



# Employer Portal

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Quick Start Guide



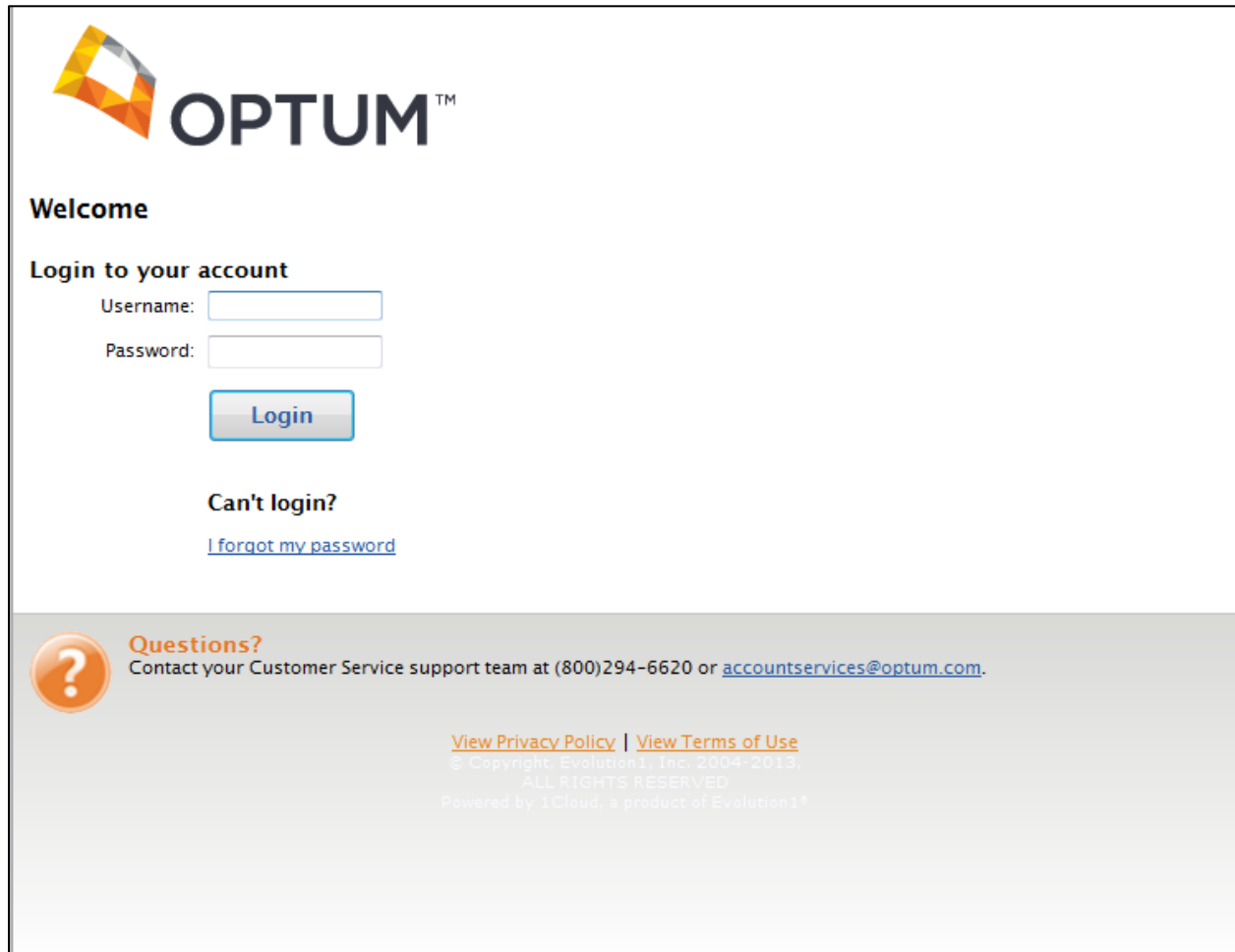
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## Logging into the Portal

Go to <https://employers/optumhealthfinancial.com> and enter the username and temporary password you received via email.

A screenshot of the OPTUM login portal. At the top left is the OPTUM logo. Below it is the heading "Welcome". Underneath is the section "Login to your account" which contains two input fields: "Username:" and "Password:". Below these fields is a blue "Login" button. Further down is the text "Can't login?" followed by a blue link that says "I forgot my password". At the bottom of the page, there is a grey footer area. On the left of the footer is an orange circle with a white question mark. To its right is the text "Questions?" followed by "Contact your Customer Service support team at (800)294-6620 or [accountservices@optum.com](mailto:accountservices@optum.com)". In the center of the footer are two links: "View Privacy Policy" and "View Terms of Use". Below these links is the copyright notice "© Copyright, Evolution1, Inc. 2004-2013, ALL RIGHTS RESERVED" and the text "Powered by 1Cloud, a product of Evolution1®".




## Resetting your password

Once you have entered your username and temporary password, the system will bring you to the **Change Password** page to reset your password. Your new password must meet the below requirements.

- minimum of 8 characters
- cannot match one of your last 3 passwords
- contain upper and lowercase letters
- contain at least one number

You will also need to select a security question and answer. Once completed, you can click **Update Password**.



### Change Password

*Current Password:	<input type="text"/>
*New Password:	<input type="text"/> <small>The password must: - Have a minimum of 8 characters - Not be one of your last 3 passwords - Contain upper and lowercase letters - Contain at least one number</small>
*Confirm New Password:	<input type="text"/>
*New Security Question:	What is your mother's maiden name? <input type="button" value="v"/>
*Answer:	<input type="text"/>

\* Required field



## User Access

You are assigned one or more roles that determine what features you have access to. If you require access to one of the features in the below sections of the manual that you do not currently have, please submit a request to your administrator or see the [Contact Us](#) section below.

