

Ongoing Eligibility File Specifications



The Ongoing Eligibility file should contain one record (one row) for each employee and one column for each required field. All employees (**active and terminated**) should be included on the Eligibility File. The required fields are described in the table below.

File Type: Excel or CSV

Naming Preference: File Type, date posted


- Example: Eligibility File - 6.30.2018

Social Security Number (required)	The social security number should be formatted without dashes and should include leading zeroes (i.e. 012345678 or 001234567)
Last Name (required)	Up to 30 characters
First Name (required)	Up to 30 characters
Middle Name	Up to 30 characters
Address (required)	Up to 50 characters for the street address and apartment/ unit number
City (required)	Up to 20 characters for the city
State (required)	2 character state abbreviation
Zip Code (required)	5 characters or 10 characters including a dash
Marital Status	Up to 1 character
Gender	Up to 1 character
Race	Up to 30 characters
Phone (required)	10 character phone number including the area code
E-mail (required)	Up to 50 characters
Birth Date (required)	MM/DD/YYYY
Hire Date (required)	MM/DD/YYYY
Rehire Date (required)	MM/DD/YYYY
Termination Date (required)	MM/DD/YYYY
Job Position	Up to 30 characters
Salary (required)	Up to 9 characters and including a decimal point where appropriate
Payroll Frequency	Up to 5 characters. We prefer (M)onthly, (S)emi-Monthly, (B)i-weekly, or (W)eekly. If you have employees with identical payroll frequencies on separate schedules we suggest adding a number after the letter (i.e. M1 for monthly employees paid on the first of the month, M2 for monthly employees paid on the 15th of the month)

Secure FTP Site

Tutorial

1. From you Browser, go to <https://ftp.jemtpa.com>
2. Enter you credentials in the box below and click on Login.

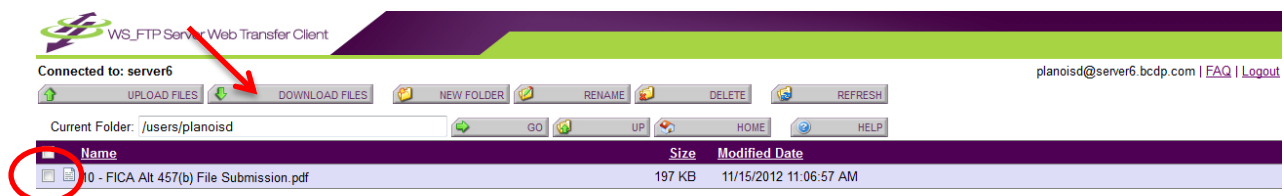


The login screen features the IPSWITCH logo and the text 'File Transfer WS_FTP Server Web Transfer Client'. It includes input fields for 'Username' and 'Password', a 'Language' dropdown menu set to 'English', a checkbox for 'Remember my password', and a 'Login' button.

3. You will see a screen similar to the one below – this screen shot has a sample file for you to view.
4. This is where TCG Advisors and your District will transfer sensitive data. This data includes:
 - a. Takeover files
 - b. Ongoing Payroll Files
 - c. Reports
 - d. Change reports (if applicable)

To Download Files from the FTP site to your Network

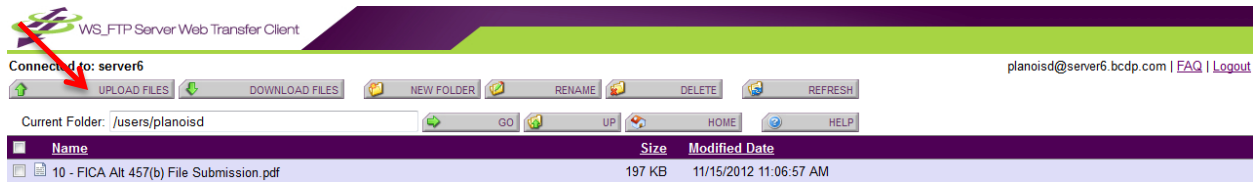
5. Select the box to the left of the file you are wanting to Save to your network and click on Download



6. The file will Open and you can Save to your Network for review.

To Upload Files from your Network to the FTP site

7. Click on Upload



8. A box like the one below will appear.

9. Browse your Network for the file you would like to Upload to the FTP site and select Upload

UPLOAD FILES

Click "Browse" to select a File. You can attach File(s) up to a total size of **50 MB**. The Files will be uploaded to **"/users/planoisd"** Folder.

☐ Overwrite selected Files on the server

File 1:

File 2:

File 3:

File 4:

File 5:

10. This action will post your files to the FTP site for TCG to download.