

File Manager

# HOW TO **GUIDE**

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**SECURE, EFFICIENT, AND STREAMLINED**  
FILE UPLOAD AND VALIDATION

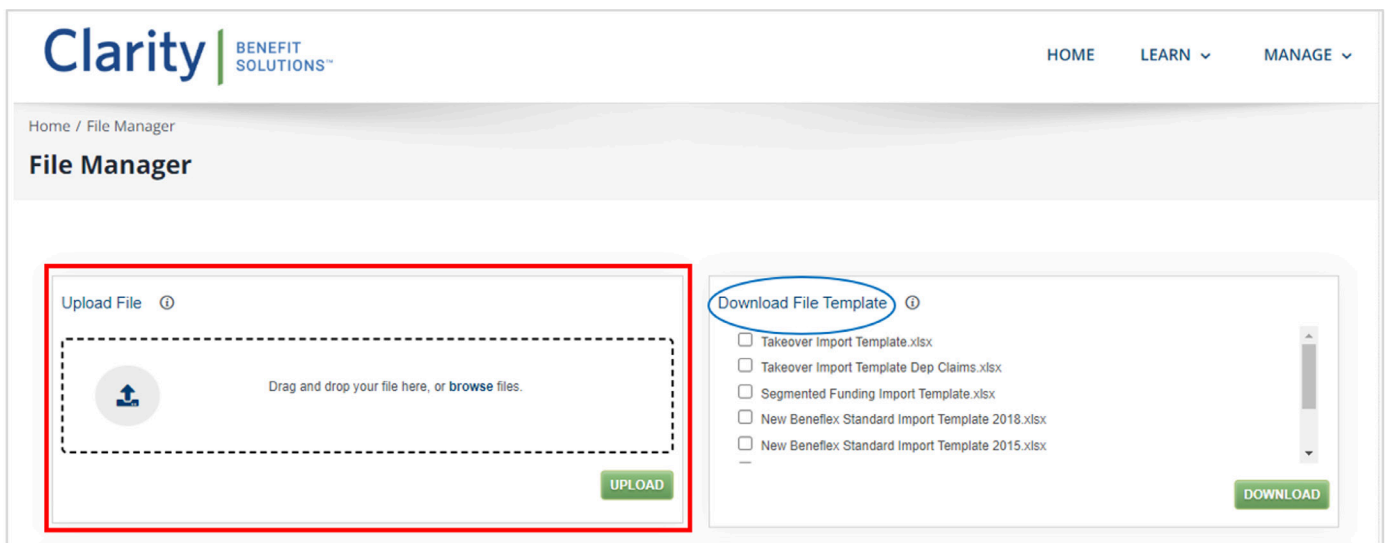


# FILE MANAGER HOW TO GUIDE

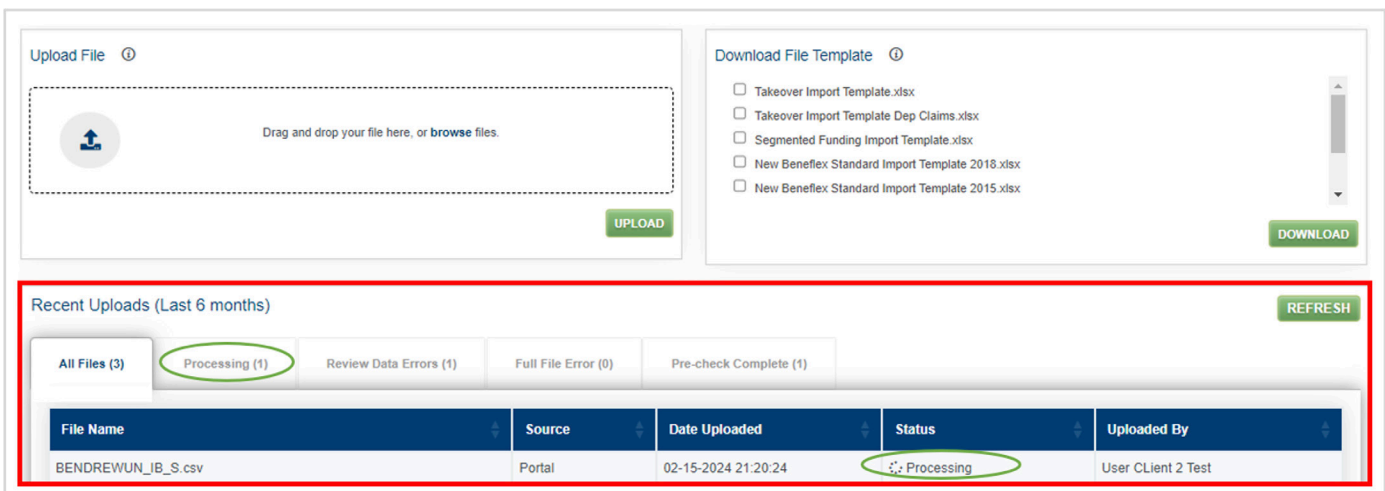
**File Manager** by Clarity Benefit Solutions is a cutting-edge solution designed to streamline the process of uploading demographic and other essential files securely through the Clarity Portal. With File Manager, customers can ensure data accuracy and security while enjoying the convenience of real-time file format validation and comprehensive processing history, regardless of the data source.

## UPLOAD AND VALIDATE FILES IN 4 EASY STEPS:

1. Login to the **Clarity Portal** and go to **Manage → File Manager**.
2. **Upload your file/s** through the **Browse** or **Drag and Drop** feature. Standard file templates are available in the **Download File Template** section on the right.



3. Uploaded files appear in the **Recent Uploads** section where it's processed and checked for common data errors (missing data, incorrect plan names, incorrect or missing dates, etc.) in real-time. File Manager retains uploaded files from the last 6 months.