- **Benefits Administrator**
  - View plans, access resources, and submit requests for your administrator.
- **Employee Administrator**
  - Manage individual employee data via an online form. May include adding new employees, adding dependents, updating employee profiles, updating dependents, enrolling employees, adding and updating employee enrollments.
- **Import Administrator**
  - Import new files, view the import queue, take action on files in the import queue and access the exception log to view errors within import files or updated errors and resubmit new files. Schedule recurring contributions.
- **Import Monitor**
  - View the import queue and access the exception log to view errors within import files.
- **Report Manager**
  - Request, view and remove reports.



## Navigating the Portal

### Navigating the Home Page

Once logged in, the first visible page will be the **Home** page. Some or all of the items shown on the below **Home** page may not be visible depending on your [user access](#).



Megan Magnuson ▾ | [Logout](#)

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[HOME](#)   [REPORTS](#)   [REQUESTS](#)   [EMPLOYEES ▾](#)   [PLANS](#)   [RESOURCES](#)   [IMPORTS ▾](#)   [LINKS ▾](#)

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Last Login Date: 9/13/2013 1:18:11 PM CDT  
Last Login Source: Employer Portal

### Welcome, Megan

Welcome to your benefits administration solution. View your plan details, access reports, manage employee information, and more!

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#### Recently Created Reports

[Employer Funding Notification \(9/5/2013 - 9/11/2013\)](#)  
Created: 9/12/2013 | [Detail Report](#) | EXCEL

[Employer Contributions Notification \(9/10/2013\)](#)  
Created: 9/10/2013 | [Detail Report](#) | PDF

[Payroll Deduction Notification \(9/10/2013\)](#)  
Created: 9/10/2013 | [Detail Report](#) | PDF

[Employer Funding Notification \(8/29/2013 - 9/4/2013\)](#)  
Created: 9/5/2013 | [Detail Report](#) | EXCEL

[Employer Funding Notification \(8/29/2013 - 9/4/2013\)](#)  
Created: 9/5/2013 | [Detail Report](#) | EXCEL

[View All Reports](#)

#### Import Queue

[0](#) Completed in the last 7 days

[Import Data From File](#)

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#### Questions?

Contact OptumHealth at (800) 294-6620 or [accountservices@optum.com](mailto:accountservices@optum.com).

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<p><a href="#">Reports</a></p> <p><a href="#">Requests</a></p> <p><a href="#">Employees</a></p> <p><a href="#">Plans</a></p> <p><a href="#">Resources</a></p> <p><a href="#">Imports</a></p>	<h4>Recently Viewed Report Types</h4> <p><a href="#">Employer Contributions</a></p>	<h4>Recently Viewed Employees</h4> <p><a href="#">Last_029, First_029 0</a></p> <p><a href="#">Apple, Green (999999999)</a></p> <p><a href="#">Last_145, First_145 0</a></p> <p><a href="#">Last_061, First_061 0</a></p> <p><a href="#">Last_060, First_060 0</a></p>
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From the **Home** page, you are able to access your **Recently Created Reports** by clicking on the blue hyperlinked name of each visible report. The reports are created in either PDF or EXCEL; this is indicated below each report name.

**Recently Created Reports**

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[Employer Funding Notification \(8/29/2013 – 9/4/2013\)](#)  
Created: 9/5/2013 | Detail Report | EXCEL 

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[Employer Funding Notification \(8/29/2013 – 9/4/2013\)](#)  
Created: 9/5/2013 | Detail Report | EXCEL

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[Employer Auto-Enrollment Notification \(9/4/2013\)](#)  
Created: 9/4/2013 | Detail Report | PDF

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[Employer Contributions Notification \(9/3/2013\)](#)  
Created: 9/3/2013 | Detail Report | PDF

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[Payroll Deduction Notification \(9/3/2013\)](#)  
Created: 9/3/2013 | Detail Report | PDF

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[View All Reports](#)

You can go to the **Reports** page by clicking on **View All Reports** which appears below the list of reports (see section [Navigating the Reports Page](#) for more information).

**Recently Created Reports**

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[Employer Funding Notification \(8/29/2013 – 9/4/2013\)](#)  
Created: 9/5/2013 | Detail Report | EXCEL

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[Employer Funding Notification \(8/29/2013 – 9/4/2013\)](#)  
Created: 9/5/2013 | Detail Report | EXCEL

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[Employer Auto-Enrollment Notification \(9/4/2013\)](#)  
Created: 9/4/2013 | Detail Report | PDF

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[Employer Contributions Notification \(9/3/2013\)](#)  
Created: 9/3/2013 | Detail Report | PDF

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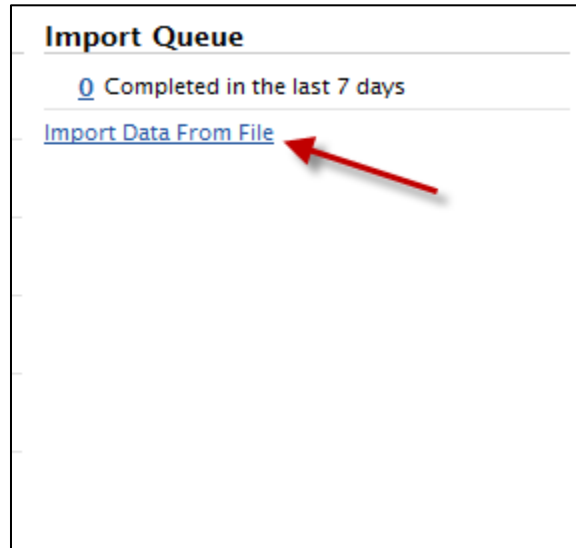
[Payroll Deduction Notification \(9/3/2013\)](#)  
Created: 9/3/2013 | Detail Report | PDF

