Fname05	C	FFF	5.00	20220817	PPT Contribution
13	999999999	BOGUS0006	Lname06	Fname06		MTP	930.00	20220817	PPT Contribution

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# Change or Confirm Column Matches

**Change or confirm column matches**

Columns in your file → Template fields **4**

- Account Type →
- Amount →
- Deposit Date →
- Employer ID →
- First Name →
- Funding Source → 0 unmatched
- Last Name →

Search or select... [v] [x]

**RECOMMENDED...**

- Account Type

**UNMATCHED**

- Employer FEIN \*
- Funding Amount \*
- Funding Date \*

**MATCHED**

- Member ID \*
- Last Name \*
- First Name \*
- Middle Initial
- Funding Source \*

**Data preview for Account Type**

1	PKA
2	PKP
3	MTP
4	DCA
5	MED
6	MED
7	HSA
8	HSA
9	MDL

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.

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# Review & Finalize Error Identifications

Review and finalize

All rows 19 Valid 17 Error 2

	Employer FEIN	Member ID	Last Name	First Name	Middle Initial	Account Type*	Funding Amount	Funding Date	Funding Source*
1	999999999	BOGUS0001	Lname01	Fname01	A	PKA	22.00	20220817	PPT Contribution
2	999999999	BOGUS0001	Lname01	Fname01	A	PKP	275.00	20220817	PPT Contribution
3	999999999	BOGUS0001	Lname01	Fname01	A	MTP	1.00	20220817	PPT Contribution
4	999999999	BOGUS0002	Lname02	Fname02		DCA	320.00	20220817	PPT Contribution
5	999999999	BOGUS0002	Lname02	Fname02		MED	15.00	20220817	PPT Contribution
6	999999999	BOGUS0003	Lname03	Fname03	B	MED	117.23	20220817	PPT Contribution
7	999999999	BOGUS0004	Lname04	Fname04		HSA	9.00	20220817	PPT Contribution
8	999999999	BOGUS0004	Lname04	Fname04		HSA	1000.00	20220817	ER Fundina
9	999999999	BOGUS0004	Lname04	Fname04		MDL	50.00	20220817	PPT Contribution
10	999999999	BOGUS0005	Lname05	Fname05	C	HRA	10000.00	20220817	PPT Contribution
11	999999999	BOGUS0005	Lname05	Fname05	C	SRA	5.00	20220817	PPT Contribution
12	999999999	BOGUS0006	Lname06	Fname06		MTP	930.00	20220817	PPT Contribution
13	999999999	BOGUS0007	Lname07	Fname07	D	MTA	1.00	20220817	PPT Contribution
14	999999999	BOGUS00A7	Lname07	Fname07	D	MTP	275.00	20220817	PPT Contribution
15	999999999	BOGUS0008	Lname08	Fname08		HSA	55.00	20220817	PPT Contribution
16	999999999	BOGUS0009	Lname09	Fname09	E	MTP	5.00	20220817	PPT Contribution
17	999999999	BOGUS0010	Lname10	Fname10		MTP	200.00	20220817	PPT Contribution
18	999999999	BOGUS0010	Lname10	Fname10		MTP	-200.00	20220817	PPT Contribution
19	999999999	BOGUS0011	Lname11	Fname11	F	MED	63.22	20220817	PPT Contribution

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.

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# 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.

The screenshot displays a data review interface. At the top, a tab labeled 'Error 2' is highlighted with a red circle. Below the tabs is a table with columns: Employer FEIN, Member ID, Last Name, First Name, Middle Initial, Account Type\*, Funding Amount, Funding Date, and Funding Source\*. The table contains two rows of data. Below the table, a modal window titled 'Review and finalize' is open, showing a similar table with a red box highlighting an error message. At the bottom right of the modal, there is a blue button labeled 'Save and finalize'.

	Employer FEIN	Member ID	Last Name	First Name	Middle Initial	Account Type*	Funding Amount	Funding Date	Funding Source*
1	999999999	B0GUS0007		Fname07	D	MTA	1.00	20220817	PPT Contribution
2	999999999	B0GUS00A7		Fname07	D	MTP	275.00	20220817	PPT Contribution

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