

Wellbeats Eligibility File Upload Guide

INTRODUCTION

Clients with administrative credentials can load eligibility files through the Wellbeats *Wellness*, a product of LifeSpeak Inc., admin portal. Administrative credentials are provided to the client by Wellbeats *Wellness*. Please contact eligibility@wellbeats.com for assistance.

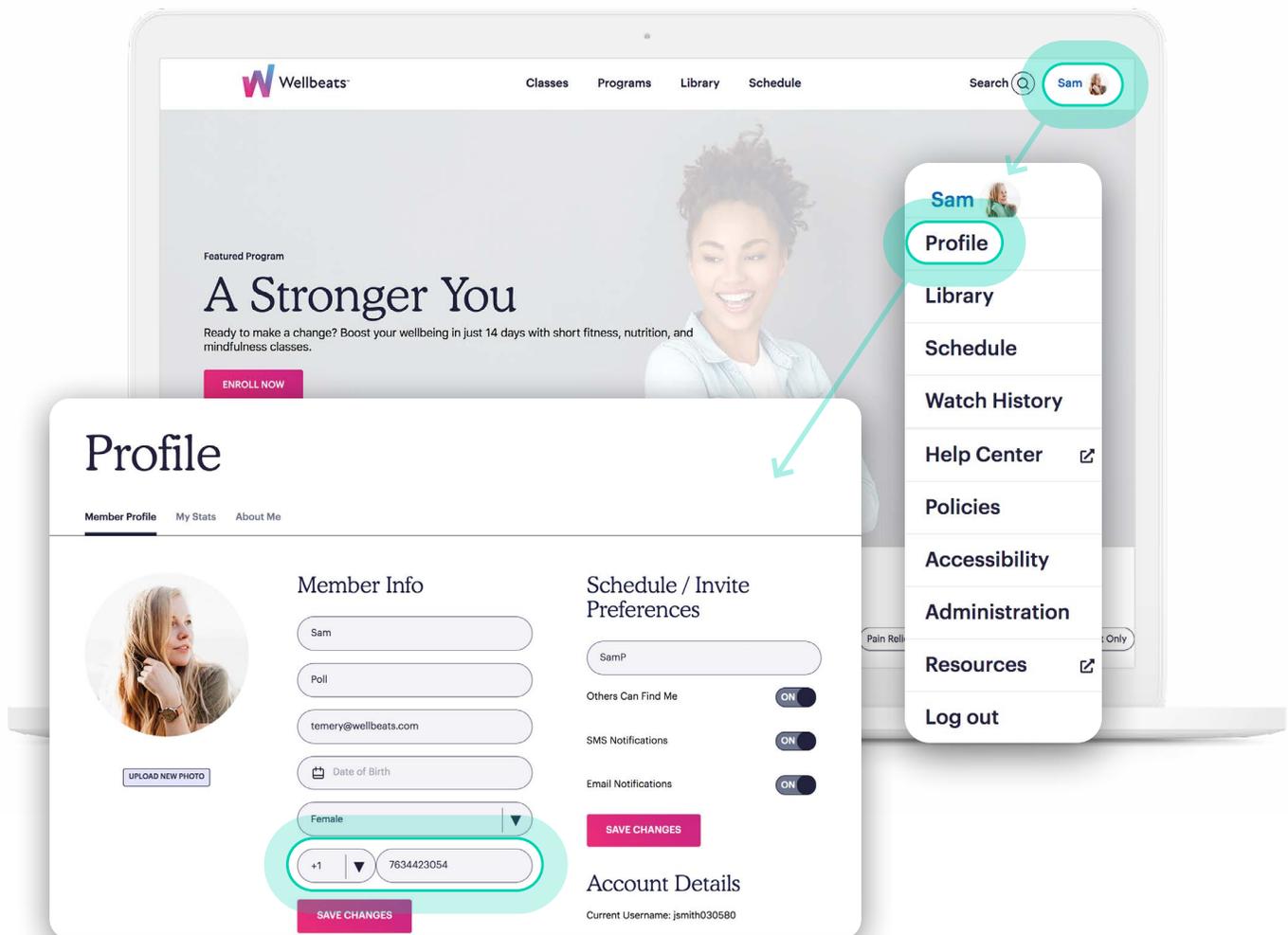
The admin portal is only available on a web browser. It cannot be accessed through the Wellbeats *Wellness* app.