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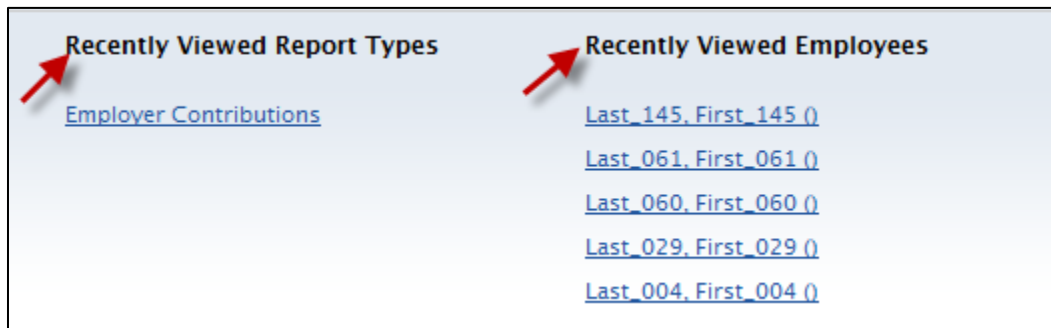
[View All Reports](#) 



You can also view the **Import Queue** from the **Home** page. You can see the number of files imported in the last 7 days and access the **Import** page by clicking the link **Import Data From File** (see [Navigating the Imports Page](#) for more information).



From the **Home** page, at the bottom of the screen, you can also view your **Recently Viewed Report Types** and **Recently Viewed Employees**





From this view, there are two ways to access the other pages. You can use the navigation panel that appears across the top of the **Home** page or by clicking the links on the bottom left of the screen. These will appear in the same location of each page.



The screenshot displays the OPTUM user interface. At the top left is the OPTUM logo. The user's name, Megan Magnuson, and a Logout link are in the top right. A navigation bar below the header contains links for HOME, REPORTS, REQUESTS, EMPLOYEES, PLANS, RESOURCES, IMPORTS, and LINKS. A red arrow points to the HOME link. Below the navigation bar, the user's last login information is shown: Last Login Date: 9/13/2013 1:18:11 PM CDT, Last Login Source: Employer Portal. A welcome message for Megan follows. The main content area is divided into two columns: 'Recently Created Reports' and 'Import Queue'. The 'Recently Created Reports' section lists five reports with their creation dates and available formats (EXCEL or PDF). The 'Import Queue' section shows 0 completed imports in the last 7 days and a link to 'Import Data From File'. A 'Questions?' section provides contact information for OptumHealth. At the bottom, there are three columns: 'Reports' (with links for Reports, Requests, Employees, Plans, Resources, Imports), 'Recently Viewed Report Types' (with a link for Employer Contributions), and 'Recently Viewed Employees' (with links for Last\_029, First\_029, Apple\_Green, Last\_145, First\_145, Last\_061, First\_061, Last\_060, First\_060). A red arrow points to the 'Employees' link in the bottom left column.

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Megan Magnuson ▾ | [Logout](#)

[HOME](#) | [REPORTS](#) | [REQUESTS](#) | [EMPLOYEES ▾](#) | [PLANS](#) | [RESOURCES](#) | [IMPORTS ▾](#) | [LINKS ▾](#)

Last Login Date: 9/13/2013 1:18:11 PM CDT  
Last Login Source: Employer Portal

### Welcome, Megan

Welcome to your benefits administration solution. View your plan details, access reports, manage employee information, and more!

#### Recently Created Reports

- [Employer Funding Notification \(9/5/2013 – 9/11/2013\)](#)  
Created: 9/12/2013 | [Detail Report](#) | EXCEL
- [Employer Contributions Notification \(9/10/2013\)](#)  
Created: 9/10/2013 | [Detail Report](#) | PDF
- [Payroll Deduction Notification \(9/10/2013\)](#)  
Created: 9/10/2013 | [Detail Report](#) | PDF
- [Employer Funding Notification \(8/29/2013 – 9/4/2013\)](#)  
Created: 9/5/2013 | [Detail Report](#) | EXCEL
- [Employer Funding Notification \(8/29/2013 – 9/4/2013\)](#)  
Created: 9/5/2013 | [Detail Report](#) | EXCEL

[View All Reports](#)

#### Import Queue

0 Completed in the last 7 days

[Import Data From File](#)

