



Eligibility File Specifications



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Introduction

LifeSpeak *Holistic Wellness*, provides clients with a set of primary required fields as well as a range of options when determining the specific configuration of the Eligibility File (EF). This document provides information about minimum requirements and various configuration options. During implementation, the LifeSpeak *Holistic Wellness* team will work with the client to determine the best configuration.

Eligibility Files are the mechanism that LifeSpeak *Holistic Wellness* uses to determine client fees and to give members access to the LifeSpeak *Holistic Wellness* product.

After initial consultation, LifeSpeak *Holistic Wellness* will complete the File Configuration Details Form and share with the client. The client is expected to review and confirm alignment via email. After the document has been agreed to, a test file will need to be provided.

Member Creation & Deactivation

- Eligibility files control member access to LifeSpeak *Holistic Wellness* by creating, maintaining, and deactivating member accounts.
- Every EF, including the initial launch file and all subsequent update files, must be FULL files containing all eligible members.
- Existing member accounts are deactivated by omission from a new eligibility file. Upon upload of a new EF, user accounts no longer on the file are automatically deactivated.
- Partial EF files should not be sent as existing member accounts are deactivated when omitted from any EF.

Secure File Transfer

LifeSpeak *Holistic Wellness* utilizes MoveIT™ a Managed File Transfer (MFT) software to securely receive and share files with clients. The LifeSpeak *Holistic Wellness* MFT offers both a user-friendly web interface as well as an SFTP option.

Please note LifeSpeak *Holistic Wellness* does NOT accept eligibility files via email or pick-up eligibility files from external sites.

LifeSpeak *Holistic Wellness* will provide one client contact with credentials to access the secure MFT platform.

Encryption

- LifeSpeak *Holistic Wellness* does not require file encryption, but provides the option to clients.
- File encryption is available offered in transit and at rest.
- Encrypted files require additional information, including IP address(es) for whitelisting and a PGP Encryption Key.
- Credentials and PGP Encryption Key for encrypted files are shared via encrypted email during implementation.

MOVEit complies with PCI, HIPAA, CCPA, GDPR, SOC 2 type 2, ISO 27001, SOX, BASEL I/II/III, FIPS, FISMA, GLBA, FFIEC, ITAR, and other data privacy regulations. Additional supporting documentation may be provided on request.

Initial Eligibility File Configuration Process

LifeSpeak *Holistic Wellness* allows for client specific configuration on certain data elements within the eligibility file. During implementation, the LifeSpeak *Holistic Wellness* team will review and consult with the client to complete the initial file configuration.

The LifeSpeak *Holistic Wellness* Eligibility File Configuration Details Form will be used to document the client specific configuration and capture important details related to file cadence, contacts, and other specifications.

The following are examples of configuration components that will be discussed:

Reporting

- Eligibility Files support reporting and can expand or limit what is available in client reports.
 - LifeSpeak *Holistic Wellness* does not provide reporting on demographic data that has been provided by the member to LifeSpeak *Holistic Wellness* in their personal profile.

Member Login Experience

- When email addresses are not available for all eligible members, LifeSpeak *Holistic Wellness* can use additional fields to provide an alternative login method.

Test File Requirements

- A test file must be provided to LifeSpeak *Holistic Wellness* 10 business days prior to launch.
- The LifeSpeak *Holistic Wellness* team will review and provide any necessary feedback. A secondary test file may be required to confirm client's and LifeSpeak *Holistic Wellness*' requirements will be met.
- Naming convention is required and will be identified on the LifeSpeak *Holistic Wellness* Configuration Details Form.

Production File Requirements

- A production file must be provided to LifeSpeak *Holistic Wellness* a minimum of 5 business days prior to launch date.
- Naming convention is required and will be identified on the LifeSpeak *Holistic Wellness* Configuration Details Form.

