Archived Eligibility File Specs

We have moved to new Eligibility file specs. DO NOT use these specs anymore. Please reference Current Eligibility File Specs.

- File format
- Header Names
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Eligibility File Format (Effective March 1st, 2016)

The eligibility file determines who can join Retrofit through a company plan. The file should include everyone who is eligible and should not include anyone who is not eligible.

File format

- We only accept comma-delimited (also known as CSV) or pipe-delimited text files. The first line of the file **must** be a header row containing the names of the different fields in the file.
- The headers are case sensitive. Example: External ID, the ID must be in all capitals.

Example of Comma-Delimited Text

```
External ID,First Name,Last Name,Email,Eligibility Type
RF10000,Blake,Clark,blake.clark@example.com,Employee
RF10001,Gordon,Nolan,gordon.nolan@example.com,Employee
RF10002,Joseph,Bailey,joseph.bailey@example.com,Employee
RF10003,Audrey,Dyer,audrey.dyer@example.com,Dependent
RF10004,Jack,Harris,jack.harris@example.com,Dependent
```

Example of Pipe-Delimited Text

```
External ID|First Name|Last Name|Email|Eligibility Type
RF10000|Blake|Clark|blake.clark@example.com|Employee
RF10001|Gordon|Nolan|gordon.nolan@example.com|Employee
RF10002|Joseph|Bailey|joseph.bailey@example.com|Employee
RF10003|Audrey|Dyer|audrey.dyer@example.com|Dependent
RF10004|Jack|Harris|jack.harris@example.com|Dependent
```

Additionally, if you are submitting a comma-delimited file, we highly recommend that headers and values be enclosed in double quotation marks.

Example of Quotes for Comma-Delimited Text

```
"External Id","First Name","Last Name","Email","Eligibility Type"
"RF10000","Blake","Clark","blake.clark@example.com","Employee"
"RF10001","Gordon","Nolan","gordon.nolan@example.com","Employee"
"RF10002","Joseph","Bailey","joseph.bailey@example.com","Employee"
"RF10003","Audrey","Dyer","audrey.dyer@example.com","Dependent"
"RF10004","Jack","Harris","jack.harris@example.com","Dependent"
```

Header Names

 The exact names of all headers in your file must be provided to us in advance. Our system will reject the entire file if it does not recognize a header. Our system, however, is equipped to recognize 5 specific header names by default (External Id, First Name, Last Name, Email, Eligibility Type). If the header row of your file contains all of these headers and no other, and your file is a comma-delimited file, your file should not be rejected.

⚠

⚠️ Header names are case-sensitive. "EMAIL" is not considered the same as "Email".

Required headers

All files must contain headers for the following pieces of information:

- **A unique ID for each person (also known as the external ID):**

  - Default header name: External Id
  - There must be a value for each person in your file. Each person in your file must have a unique ID.
  - Our system uses this ID to uniquely identify people associated with your company.
  - Each person associated with your company will need to use their unique ID in order to gain access to their commitment form.
  - This field is case-insensitive. "RF10000" is the same as "rf10000".
  - Values must be unique for each person in the file. The system will reject the entire file if duplicates are detected.

  🛇 For privacy reasons, do not use a social security number (SSN) for the unique ID.

- **The person's first name:**
  - Default header name: First Name
  - There must be a value for each person in your file. Each person in your file must have a first name.
  - Valid characters are any capital or lowercase letter from A to Z, space ( ), period (.), apostrophe ('), and dash (-).

- **The person's last name:**
  - Default header name: Last Name
  - There must be a value for each person in your file. Each person in your file must have a last name.
  - Valid characters are any capital or lowercase letter from A to Z, space ( ), period (.), apostrophe ('), and dash (-).

- **The person's email address:**
  - Default header name: Email
  - Fields for this item may be left blank.
  - The inclusion of this field will facilitate the signup process.

- **The person's eligibility type :**
  - Default header name: Eligibility Type
  - Fields for this item may be left blank.
  - This field allows us to specify different Retrofit products and pricing for people in your eligibility file. Please talk to your Retrofit Account Manager for more details.
  - This field accepts the following values:

    1. Employee
    2. Dependent
    3. Consumer
    4. Custom1
    5. Custom2
    6. Custom3
  - If there is no value for this field, it will default to Employee.

Example Containing Required Headers with Some Fields Left Blank

```
"External Id","First Name","Last Name","Email","Eligibility Type"
"RF10000","Blake","Clark","blake.clark@example.com","Employee"
"RF10001","Gordon","Nolan",,"Dependent"
"RF10002","Joseph","Bailey",,
"RF10003","Audrey","Dyer","audrey.dyer@example.com","Consumer"
"RF10004","Jack","Harris","jack.harris@example.com",
```

Optional headers

The following headers and information are optional and facilitate the sign up process.

- **An address:**

  - Default header names:

- Street 1
- Street 2
- City
- State
- Postal Code
- Depending on the field, valid characters are any capital or lowercase letter from A to Z, space ( ), period (.), apostrophe ('), and dash (-).
- Street 2 is optional, all other fields must be present to construct a complete address.
- The inclusion of these fields will facilitate the signup process.

- **A phone number:**
  - Default header names:
    - Cell Phone
  - Valid characters for the phone number are the digits 0-9, no spaces ( ), periods (.), parenthesis (()), or dashes (-). Example of a correct phone number entry 8471234567.
  - The header name must contain one of the following values:

    - Cell (Ex. Cell Phone)
    - Mobile (Ex. Mobile Phone)
    - Home (Ex. Home Phone)
    - Work (Ex. Work Phone)
    - Office (Ex. Office Phone)
  - The header name categorizes the phone number into the appropriate type.
  - If there is no valid value for this header, it will default to 'Other'.
  - The inclusion of these fields will facilitate the signup process.

Custom headers and fields

Our system has the ability to handle custom headers and fields of your choice if you let us know in advance what they are and how we should handle them. We can either ignore the values or store them for your reporting needs. Some fields of interest to you may be information about the person's department, work location, or job type.

Custom fields may be left blank.

> ⚠️ If you should ever want reports based on, for example, departments, work locations, or job types, you must include these custom headers and fields in your eligibility file.

Example Containing Some Custom Headers and Fields

```
"External Id","First Name","Last Name","Email","Eligibility Type","Location","Department"
"10000","Blake","Clark","blake.clark@example.com","Employee","New York City","Accounts"
"10001","Gordon","Nolan",,"Dependent","San Francisco","Support"
"10002","Joseph","Bailey",,,"Cleveland",
"10003","Audrey","Dyer","audrey.dyer@example.com","Consumer",,
"10004","Jack","Harris","jack.harris@example.com",,,"Logistics"
```

File Upload Behavior

Adding, Updating, and Deactivating

When uploading an eligibility file, Retrofit will compare the people in the file to the people already in the eligibility system. People are identified by the unique ID.

- If a person exists in the file but not in Retrofit's eligibility system, then the person is added to the system and made eligible.
- If a person exists in the file and in Retrofit's eligibility system, then any changed fields are updated in the system. Also, if the person was previously ineligible in the system, then they are reactivated and made eligible again.
- If an eligible person exists in Retrofit's eligibility system but not in the file, then they are deactivated and made ineligible

> ⊘ Uploading a file containing only headers will deactivate all users.

Eligibility Dates

Effective dates and termination dates for eligibility are set to the upload date of the file.

For example, if a file is uploaded on January 1, 2014 and it contains a new user, then that user will have an effective date of January 1, 2014. Likewise, if another file is uploaded on February 1, 2014 and no longer contains that user, then that user will have a termination date of February 1, 2014.