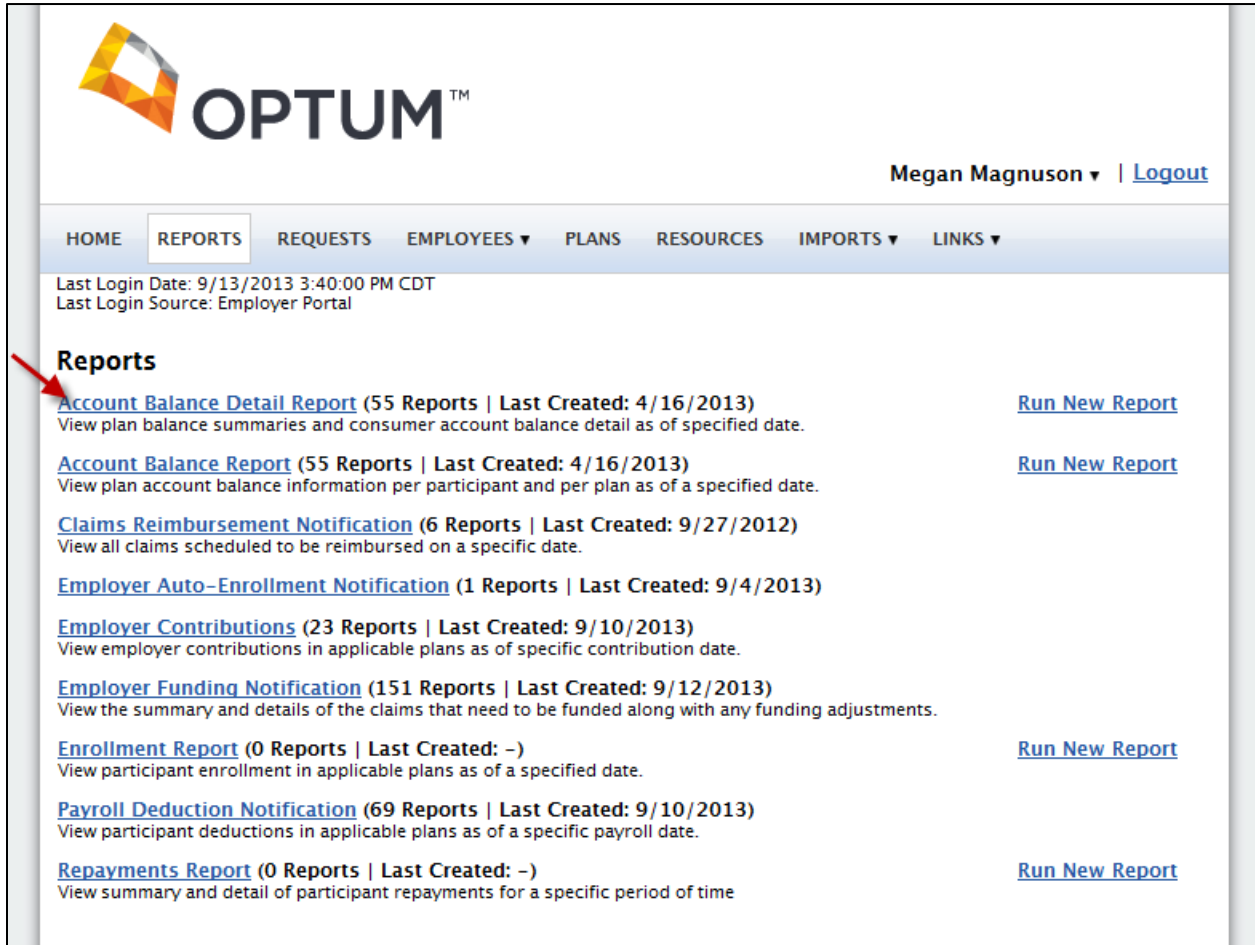
**Questions?**  
Contact OptumHealth at (800) 294-6620 or [accountservices@optum.com](mailto:accountservices@optum.com).

Reports	Recently Viewed Report Types	Recently Viewed Employees
<a href="#">Requests</a>	<a href="#">Employer Contributions</a>	<a href="#">Last_029, First_029 ()</a>
<a href="#">Employees</a>		<a href="#">Apple_Green (999999999)</a>
<a href="#">Plans</a>		<a href="#">Last_145, First_145 ()</a>
<a href="#">Resources</a>		<a href="#">Last_061, First_061 ()</a>
<a href="#">Imports</a>		<a href="#">Last_060, First_060 ()</a>

[View Privacy Policies](#)

## Navigating the Reports Page

From the **Reports** page, you can view all available reports. You can access these reports by clicking on the blue hyperlinked name of each report. Some or all of the items shown on the below **Reports** page may not be visible depending on your [user access](#).




The screenshot shows the OPTUM user interface. At the top left is the OPTUM logo. On the top right, the user name "Megan Magnuson" is displayed with a dropdown arrow and a "Logout" link. Below this is a navigation menu with tabs for HOME, REPORTS (which is highlighted), REQUESTS, EMPLOYEES (with a dropdown arrow), PLANS, RESOURCES, IMPORTS (with a dropdown arrow), and LINKS (with a dropdown arrow). Under the navigation menu, the user's login information is shown: "Last Login Date: 9/13/2013 3:40:00 PM CDT" and "Last Login Source: Employer Portal". The main content area is titled "Reports" and contains a list of report categories. A red arrow points to the first report, "Account Balance Detail Report". Each report entry includes a blue hyperlinked title, the number of reports and the last creation date, a brief description, and a "Run New Report" link.

Report Name	Number of Reports	Last Created	Description	Action
<a href="#">Account Balance Detail Report</a>	55 Reports	4/16/2013	View plan balance summaries and consumer account balance detail as of specified date.	<a href="#">Run New Report</a>
<a href="#">Account Balance Report</a>	55 Reports	4/16/2013	View plan account balance information per participant and per plan as of a specified date.	<a href="#">Run New Report</a>
<a href="#">Claims Reimbursement Notification</a>	6 Reports	9/27/2012	View all claims scheduled to be reimbursed on a specific date.	
<a href="#">Employer Auto-Enrollment Notification</a>	1 Reports	9/4/2013		
<a href="#">Employer Contributions</a>	23 Reports	9/10/2013	View employer contributions in applicable plans as of specific contribution date.	
<a href="#">Employer Funding Notification</a>	151 Reports	9/12/2013	View the summary and details of the claims that need to be funded along with any funding adjustments.	
<a href="#">Enrollment Report</a>	0 Reports	-	View participant enrollment in applicable plans as of a specified date.	<a href="#">Run New Report</a>
<a href="#">Payroll Deduction Notification</a>	69 Reports	9/10/2013	View participant deductions in applicable plans as of a specific payroll date.	
<a href="#">Repayments Report</a>	0 Reports	-	View summary and detail of participant repayments for a specific period of time	<a href="#">Run New Report</a>



If available, you can also run a new report by clicking **Run New Report** to the right of the report name.