## FILE MANAGER HOW TO GUIDE

4. There are 3 possible file **STATUS** results:
- Pre-check Complete** – This means there were no errors found.

**Main View:**

Recent Uploads (Last 6 months) REFRESH

**All Files (3)** Processing (1) Review Data Errors (1) Full File Error (0) Pre-check Complete (1)

File Name	Source	Date Uploaded	Status	Uploaded By
BENDREWUN_IB_S.csv	Portal	02-15-2024 21:20:24	Pre-check Complete	User CLient 2 Test

**Tab View:**

Recent Uploads (Last 6 months) REFRESH

All Files (3) Processing (1) Review Data Errors (1) Full File Error (0) **Pre-check Complete (1)**

File Name	Source	Date Uploaded	Status	Uploaded By
BENDREWUN_IB_S.csv	Portal	02-15-2024 21:20:24	Pre-check Complete	User CLient 2 Test

Showing 1 to 1 of 1 entries Previous **1** Next

- A **Pre-check Success notification** will be sent, and the file will be queued for final processing.
- If any errors are returned from final processing, your CRM will reach out to assist with any additional issues.

- Review Data Errors** – Some errors were found. Individual records that passed the pre-check are queued and sent for final processing.

**Main View:**

Recent Uploads (Last 6 months) REFRESH

**All Files (3)** Processing (1) Review Data Errors (1) Full File Error (0) Pre-check Complete (1)

File Name	Source	Date Uploaded	Status	Uploaded By
BENRSM_IC_AL_20240213--080549359.mbi	Portal	02-14-2024 00:07:29	Review Data Errors	Ennoble CP Participant

**Tab View:**

Recent Uploads (Last 6 months) REFRESH

All Files (3) Processing (1) **Review Data Errors (1)** Full File Error (0) Pre-check Complete (1)

File Name	Source	Date Uploaded	Status	Uploaded By
BENRSM_IC_AL_20240213--080549359.mbi	Portal	02-14-2024 00:07:29	Review Data Errors	Ennoble CP Participant

Showing 1 to 1 of 1 entries Previous **1** Next

# FILE MANAGER HOW TO GUIDE

- An **Error** notification will be sent. To ensure errors are addressed in a timely manner, client will receive 2 reminder notices before a CRM reaches out.
- **To fix the outstanding file error:**
  - Click the “**Review Data Errors**” tab then click the “**Review Data Errors**” link under Status.
  - **Review Records section** will appear underneath showing how many entries/records need to fixed.
  - To make in-line edits, **click the pencil icon under “Action” column**, edit the text (you can click on the “i” icon to see the explanation of the error)
  - Click **Submit**.

Recent Uploads (Last 6 months) REFRESH

All Files (3) Processing (1) **Review Data Errors (1)** Full File Error (0) Pre-check Complete (1)

File Name	Source	Date Uploaded	Status	Uploaded By
BENRSM_IC_AL_20240213--080549359.mbi	Portal	02-14-2024 00:07:29	<a href="#">Review Data Errors</a>	Ennable CP Participant

Showing 1 to 1 of 1 entries Previous 1 Next

Review Records - BENRSM\_IC\_AL\_20240213--080549359.mbi

Enrollment

Action	Status	EmployerID	PlanID	EmployeeID	AccountTypeCode	PlanStartDate	PlanEndDate
<b>3</b>	Review Data Errors	BENRSM	DCA	XXXX-XXXX-7257	DCP	20230101	20231231
	Review Data Errors	X BENRSM	X Med	XXXX-XXXX-0659	X FSA	X 20230101	X 20231231
	Review Data Errors	X BENRSM	X Med	XXXX-XXXX-5802	X FSA	X 20230101	X 20231231
	Review Data Errors	X BENRSM	X Med	XXXX-XXXX-4351	X FSA	X 20230101	X 20231231
	Review Data Errors	X BENRSM	X Med	XXXX-XXXX-0601	X FSA	X 20230101	X 20231231
	Review Data Errors	X BENRSM	X DCA	XXXX-XXXX-8646	X DCP	X 20230101	X 20231231

Showing 11 to 16 of 16 entries Previous 1 2 Next

**4** **SUBMIT**

- A **Pre-check Success notification** will be sent, and the file will be queued for final processing.
- If any errors are returned from final processing, your CRM will reach out to assist with any additional issues.

# FILE MANAGER HOW TO GUIDE

- c. **Full File Error** – This means a major error was found (i.e. employer ID not recognized, incorrect file format) and a completely new file will have to be uploaded.

**Main View:**

Recent Uploads (Last 6 months) REFRESH

**All Files (4)** Processing (1) Review Data Errors (1) Full File Error (1) Pre-check Complete (1)

File Name	Source	Date Uploaded	Status	Uploaded By
BENEFLEX2NEW_IH_FFE.mbi	Portal	02-16-2024 01:46:02	Full File Error	user_client_2@test Test

**Tab View:**

Recent Uploads (Last 6 months) REFRESH

All Files (4) Processing (1) Review Data Errors (1) **Full File Error (1)** Pre-check Complete (1)

File Name	Source	Date Uploaded	Status	Uploaded By
BENEFLEX2NEW_IH_FFE.mbi	Portal	02-16-2024 01:46:02	Full File Error	user_client_2@test Test

Showing 1 to 1 of 1 entries Previous 1 Next

- An **Error notification** will be sent. To ensure errors are addressed in a timely manner, client will receive 2 reminder notices before a CRM reaches out.
- **Reupload the corrected file** through the File Manager using the Browse or Drag or Drop feature.
- Once all errors are addressed, a **Pre-check Success notification** will be sent, and the file will be queued for final processing.
- If any errors are returned from final processing, your CRM will reach out to assist with any additional issues.