Important: Before beginning this process, clients must ensure that they have followed all eligibility file specifications and configuration details agreed upon during implementation.

Update Your Member Profile

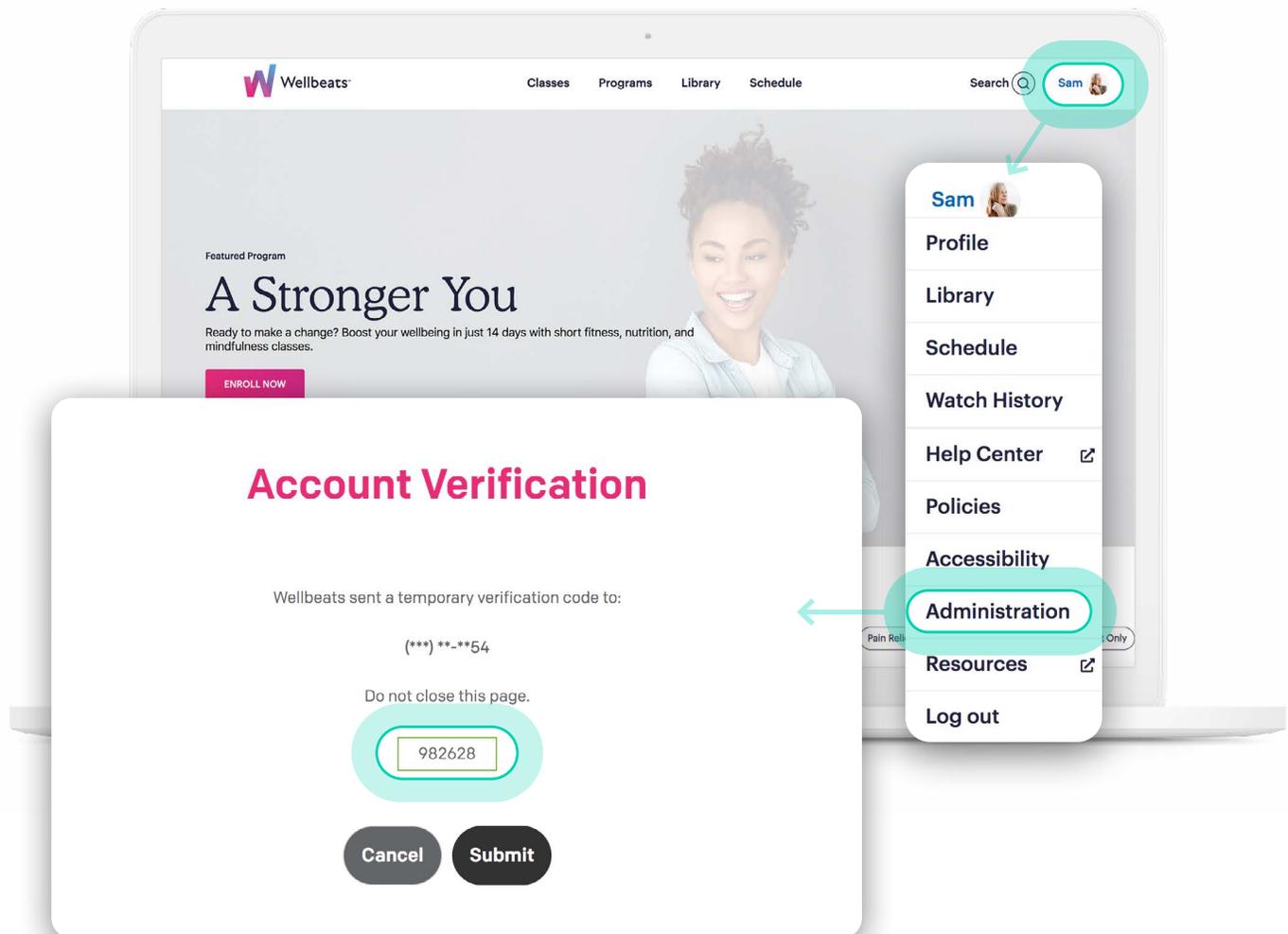
*Wellbeats *Wellness* requires two factor authentication in order to access the administrator portal. If you have not done so already, please follow these instructions to update your profile with the required information.