Megan Magnuson ▾ | [Logout](#)


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HOME REPORTS REQUESTS EMPLOYEES ▾ PLANS RESOURCES IMPORTS ▾ LINKS ▾

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Last Login Date: 9/13/2013 3:40:00 PM CDT  
Last Login Source: Employer Portal

### Reports

<a href="#">Account Balance Detail Report</a> (55 Reports   Last Created: 4/16/2013) View plan balance summaries and consumer account balance detail as of specified date.	 <a href="#">Run New Report</a>
<a href="#">Account Balance Report</a> (55 Reports   Last Created: 4/16/2013) View plan account balance information per participant and per plan as of a specified date.	<a href="#">Run New Report</a>
<a href="#">Claims Reimbursement Notification</a> (6 Reports   Last Created: 9/27/2012) View all claims scheduled to be reimbursed on a specific date.	
<a href="#">Employer Auto-Enrollment Notification</a> (1 Reports   Last Created: 9/4/2013)	
<a href="#">Employer Contributions</a> (23 Reports   Last Created: 9/10/2013) View employer contributions in applicable plans as of specific contribution date.	
<a href="#">Employer Funding Notification</a> (151 Reports   Last Created: 9/12/2013) View the summary and details of the claims that need to be funded along with any funding adjustments.	
<a href="#">Enrollment Report</a> (0 Reports   Last Created: -) View participant enrollment in applicable plans as of a specified date.	<a href="#">Run New Report</a>
<a href="#">Payroll Deduction Notification</a> (69 Reports   Last Created: 9/10/2013) View participant deductions in applicable plans as of a specific payroll date.	
<a href="#">Repayments Report</a> (0 Reports   Last Created: -) View summary and detail of participant repayments for a specific period of time	<a href="#">Run New Report</a>



## Navigating the Requests Page

You can utilize the **Requests** page to submit a request for such actions as adding a new employee, changing an employee's enrollment and so on. Some or all of the items shown on the below **Requests** page may not be visible depending on your [user access](#).

You will first select the request type from the drop down list.

The screenshot shows a web form titled "Requests". It contains several input fields and buttons:

- \*Request Type:** A dropdown menu is open, showing a list of request types. The first option is "Please select a request type..." (highlighted in blue), followed by "Change employee information", "Terminate employee", "Change LOA", "Add new employee", "Add new enrollment", "Change enrollment", "Add user to employer portal", "Add employer contact", "Change payroll deductions", "Change to form", "Suggest enhancements", "Process a contribution file", and "Other".
- Employee Name:** A text input field with a "Find..." button to its right.
- \* Details:** A text input field.
- Attachment:** A text input field with a "Browse..." button to its right.
- \* Required field** label is located at the bottom left.
- Submit Request** button is located at the bottom center.

To enter the Employee Name, select the **Find** button. You can then either search by the employee's last name or browse through the pages of all employees. Once the employee is selected, you will add the specifics of your request to the **Details** section and attach any applicable files.

### Find Employee

Search by Last Name:  [View](#) | [View All](#)

Last Name	First Name	Email Address
<a href="#">Last_012</a>	First_012	1@1.com
<a href="#">Last_013</a>	First_013	1@1.com
<a href="#">Last_014</a>	First_014	1@1.com
<a href="#">Last_015</a>	First_015	1@1.com
<a href="#">Last_016</a>	First_016	1@1.com
<a href="#">Last_017</a>	First_017	1@1.com
<a href="#">Last_018</a>	First_018	1@1.com
<a href="#">Last_019</a>	First_019	1@1.com
<a href="#">Last_020</a>	First_020	1@1.com
<a href="#">Last_021</a>	First_021	1@1.com

< [Prev](#) ... [5](#) **6** [7](#) [8](#) ... [Next](#) > | Page 6 of 58

[Close](#)



## Navigating the Employees Page

When you scroll over the **Employees** tab in the navigation panel you will see several shortcuts to the available actions in the **Employees** page. Some or all of the items shown on the below **Employees** page may not be visible depending on your [user access](#).

