

Tips for Completing the CalSavers Census File Content

Do not change the format of any cell in the spreadsheet. Enter the information as shown.

<table border="1"> <thead> <tr> <th colspan="2">A</th> </tr> </thead> <tbody> <tr> <td>SSN/ITIN*</td> <td></td> </tr> <tr> <td>123456789</td> <td></td> </tr> <tr> <td>123-45-6789</td> <td></td> </tr> </tbody> </table>	A		SSN/ITIN*		123456789		123-45-6789		<p>SSN/ITIN must be 9 digits</p> <p>Example: 123456789 123-45-6789</p>												
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<table border="1"> <thead> <tr> <th>B</th> <th>C</th> </tr> </thead> <tbody> <tr> <td>First name*</td> <td>M.I.</td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <th>D</th> <th>E</th> </tr> <tr> <td>Last name*</td> <td>Suffix</td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>	B	C	First name*	M.I.					D	E	Last name*	Suffix					<p>Name Fields</p> <p>Enter first name, middle initial, last name, and suffix separately in their designated columns.</p>				
B	C																				
First name*	M.I.																				
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<table border="1"> <thead> <tr> <th colspan="2">F</th> </tr> </thead> <tbody> <tr> <td>Birthdate*</td> <td></td> </tr> <tr> <td></td> <td>1/1/1970</td> </tr> <tr> <td></td> <td>1/1/1970</td> </tr> <tr> <td></td> <td>1/1/1970</td> </tr> <tr> <td></td> <td>1/1/1970</td> </tr> <tr> <td></td> <td>1011970</td> </tr> </tbody> </table>	F		Birthdate*			1/1/1970		1/1/1970		1/1/1970		1/1/1970		1011970	<p>Birthdate can be in any of the following formats.</p> <p>Example: 01/01/1970 1/1/1970 01/1/1970 1/01/1970 01011970</p>						
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Physical City*	Physical State*																				
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<table border="1" data-bbox="256 449 565 638"> <thead> <tr> <th>L</th> </tr> </thead> <tbody> <tr> <td>Primary Phone*</td> </tr> <tr> <td>555-555-5555</td> </tr> <tr> <td>(555)-555-5555</td> </tr> <tr> <td>(555) 555 5555</td> </tr> <tr> <td>5555555555</td> </tr> </tbody> </table>	L	Primary Phone*	555-555-5555	(555)-555-5555	(555) 555 5555	5555555555	<p>Primary Phone The primary phone number is required and can be in any of the following formats. If you do not have an individual phone number, enter a business phone.</p> <p>Example: 555-555-5555 (555)-555-5555 (555) 555 5555 5555555555</p>														
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Primary Phone*																					
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M																					
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<table border="1" data-bbox="112 940 708 1339"> <thead> <tr> <th>N</th> <th>O</th> </tr> </thead> <tbody> <tr> <td>Mailing Address 1</td> <td>Mailing Address 2</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table> <table border="1" data-bbox="112 1077 708 1199"> <thead> <tr> <th>P</th> <th>Q</th> </tr> </thead> <tbody> <tr> <td>Mailing City</td> <td>Mailing State</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table> <table border="1" data-bbox="256 1203 565 1339"> <thead> <tr> <th>R</th> </tr> </thead> <tbody> <tr> <td>Mailing ZIP Code</td> </tr> <tr> <td> </td> </tr> <tr> <td> </td> </tr> </tbody> </table>	N	O	Mailing Address 1	Mailing Address 2					P	Q	Mailing City	Mailing State					R	Mailing ZIP Code			<p>Mailing Address Mailing address fields are optional. If a value is entered in any of the fields, you must provide a complete address.</p> <p>Example: 1 Main St Apt 1 Sacramento CA 94203-0001</p>
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<table border="1" data-bbox="256 1402 565 1570"> <thead> <tr> <th>T</th> </tr> </thead> <tbody> <tr> <td>External Payroll ID</td> </tr> <tr> <td>1ZG553YT</td> </tr> <tr> <td>1sypy7044d</td> </tr> <tr> <td>1DRe35uq668L5</td> </tr> </tbody> </table>	T	External Payroll ID	1ZG553YT	1sypy7044d	1DRe35uq668L5	<p>External Payroll ID This is an optional field. Entries must be 25 alphanumeric characters and contain no spaces.</p> <p>Example: 1ZG553YT 1sypy7044d 1DRe35uq668L5</p>															
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Tips for Completing the CalSavers Contribution File Content

<table border="1"> <thead> <tr> <th>A</th> <th>B</th> </tr> </thead> <tbody> <tr> <td>Last name</td> <td>First name</td> </tr> <tr> <td>Public</td> <td>John</td> </tr> </tbody> </table>	A	B	Last name	First name	Public	John	<p>Last Name & First Name Enter the first and last names separately in their designated columns.</p>
A	B						
Last name	First name						
Public	John						
<table border="1"> <thead> <tr> <th>C</th> </tr> </thead> <tbody> <tr> <td>SSN</td> </tr> <tr> <td>111633632</td> </tr> <tr> <td>444-84-6366</td> </tr> <tr> <td>888-44-111</td> </tr> </tbody> </table>	C	SSN	111633632	444-84-6366	888-44-111	<p>SSN/ITIN This field must be 9 digits.</p> <p>Example: 123456789 123-45-6789</p>	
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Contribution amount*							
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17.98							
0.00							
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CalSavers offers investment options selected by the Board. For more information on CalSavers’ investment options go to saver.calsavers.com. Account balances in CalSavers will vary with market conditions. Investments in CalSavers are not guaranteed or insured by the Board, the State of California, the Federal Deposit Insurance Corporation, or any other organization.

CalSavers is a completely voluntary retirement program. You may opt out at any time or reduce or increase the amount of your payroll contributions. If you opt out you can later opt back into CalSavers. Saving through an IRA will not be appropriate for all individuals. Employer facilitation of CalSavers should not be considered an endorsement or recommendation by your employer of CalSavers, IRAs, or the investment options offered through CalSavers. IRAs are not exclusive to CalSavers and can be obtained outside of the program and contributed to outside of payroll deduction. Contributing to a CalSavers IRA through payroll deduction offers some tax benefits and consequences. You should consult your tax or financial advisor if you have questions related to taxes or investments. Your employer does not provide financial advice and you should not contact your employer for financial advice. Employers are not liable for decisions employees make pursuant to Section 100034 of the California Government Code.

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