1. Go to <https://portal.wellbeats.com/>
 - Only accessible through a web browser not the app.
2. Login to your personal Wellbeats *Wellness* account.
3. Click your name in the top right of the screen.
4. Select Profile from the drop-down menu.
5. Update your Profile with your cell phone number and Save.



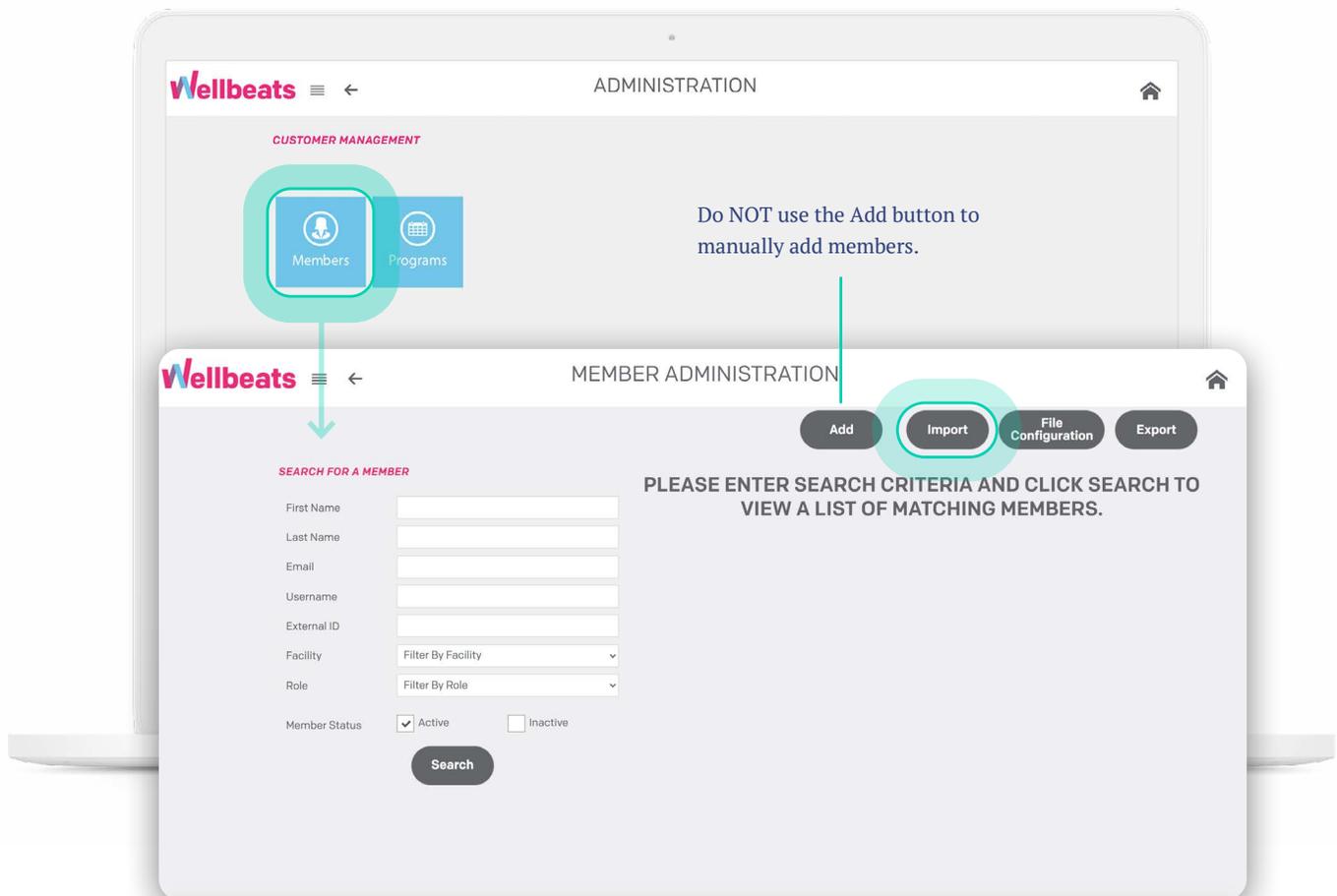
Accessing the Wellbeats Administrator Portal