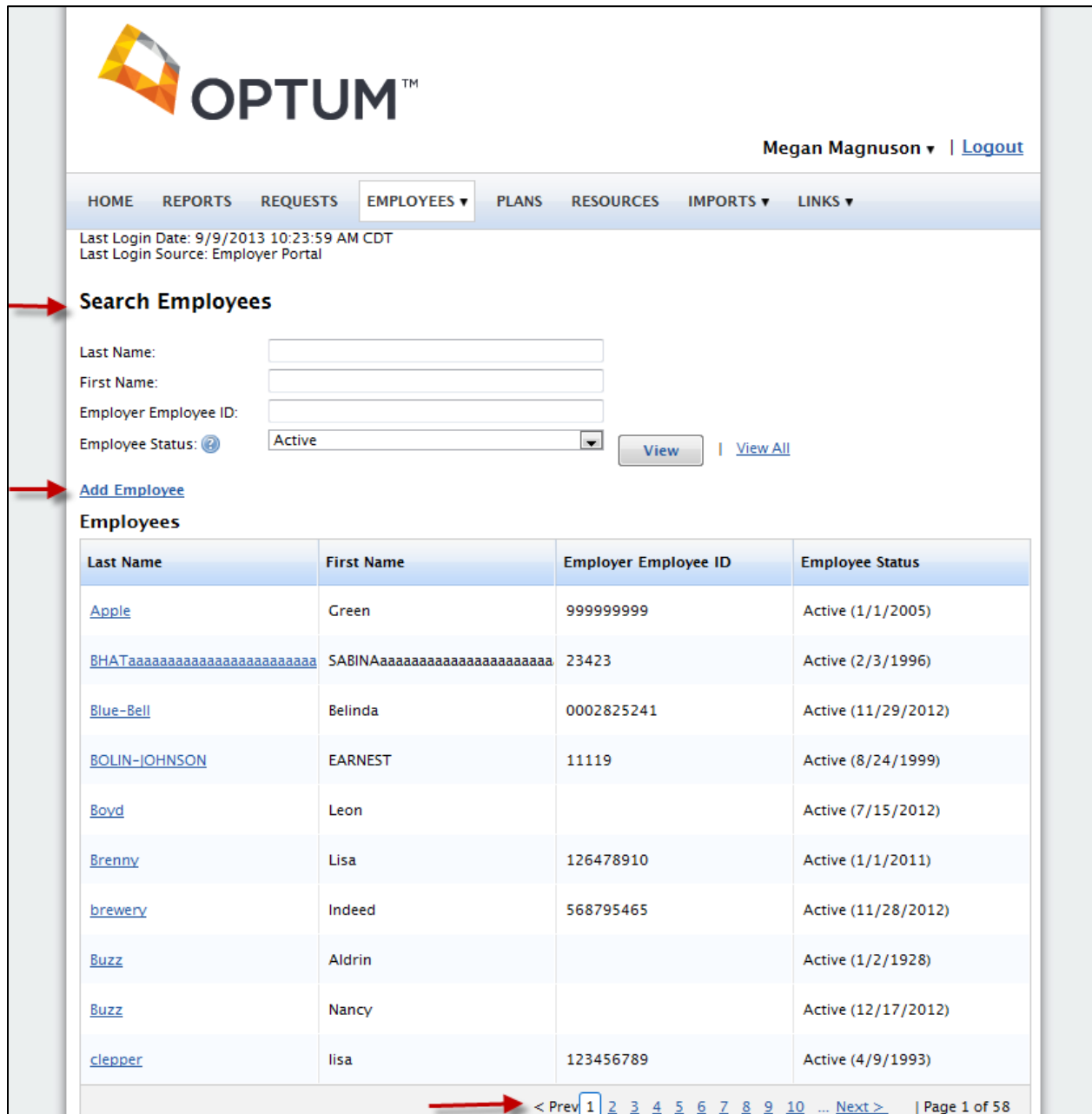
From this shortcut you can click links to **View All Employees**, **Add Employee**, **Search Employees**, and select any **Recently View Employees**.

The screenshot shows the OPTUM web application interface. At the top left is the OPTUM logo. In the top right corner, the user name "Megan Magnuson" is displayed with a dropdown arrow, and a "Logout" link is next to it. Below the header is a navigation bar with tabs: HOME, REPORTS, REQUESTS, EMPLOYEES (highlighted with a mouse cursor), PLANS, RESOURCES, IMPORTS (with a dropdown arrow), and LINKS (with a dropdown arrow). A dropdown menu is open under the EMPLOYEES tab, containing the following items:

- [View All Employees](#)
- [Add Employee](#)
- Search Employees**
  - Last Name:
  - First Name:
  - Employer Employee ID:
  - Employee Status:
  -
- Recently Viewed Employees**
  - [Last\\_029, First\\_029 \(\)](#)
  - [Apple, Green \(999999999\)](#)
  - [Last\\_145, First\\_145 \(\)](#)
  - [Last\\_061, First\\_061 \(\)](#)
  - [Last\\_060, First\\_060 \(\)](#)

On the left side of the page, there is a "Welcome, Megan" message and a "Recently Created Reports" section with several report links and their creation dates.

You can also access the same actions mentioned above by clicking on the tab.



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HOME REPORTS REQUESTS **EMPLOYEES ▾** PLANS RESOURCES IMPORTS ▾ LINKS ▾


Last Login Date: 9/9/2013 10:23:59 AM CDT  
Last Login Source: Employer Portal

**Search Employees**

Last Name:

First Name:

Employer Employee ID:

Employee Status:    | [View All](#)

**Add Employee**

**Employees**

Last Name	First Name	Employer Employee ID	Employee Status
<a href="#">Apple</a>	Green	999999999	Active (1/1/2005)
<a href="#">BHATAaaaaaaaaaaaaaaaaaaaaa</a>	SABINAaaaaaaaaaaaaaaaaaaaa	23423	Active (2/3/1996)
<a href="#">Blue-Bell</a>	Belinda	0002825241	Active (11/29/2012)
<a href="#">BOLIN-JOHNSON</a>	EARNEST	11119	Active (8/24/1999)
<a href="#">Boyd</a>	Leon		Active (7/15/2012)
<a href="#">Brenny</a>	Lisa	126478910	Active (1/1/2011)
<a href="#">brewery</a>	Indeed	568795465	Active (11/28/2012)
<a href="#">Buzz</a>	Aldrin		Active (1/2/1928)
<a href="#">Buzz</a>	Nancy		Active (12/17/2012)
<a href="#">clepper</a>	lisa	123456789	Active (4/9/1993)

< Prev **1** 2 3 4 5 6 7 8 9 10 ... Next > | Page 1 of 58



To add a new employee, click **Add Employee** and fill in the Employee profile shown below. To submit the new employee's profile click the **Add Employee** button at the bottom of the screen.

