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
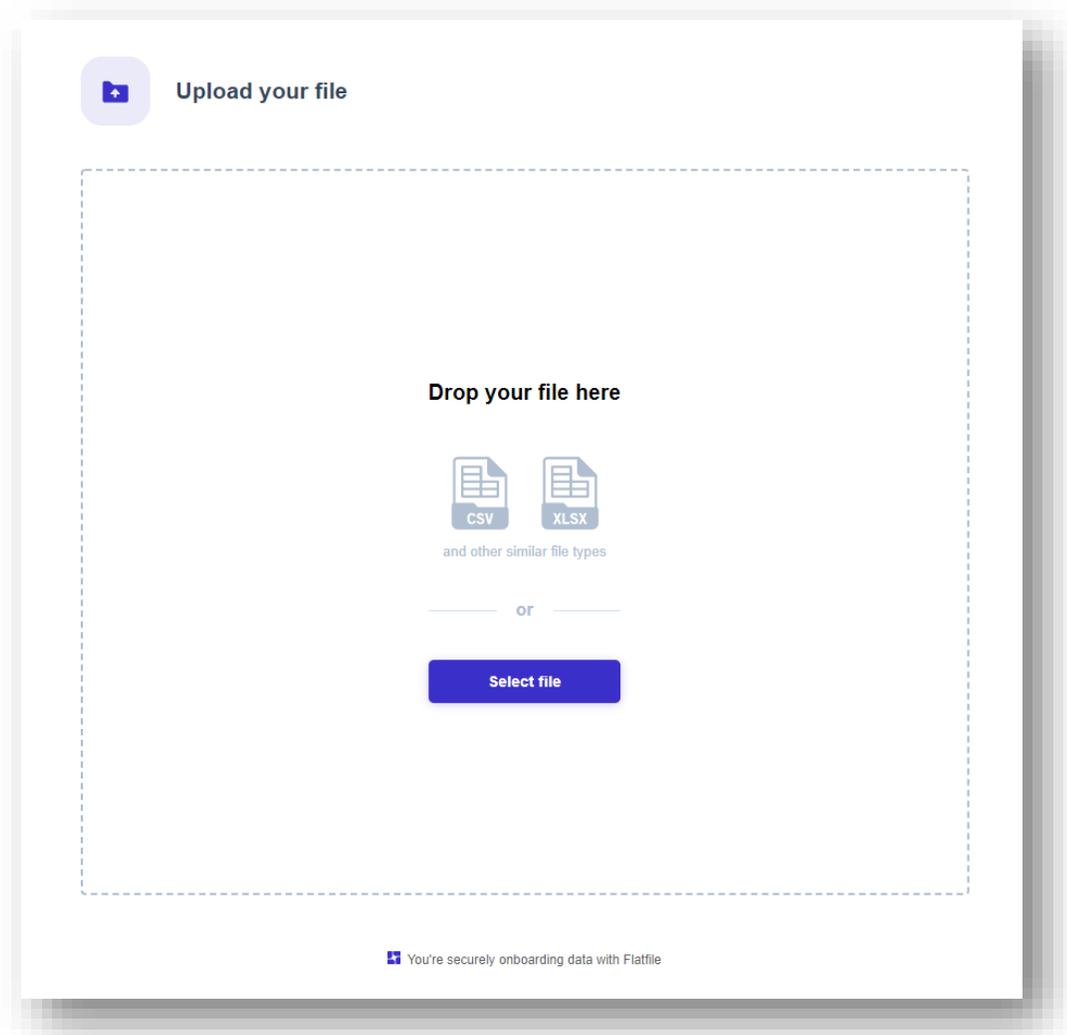
Change or Confirm Header Selection

Tell the Import Wizard where the header row is.

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

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

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.

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.