1. Go to <https://portal.wellbeats.com/>
 - Only accessible through a web browser not the app.
2. Login to your personal Wellbeats *Wellness* account.
3. Select Administration from the drop-down menu on the top-right of the screen.
4. The Account Verification pop-up window will open.
 - Wellbeats *Wellness* requires two factor authentication to access the administrator portal.
 - A code will be sent to the mobile number on your profile. Enter the code in the box and click submit.
5. The Administration Portal page will automatically open.



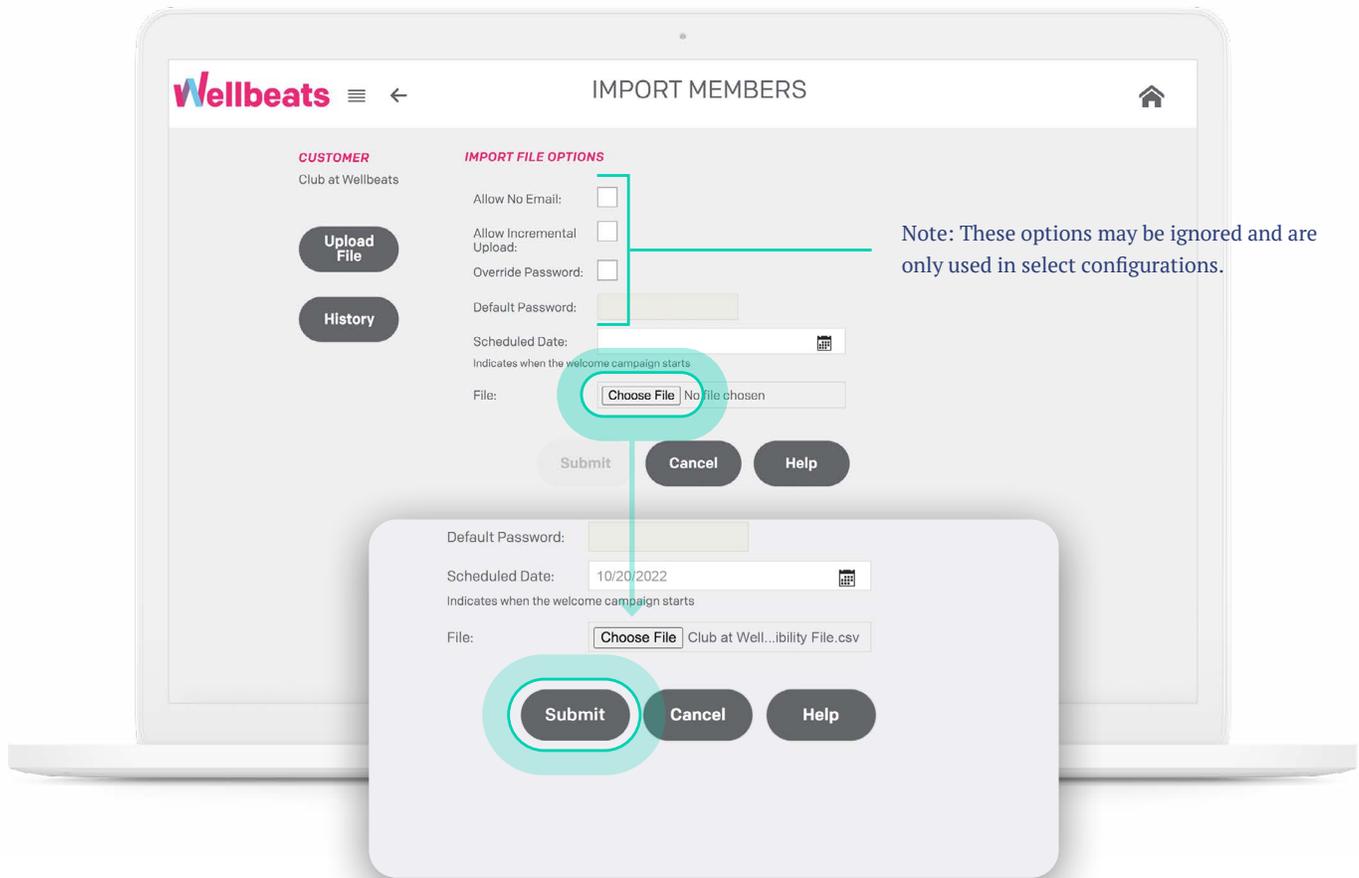
Wellbeats Member Administration

1. To access the Member Administration Screen, click the Members button.
 2. To upload an eligibility file, click Import.
- Export Note: To see a full view of Eligible (and ineligible) members click the Export button to download an eligibility file from the Wellbeats *Wellness* database. The format of the file in the export will be the same format to be used in uploading an eligibility file