The screenshot shows the 'Add Employee Profile' form in the OPTUM system. The form is titled 'Add Employee Profile' and is under the 'Personal Information' section. It contains various input fields for employee details:

- First Name:** Text input field.
- Middle Initial:** Text input field.
- Last Name:** Text input field.
- Birth Date:** Date picker with a calendar icon. Below the field, it says 'Format date as mm/dd/yyyy.'
- SSN:** Text input field with a hyphen separator.
- Gender:** Radio buttons for 'Female' and 'Male'.
- Marital Status:** Radio buttons for 'Married' and 'Single'.
- Country:** Dropdown menu with 'United States' selected.
- Address Line 1:** Text input field.
- Address Line 2:** Text input field.
- City:** Text input field.
- State:** Dropdown menu with 'Alabama' selected.
- ZIP Code:** Text input field.

At the bottom of the form, there is a label 'Home Phone Number:' followed by three empty text input fields.

When viewing an individual employee's record you can see the employee's Profile, **Account Summary, Enrollments, Contributions, Claims, Payments, and Status.**





## Navigating the Plans Page

Navigating to the **Plans** page will allow you to view any active plans including the effective dates and a basic description. To open one plan specifically, you can click on the blue hyperlinked plan name. Some or all of the items shown on the below **Plans** page may not be visible depending on your [user access](#).



Megan Magnuson ▾ | [Logout](#)

HOME REPORTS REQUESTS EMPLOYEES ▾ **PLANS** RESOURCES IMPORTS ▾ LINKS ▾

Last Login Date: 9/13/2013 3:40:00 PM CDT  
Last Login Source: Employer Portal

### Plans

**Active Plans**

[Medical Flex](#) (5/4/2014 - 5/4/2015)

**What is a health care flexible spending account (FSA)? How does a health care FSA work?**

A health care flexible spending account (FSA) is an expense reimbursement account offered through an employer that allows employees to set aside part of their earnings, before income taxes are deducted, to pay for eligible health-related expenses. By setting aside pre-tax dollars in a health care FSA, you can reduce your taxable income and increase your after-tax income because every dollar contributed to a health care FSA reduces your earnings by the same amount. This money is then returned to you in the form of reimbursements for health care expenses that you have already paid out-of-pocket.

You can use the funds in a health care FSA to be reimbursed for out-of-pocket health care expenses that you incur personally or that are incurred by your spouse or dependent. After an eligible expense has been incurred, you submit a claim, along with supporting proof. If the claim is approved, a reimbursement check will be mailed to your home in approximately two weeks. If you prefer, your reimbursement can be deposited directly to your account. Health care FSA contributions do not rollover to the next Plan Year so you must use all health care FSA contributions made during a Plan Year by the end of the plan year, or the funds will be forfeited.

[Dependent Care](#) (5/4/2014 - 5/4/2015)

**What is a Dependent Care Flexible Spending Account (DC FSA)? How does a dependent care spending account work?**

A Dependent Care Flexible Spending Account (DC FSA) is a specific type of expense reimbursement account offered by an employer that allows employees to set aside part of their earnings, before income taxes are deducted, to pay for eligible expenses related to caring for a dependent so the employee or his/her spouse can work. By setting aside pre-tax dollars in a DC FSA, you can reduce your taxable income and increase your after-tax income because every dollar that you contribute decreases your earnings. As a result, the amount of taxes that you pay is reduced by the same amount. This money is returned to you in the form of reimbursements for dependent care expenses that you have already paid out-of-pocket.


IRS regulations cap total DC FSA contributions at \$5,000 per household per year. Most people think of a DC FSA in terms of reimbursement for childcare services. However, adult day care services for an adult dependent, such as an elderly relative, also are reimbursable. DC FSA contributions *do not* rollover to the next Plan Year so you must use all DC FSA contributions made during a Plan Year by the end of the Grace Period or the funds will be forfeited.

After an eligible expense has been incurred, submit a reimbursement claim, along with supporting documentation, to your claims administrator by fax, email, online or mail. If the claim is approved, a reimbursement check will be mailed to your home in approximately two weeks. If you prefer, your reimbursement can be deposited directly to your bank account. <



## Navigating the Resources Page

On the **Resources** page you will see a list of forms that can be accessed by both the employer and the participant. Some or all of the items shown on the below **Resources** page may not be visible depending on your [user access](#).

Megan Magnuson ▾ | [Logout](#)

[HOME](#) [REPORTS](#) [REQUESTS](#) [EMPLOYEES ▾](#) [PLANS](#) **[RESOURCES](#)** [IMPORTS ▾](#) [LINKS ▾](#)

Last Login Date: 9/13/2013 3:40:00 PM CDT  
Last Login Source: Employer Portal

### Resources

- [Authorized Representative Designation Form](#)
- [Claims Terms and Conditions](#)
- [Debit Card Request Form](#)
- [Debit Card Transaction Dispute Form](#)
- [Dependent Care Receipt Form](#)
- [Designation of Beneficiary](#)
- [Direct Deposit Form](#)
- [Domestic Partner Affidavit](#)
- [FSA Claim Form](#)
- [HRA Claim Form](#)
- [Next Steps](#)
- [Recurring Expense Reimbursement Request Form](#)
- [Revocation of Authorized Representative Designation Form](#)
- [RRA Claim Form](#)
- [Terms of Use](#)
- [TRANS Claim Form](#)
- [Website Privacy Policy](#)




## Navigating the Imports Page

By hovering over the **Imports** tab at the top of the screen, you will see shortcuts to access your **Import Queue** and **Import Data**. Some or all of the items shown on the below **Imports** page may not be visible depending on your [user access](#).

