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Client Data File Template Step-by-Step Guide

This document will provide you with guidance on how to complete the 'Client Data File Template' for processing.

Below is a list of mandatory fields to be completed prior to uploading the file to the SFTP. You will also find guidance on how to complete each field with guidelines of date and time formats.

Prior to completing the data template, it is important to take note of the following points:

1. Do not remove or rename any of the fields within the template. If fields are removed / column headings reworded once the file is uploaded to the SFTP it will be automatically rejected.

2. In this document we refer to NULL as an empty space, when information is not required please leave it blank.

3. In the examples provided below where capital letters are displayed, these words must be entered in capital letters when completing the template.

4. Columns labelled 'Number of dependants' and 'Plan type' cannot be used in conjunction with each other. If you specify the number of dependents the plan type field will need to be left blank. If you are specifying the plan type, then the 'Number of dependants' field will need to be left blank.

5. Any files which fail the validation rules will automatically be rejected for processing.

Column Name	Description	Validation Rules
EmailAddress	Members e-mail address, this is the e-mail address that DCA will use to send the members activation e-mail.	Employee company e-mail address to be provided.
UniqueReference	Employee ID number for each employee.	Company employee ID to be provided.
Forename	Name must be as member wishes to appear in DCA.	A-Z Characters allowed as well as '–' for double barrelled names. *i.e. Molly - Mae*
Surname	Name must be as member wishes to appear in DCA.	A-Z Characters allowed as well as '–' for double barrelled names. *i.e. Broughton - Lloyd*
Action	Specify the action against each employee.	List the action to be performed against each member: **NEW**– adding a new employee. **UPDATE** – updating information on an existing employee. **DELETE**– removing an employee. **FULL**– when supplying a full population file **What is a DELTA file?** The file is made up of a range of actions such as NEW, UPDATE and DELETE. **What is a FULL population file?** The file is made up of all employees who are entitled to the benefit. FULL must be listed in the action column. The action must be consistent with file type specified in file name.

DateOfBirth	Members date of birth.	DOB must be entered in American format *i.e. 1983-11-01.* Please ensure the date format within excel is set to American and under the type format you select the American date format.
ExpiryDate	If expiry date for policy is known in advance please enter in American format, if there is no expiry date, please enter NULL.	If specifying expiry date, it must be entered in American format *i.e. 2024-11-01* or must be left BLANK. Please ensure the date format within excel is set to American and under the type format you select the American date format.
PMIFlag	Is member eligible for PMI cover or not.	YES, NO or left BLANK.
NumberOf Dependants	Number of dependants will need to be populated if plan type is not being specified.	When completing number of dependants, it must be completed by entering a numeric number greater than 1 or NULL. If employees have '0' dependants, this field must be left BLANK.
ActivationCode	DCA automatically generate a unique activation for each member, if you prefer for members to use specific action codes please list them against each employee.	If you are supplying DCA with action codes, please ensure they are all unique.
PricingTier	DCA automatically generate a unique activation for each member, if you prefer for members to use specific action codes please list them against each employee.	If you are supplying DCA with action codes, please ensure they are all unique.

ActivationCode	DCA automatically generate a unique activation for each member, if you prefer for members to use specific action codes please list them against each employee.	If you are supplying DCA with action codes, please ensure they are all unique.
PricingTier	Not yet applicable NULL.	Not yet applicable. This section must be left BLANK.
PlanType	Plan type will need to be populated with the correct plan, if number of dependents is not being specified.	Specify the plan each member is on, please note only the following plans are accepted: Single Partner only Children only Family

How do I save the file?

The file will need to be saved as a text file by following the steps below:

- Choose **File->Save** as from the menu.
- In the 'Save as type' dropdown > select **'Text (Tab delimited) (*.txt)'**
- Select **'Web Options'** in the 'Tools' dropdown at the bottom of the dialog box.
- Select the **'Encoding'** tab.
- In the 'Save this document as:' dropdown, select **'Unicode (UTF-8)'**

File Naming Convention:

DCA require each client to save the file using a naming convention as the filename format, The information provided in the filename is critical to perform our validation checks. DCA will provide each client with a unique Company identifier.

Please see below guidance on how to save your file using the format that DCA require, please note if the format differs from the format below our system will automatically reject the file as it cannot be read by our systems:

1. **COMPANYIDENTIFIER** – DCA will provide you with a unique account number that must be used as a company identifier for all file names.
i.e. ACC-000011293

2. **FILETYPE** – the file type must be specified as **FULL** or **DELTA**

   a. A FULL population file is a refresh of data containing all employees eligible for DCA as a benefit.

   b. DELTA is made up of NEW, UPDATE, DELETE, adding new employees, removing employees and updates to existing members.

3. **DATE** - specify the date you are saving the file in American format
i.e. 2023_10_01 - please note single digits must be prefixed with a 0

4. **TIME** – specify the time you save the file in 24hour clock format, this must include, HOUR, MINUTES, SECONDS.
i.e. 18_53_22 - please note single digits must be prefixed with a 0

5. Once all the above steps have been followed, the file will automatically save as .TXT

Once you have saved the file it should like one of the examples below:

> ACC-000011293_FULL_2022_11_17_23_34_11.TXT
> ACC-000012304_DELTA_2022_11_17_23_34_11.TXT

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If you have any questions,

Please contact your account manager

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