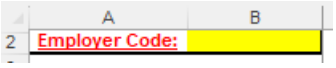
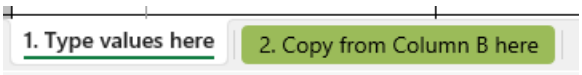
Demographic and Contract Record Import Instructions

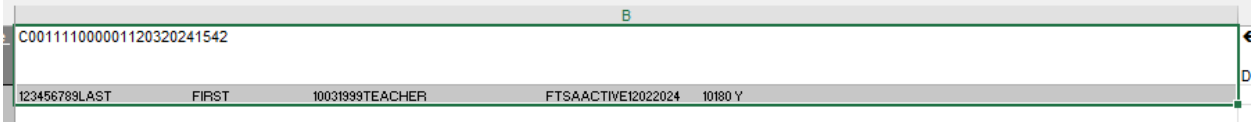
1: Make sure to enter your employer code in the top left corner (B2).



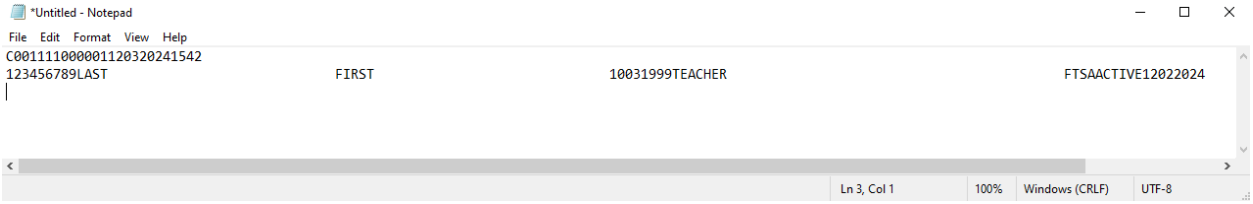
2: Enter Demographic and Contract info to the corresponding spreadsheet. **NOTE**: Work Status should be ACTIVE when entering new employees. BOC Flag, Service Flag, and BOC Date should be blank when adding an active contract record.

3: When info is entered, click sheet #2 at the bottom and copy anything in Column B. This should include the Header row.





4: Open the Notepad App and paste what you just copied to Notepad.



5: Click File and Save. **NOTE**: Do not use any special characters when naming files. This is the file you will upload into ESS.

6: Log into ESS and click on the Import Files Page. Click on Add Import in the top right corner.

7: Select the File Type (Member Demographic Import or Contract Import). Choose the file that you just saved to Notepad by clicking Browse. You may also add a description if you would like. Click Next and Confirm.

8: After the file is validated, click on the ID number to open the report. If there are errors, you will need to correct them by clicking Edit on the right side. After editing the row, you will need to save and validate to clear the error.

9: If there are no errors and all of the information is correct, click the three dots in the upper right corner and click Process.

10: To check that everything has been added correctly, look up the employee on the Roster Page. This will display the member's demographic and contract record.