The screenshot displays the OPTUM user interface. At the top left is the OPTUM logo. In the top right corner, the user's name "Megan Magnuson" is shown with a dropdown arrow, followed by a "Logout" link. A horizontal navigation bar contains several tabs: HOME, REPORTS, REQUESTS, EMPLOYEES (with a dropdown arrow), PLANS, RESOURCES, IMPORTS (with a dropdown arrow and a mouse cursor hovering over it), and LINKS (with a dropdown arrow). Below the navigation bar, the "IMPORTS" dropdown menu is open, showing two options: "Import Queue" and "Import Data", both as blue underlined text. On the left side of the page, below the navigation bar, the text "Last Login Date: 9/16/2013 12:46:37 PM CDT" and "Last Login Source: Employer Portal" is displayed. Below this, a "Welcome, Megan" heading is followed by a paragraph: "Welcome to your benefits administration solution. View your plan details, access reports, manage employee information, and more!"

If you select **Import Data** or **Import Data from File**, you can upload a file directly. You will first select a template for the type of file you want to upload then follow the steps listed to open the template, enter your relevant data, save a master copy of the file and save a copy as a Comma Separated Values (.csv) file. You will then browse to your file and select **Import Data**.



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Last Login Date: 9/16/2013 2:25:08 PM CDT  
Last Login Source: Employer Portal

### Import Data From File

*Data To Import:	<input type="text" value="Select a template"/>
	Select an import template.
Step 1:	Open the template in Excel.
Step 2:	Enter or copy and paste your data into the template.
Step 3:	Certain fields must match information setup by your administrator. If the field does not match the setup data, the record you're attempting to import will fail.
Step 4:	Save a "master" copy of the file for yourself: Select File >> Save
	Save a separate copy of the file as CSV to import: Select File >> Save As Select CSV (Comma delimited) under "Save as Type" Consider adding "CSV" to the File Name so you can differentiate it from your "master" file Save the file to a location you can remember Select "Yes" from the message about preserving formatting and compatibility
	Note: If you need to make edits after submitting a file, you should edit the master copy and when completed with your edits, re-save a new CSV file.
* Upload File:	<input type="text"/> <input type="button" value="Browse..."/>
	Locate the CSV file you saved in step 4, containing the data you wish to import.

\* Required field    | [Cancel](#)



If you click on **Imports** or **Import Queue** you can search your imported file by date or file name and view your **Pending** imports, **Failed** imports, **In Process** imports, or **Completed/Canceled** imports.

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### Import Queue

Date Received:

Date Processed:

File Name:   | [View All](#)

[Import Data From File](#)

#### Pending (0 Files)

Date Received	File Name	Status	Failed Records	Actions
No records to display.				

#### Failed / On Hold (0 Files)

Date Received	File Name	Status	Failed Records	Actions
No records to display.				

#### In Process (0 Files)


Date Received	File Name	Status	Failed Records	Actions
No records to display.				

#### Completed / Canceled (6 Files)


Date Received	File Name	Status	Failed Records	Actions
3/26/2013 2:08 PM	TEST Enrollment Template 26Mar2013.csv	Complete	0 of 1	.
3/26/2013 1:49 PM	TEST Demographic Template 26Mar2013.cs	Complete	1 of 1	<input type="button" value="View Errors"/>



You can also **View Errors**, if any, that are associated to a completed file.

Completed / Canceled (6 Files)					
	Date Received	File Name	Status	Failed Records	Actions
	3/26/2013 2:08 PM	TEST Enrollment Template 26Mar2013.csv	Complete	0 of 1	.
	3/26/2013 1:49 PM	TEST Demographic Template 26Mar2013.cs	Complete	1 of 1	<a href="#">View Errors</a> 
	3/26/2013 1:44 PM	TEST Contribution Template 26Mar2013.cs	Canceled	0 of 0	.
	3/26/2013 9:50 AM	TEST Contribution Template 26Mar2013.cs	Complete	1 of 1	<a href="#">View Errors</a> .
	12/17/2012 2:39 PM	Test Enrollment.csv	Complete	2 of 2	<a href="#">View Errors</a> .
	12/17/2012 2:31 PM	Test ER file.csv	Complete	0 of 2	.

This will allow you to review any errors that occurred when uploading the file. If you would like to view more details, you can select the **Exception Report** to export a excel file containing details of any errors that occurred during upload.


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Last Login Date: 9/18/2013 2:44:28 PM CDT  
 Last Login Source: Employer Portal

### Exception Log



Date Received: 12/17/2012 2:39:15 PM (Version 1) ▾ [View History](#)

File Name: Test Enrollment.csv

Date Processed: 12/17/2012 2:47:00 PM

 One or more errors affect multiple rows. View the [Exception Report](#) for more information.

#### Enrollment (2 Errors/Warnings)

	Record	Participant File Import ID	Plan Name	Field Name	Error	Error Data
	<a href="#">2</a>		Medical Flex	ParticipantFileImportId	055-76-0001 does not match a participant	055-76-0001
	<a href="#">3</a>		Medical Flex	ParticipantFileImportId	155-76-0001 does not match a participant	155-76-0001

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Resubmit File
|
Cancel



## Navigating to Links

The **Links** tab provides a direct link to any websites which may be relevant to you or your employees (e.g., IRS Publication 969 and OptumHealth Financial Services website). You can access these links by scrolling over the Links tab at the top of the page and clicking on the individual links.



## Contact Us

If you have any questions, please contact OptumHealth at (800)294-6620 or [accountservices@optum.com](mailto:accountservices@optum.com)