Import Members Screen

1. Click the Calendar button.
2. Select today's date and click Close.
 - A later date can be selected if a delay in the first welcome email is desired.
3. Click Choose File.
4. Locate the eligibility file you would like to load and click open.
 - File will populate in the box and the Submit button will turn dark grey.
 - If Submit button does not activate, ensure that the file selected is a .csv or .txt.
5. Click Submit.



Import Members File Processing Screen

After clicking Submit, the Import Members file processing screen will open. As the file is processed by the Wellbeats *Wellness* database, it will move through different stages.

1. Stage 1: New

A new file has been submitted and is being processed. Clicking Refresh will move the process along.

2. Stage 2: Validated

The file has been validated and the pending results are displayed.

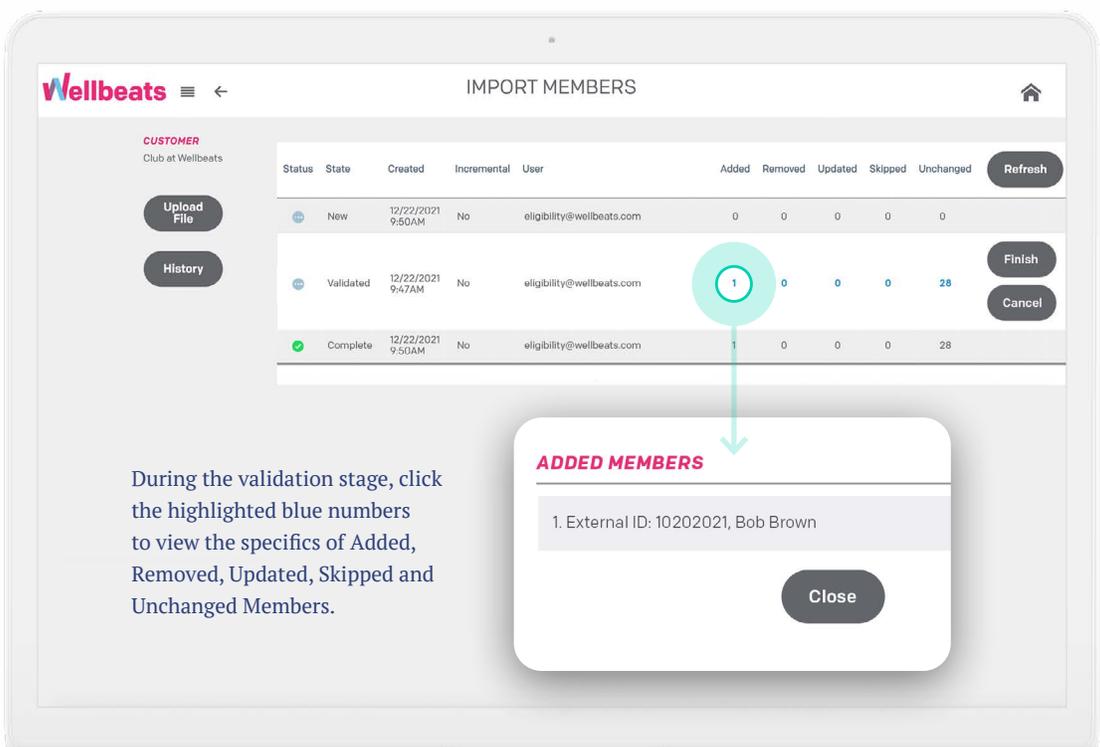
Review the results and click Finish if the results match your expectations.

