



Import Procedure for Enrollment Files

Overview:

Pet Assure accepts electronic enrollment files to expedite the enrollment process. Files should contain all active members. Pet Assure's system will automatically compare the list of members supplied by you against current members in the system and will activate any employee not yet in our system and terminate any member not on your list. It will also update name or address information based on the information you provide on the file. All the processing is based on Employee ID. You may use enrollment forms to provide us with additional member data, such as pet information. Please fax or mail the forms to us after sending the file.

File Format:

We accept files in Excel spreadsheet format or character delimited text format (ex: comma, pipe, not tab). Please include a header row to identify your columns. No other header or footer row should be included in the file (ie: no company name, no total records etc). Data is imported beginning with the second row. The fields do not need to be in any specific order.

File Delivery:

We accept files via email or via FTP. If using email, please email the file to memberupdates@petassure.com. If you are transferring via FTP, please send notifications to memberupdates@petassure.com when a file has been uploaded.

Fields:

The fields in red are required; all others are optional.

Field Name	Required?	Size
Prefix	No	20 characters
First Name	Yes	100 characters
Middle Initial	No	1 char
Last Name	Yes	100 characters
Address 1	Yes	100 characters
Address 2	Yes	100 characters
City	Yes	100 characters
State	Yes	2 characters
Zip	Yes	5 digits
Home Phone	Yes	15 characters
Work Phone	Preferred	15 characters
Email	No	70 characters
Employee ID *	Yes	20 characters
Effective Date	No	
Membership Type	No	1 for Lite, 0 or blank for full (only necessary if there are Lite members)



*-Employee ID's must remain consistent on all files. Any change in id numbers between files might result in members being activated or terminated in error. All future files will be compared based on the ID # field. You may use any id number you would like as the Employee ID, but the format should be consistent for all members. For example, if you are using a 5 digit Employee ID, all members on the file should have the 5 digit IDs in the same format. If using Social Security Numbers, please make sure they are all **9 digits**.