Eligibility File Specifications

Property	Details
Encryption	LifeSpeak <i>Holistic Wellness</i> does not require files to be encrypted.
Test File Naming Convention	TEST_Clientname_Eligibility_MMDDYYYY.csv
Production File Naming Convention	Clientname_Eligibility_MMDDYYYY.csv
Header Row	A header row is required and shall align with agreed upon field values in the LifeSpeak <i>Holistic Wellness</i> EF Configuration Details Form. Field Names must be exact match (spacing, case)
File Format Options	.csv or .txt
Field Delimiter Options	Standard: Comma, Optional: Pipe
Character Encoding	UTF-8, UTF-8-BOM
Double Quote Field Enclosure	No

Eligibility File Standard Rules

1. The Eligibility File may contain only one record per user.
2. Email:
 - a. Emails must be unique (no duplicates).
 - b. Spaces are not allowed in the Email field.
 - c. Subsequent eligibility files do NOT update the email.
3. Unique ID:
 - a. Value must be unique for each user (no duplicates).
 - b. Value must be non-publicly identifiable.
 - c. The Unique ID is set upon account creation via the eligibility file. It cannot be viewed or changed by the member.
 - d. Subsequent eligibility files do NOT update the Unique IDs.
 - e. Unique IDs must remain the same after account creation. Clients are required to notify LifeSpeak *Holistic Wellness* if this value is changing for any member prior to the change appearing in the eligibility file.
4. Username:
 - a. Values in the Username field must be unique for each user (no duplicates).
 - b. Minimum of 5 characters in the username field for direct access clients.
 - c. Minimum of 3 characters in the username field for SSO or Dual Login clients.
5. Passwords:
 - a. Members are required to create a unique password at first login.
6. Clients are required to provide clean Eligibility Files.
 - a. Errors will not be loaded into the LifeSpeak *Holistic Wellness* database and will result in member access issues.
 - b. Some errors may inhibit the entire file from being loaded.

Data Layout Table

	Field Name	Field Value/Description	Data Type Format Length	Allow Null/Blank
Required Fields	First Name	The user's first name. No commas.	Long Text Alpha 1-100	No
	Last Name	The user's last name. No commas.	Long Text Alpha 1-100	No
	Unique ID	An employer recognizable ID unique to each individual user. Example: Employee ID, Member ID	Short Text Alphanumeric	No
	Active Flag	Value = True for all records	Bit	Default: True
	Email	A work or personal email address unique to each user.	Long Text	*Conditional
	User Flag	For LifeSpeak <i>Holistic Wellness</i> internal processes. Must be used when including User Type and/or Global.	Null (Blank)	Yes
	User Type	Defines user's relationship to client. *Reference Table B for User Type Input	*User Type Table Options	No
Optional Fields	Report Group 1	Value defined as needed for reporting purposes. Examples: Location, Country, Region, Departments (HR, Finance, Ops)	Alphanumeric 1-50	Yes
	Report Group 2	Additional value used for reporting purposes.	Alphanumeric 1-50	Yes
	Report Group 3	Additional value used for reporting purposes.	Alphanumeric 1-50	Yes
Conditional Fields *Required if Email is not available.	Username	Username defined by client. Must be unique for each eligible user.	Long Text 5-350	*Conditional Default: Value in Email Field
	Password	Client determined preset password. Member required to update at first login.	Short Text	*Conditional
Conditional Fields *Required if population contains: Global Employees Spouses Dependents	Country	User's country of residence. Examples: US, Spain, Germany, Ireland	Alpha 1-20	No

Custom Data Fields

Custom Data fields may be added to the configuration during initial set-up if the standard fields do not allow for the necessary data inputs.

Post Launch Configuration Changes

Changes to the initial file configuration may be subject to additional fees.

Appendix

TABLE A: GENDER VALUE OPTIONS

LifeSpeak <i>Holistic Wellness</i> Gender Values	Eligibility Value Option 1	Eligibility Value Option 2
Female	F	0
Male	M	1
Prefer Not to Answer	NA	2
Transgender	T	3
Non-binary and/or non-confirming	NB	4

TABLE B: USER TYPE VALUE OPTIONS

LifeSpeak <i>Holistic Wellness</i> User Type Values	Eligibility Value Option 1	Eligibility Value Option 2
Employee	EE	0
Spouse	SP	1
Child (*must be 14+ years of age)	CH	2
Adult Dependent	AD	3
Other	OT	4
Retiree	RT	5