If the pending results do not look correct, click Cancel.

3. Stage 3: Complete

The file upload has been completed. Any new members that were added will begin the Welcome Email campaign as set by you. Any members removed will be deactivated.

Important: You must click Finish at the Validated stage in order to move the file through completion.



During the validation stage, click the highlighted blue numbers to view the specifics of Added, Removed, Updated, Skipped and Unchanged Members.

Status	State	Created	Incremental	User	Added	Removed	Updated	Skipped	Unchanged	Refresh
New	New	12/22/2021 9:50AM	No	eligibility@wellbeats.com	0	0	0	0	0	Refresh
Validated	Validated	12/22/2021 9:47AM	No	eligibility@wellbeats.com	1	0	0	0	28	Finish Cancel
Complete	Complete	12/22/2021 9:50AM	No	eligibility@wellbeats.com	1	0	0	0	28	

ADDED MEMBERS

1. External ID: 10202021, Bob Brown

Close

Import Members File Processing Troubleshooting

Bad File Common Errors

- Click BadFile to open the Import Errors box for explanation.
- Incorrect, missing or additional Fields in the Header Row
- Commas within field rows on .csv files
- Additional “blank” fields on the file; this can occur when information is removed rather than deleted in entirety. Able to see this in notepad best.

Skipped Common Errors

- Duplicate and/or missing email addresses on file.
- Duplicate and/or missing Unique IDs on file.

The screenshot shows the 'IMPORT MEMBERS' interface in the Wellbeats system. The table displays the following data:

Status	State	Created	Incremental	User	Added	Removed	Updated	Skipped	Unchanged	Refresh
New		12/22/2021 9:50AM	No	eligibility@wellbeats.com	0	0	0	0	0	
Validated		12/22/2021 9:47AM	No	eligibility@wellbeats.com	1	0	0	0	28	Finish Cancel
Complete		12/22/2021 9:50AM	No	eligibility@wellbeats.com	1	0	0	0	28	
BadFile		10/20/2021 2:09PM	No	eligibility@wellbeats.com	0	0	0	0	0	

Below the table, there are two callout boxes:

- IMPORT ERRORS**
Member Import requested on 10/20/2021 7:09:27 PM (GMT) did not complete because the imported file contains column headers that do not match the import template. Please check the file and retry the import or contact eligibilityimport@wellbeats.com so we can help resolve this for you.
- ADDED MEMBERS**
 - External ID:, Karen Test
ExternalID do not exists in file
 - External ID: 5, Hank Doe
Duplicate ExternalIDs in File
 - External ID: 8544376, Wanda Smith
Duplicate Email in file

Support

ELIGIBILITY SUPPORT
eligibility@wellbeats.com

CLIENT & MEMBER SUPPORT
support@wellbeats.com
855-520-7500