Client Training HQ

How to Upload Files to Worxtime

Overview

This document overviews how to upload the Employee Demographic File, the Timesheet File, and the Coverage File to Worxtime, and submit the files to the Worxtime Data Team.

Accessing File Templates

To begin, access Worxtime and follow the steps below:

1. Select the file type from the following on the left navigation menu:
    a. **Employee Demographic File:** Go to the **Employees** tab and select **Upload Employees.**
    b. **Timesheet File:** Go to the **Timesheets** tab and select **Upload Timesheets.**
    c. **Coverage File:** Go to the **Compliance** tab and select **Upload Coverage.**

2. Download the **File Template** from the blue box at the top of the page.

Uploading Files for the Data Team

Users will upload files for the Data Team during implementation. The Data Team will then review the files for errors before they are uploaded to Worxtime and work with users to help remediate any issues. Once files are able to be uploaded correctly, the Upload Files to Data Team option will no longer be available.

To upload the file for the Data Team within Worxtime, follow these steps:

1. Select the file type from the following on the left navigation menu:
    a. **Employee Demographic File:** Go to the **Employees** tab and select **Upload File for Data Team.**
    b. **Timesheet File:** Go to the **Timesheets** tab and select **Upload File for Data Team.**
    c. **Coverage File:** Go to the **Compliance** tab and select **Upload File for Data Team.**

2. In the Upload box, click the black **Select File(s)** button.
3. Select the file from your local drive.

    Note: Check the **Send email when files are processed** to be notified when the files are processed into Worxtime.

4. Click the blue **Upload** button.
5. A green box will appear stating **"Your files have been uploaded"** if the file uploaded correctly.

A Data Team member will be in contact to discuss the file upload with you.

Uploading Files to Worxtime

After implementation, users will be able to directly upload files into Worxtime.

To upload files within Worxtime, follow these steps:

1. Select the file type from the following on the left navigation menu:
    a. **Employee Demographic File:** Go to the **Employees** tab and select **Upload Employees.**
    b. **Timesheet File:** Go to the **Timesheets** tab and select **Upload Timesheets.**
    c. **Coverage File:** Go to the **Compliance** tab and select **Upload Coverage.**

2. In the Upload box, click the black **Select File(s)** button.

    Note: For the Coverage File, you will also select the relevant **Tax Year** from the drop-down.

3. Select the file from your local drive.

    Note: Check the **'Send email when files are processed'** box to be notified when the files are processed into Worxtime.

4. Click the blue **Upload** button.

A green box will appear stating ***File Type*** **file(s) added to the queue** if the file is uploaded correctly.

The file will then appear in the Upload History tab under List of *File Type* Files in the Queue. Once the file is processed, it will appear in the *File Type* Queue History.

More Training Available!

Check out additional training resources available on our site, Connections.

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.