

Instructions for Adding Employees Using the Employee Information Template Excel File Format

Naming Standards

The file name you use will depend on how you plan to submit your file to the Program.

Uploading file in the Employer Portal

If you plan to upload your file to the Employer Portal, you can name your file however you would like. Here is one suggestion:

<Program Name>_<Payroll List Name>_<Date Created>.csv

Fields	Notes
Program Name	The name of the program
Payroll List Name	The name of your payroll list
Date Created	The date you upload the file to the Employer Portal

Example

CalSavers_SouthwestBranch_10222019.csv

Sending file via File Transfer Protocol (FTP)

If you plan to submit your file by FTP, you must use this naming standard.

<Program>_<EIN>_<EmployeeCensus/8X>_ASTRO_ExcelFmt_YYYYMMDD_HHMMSS_<sequence>_<Client specified>.csv

Fields	Notes
Program	The two digit state code. CA, IL or OR
EIN/BIN	Employer's federal identification number.
Employee Census	A string that identifies it as a census file. Valid values <ul style="list-style-type: none"> EmployeeCensus 8X
ASTRO	A string that is a reference to the internal name we use to reference our system.
ExcelFmt	The type of file you are sending. This indicates this file is of type CSV. Can be created by using "Save As" in an MS Excel file
Sequence	A number used to make the file unique. This must be a minimum of 4 digits in length and a maximum of 13 digits in length.
Client Specified	This field can contain anything that is useful to the sender of the file. This must be at least 1 digit in length.

Example

CA_97654321_EmployeeCensus_ASTRO_ExcelFmt_20180205_100205_1002_B8765.csv

Questions? We're here to help.



clientservices@ascensus.com.



1-855-650-6916. 8:00 am to 8:00 pm PT Monday through Friday

File Formats

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

* = Required field

<p>SSN/ITIN*</p> <ul style="list-style-type: none"> SSN/ITN is a required field and must be 9 digits Format must be ##### or ###-##-#### <p>Example: 123456789 123-45-6789</p>	<table border="1" style="margin-left: auto; margin-right: auto;"> <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																	
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123-45-6789																									
<p>Name Fields*</p> <p>Enter first name, middle initial, last name, and suffix separately in their designated columns.</p> <ul style="list-style-type: none"> The first name and last name fields are required. First name can contain letters, numbers and - . ' , M.I. can contain letters, numbers and . Last name can contain letters, numbers and - . ' , , Suffix must contain one of the following values: Jr. , Sr. , II , III , IV , Esq. 	<table border="1" style="margin-left: auto; margin-right: auto;"> <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												
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First name*	M.I.																								
D	E																								
Last name*	Suffix																								
<p>Birthdate*</p> <ul style="list-style-type: none"> Birthdate is required, Format must be MMDDYYYY or MM/DD/YYYY <p>Example: 01/01/1970 1/1/1970 01/1/1970 1/01/1970 01011970</p>	<table border="1" style="margin-left: auto; margin-right: auto;"> <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										
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<p>Physical Address*</p> <ul style="list-style-type: none"> These are required fields and must be the employee's physical residence, not a P.O. Box. Use the states two-letter postal code, not the full state name or any other abbreviation. Enter a 5-digit ZIP code with an optional 4-digit extension. Address 1 can contain letters, numbers and # & () - , <p>Example: 1 Main St Apt 1 Sacramento CA 94203-0001</p>	<table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>G</th> <th>H</th> </tr> </thead> <tbody> <tr> <td>Physical Address 1*</td> <td>Physical Address 2</td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <th>I</th> <th>J</th> </tr> <tr> <td>Physical City*</td> <td>Physical State*</td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <th colspan="2">K</th> </tr> <tr> <td colspan="2">Physical ZIP Code*</td> </tr> <tr> <td colspan="2"></td> </tr> <tr> <td colspan="2"></td> </tr> </tbody> </table>	G	H	Physical Address 1*	Physical Address 2					I	J	Physical City*	Physical State*					K		Physical ZIP Code*					
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K																									
Physical ZIP Code*																									

<p>Primary Phone*</p> <p>The primary phone number is required. 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>	<table border="1"> <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														
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(555)-555-5555																					
(555) 555 5555																					
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<p>Email</p> <p>E-mail address is optional. We will use employee email addresses to notify them about the program and their options for participation.</p> <p>If you do not have an email address for the employee, leave the field blank.</p> <ul style="list-style-type: none"> Format must be Alphanumeric plus the following special characters - @ There must be one and only 1 @ character 	<table border="1"> <thead> <tr> <th>M</th> </tr> </thead> <tbody> <tr> <td>Email</td> </tr> <tr> <td> </td> </tr> <tr> <td> </td> </tr> </tbody> </table>	M	Email																		
M																					
Email																					
<p>Mailing Address</p> <p>Mailing address fields are optional. If a value is entered in any of the fields, you must provide a complete address.</p> <ul style="list-style-type: none"> Use the states two-letter postal code, not the full state name or any other abbreviation. Enter a 5-digit ZIP code with an optional 4-digit extension. Address 1 can contain letters, numbers and # & () - , <p>Example: 1 Main St Apt 1 Sacramento CA 94203-0001</p>	<table border="1"> <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"> <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"> <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		
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<p>External Payroll ID</p> <p>This is an optional field. Entries must be no more than 25 alphanumeric characters and contain no spaces.</p> <p>Example: 1ZG553YT 1sypy7044d 1DRe35uq668L5</p>	<table border="1"> <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															
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Instructions for Adding Contributions Using the Employee Contribution Information Template Excel File Format

Naming Standards

The file name you use will depend on how you plan to submit your file to the Program.

Uploading file in the Employer Portal

If you plan to upload your file to the Employer Portal, you can name your file however you would like. Here is one suggestion:

<Program Name>_<Payroll List Name>_<Date Created>.csv

Fields	Notes
Program Name	The name of the program
Payroll List Name	The name of your payroll list
Date Created	The date you upload the file to the Employer Portal

Example

CalSavers_SouthwestBranch_10222019.csv

Sending file via File Transfer Protocol (FTP)

If you plan to submit your file by FTP, you must use this naming standard.

<Program>_<EIN>_<EmployeeDeduction/9X>_ASTRO_ExcelFmt_YYYYMMDD_HHMMSS_<sequence>_<Client specified>.csv

Fields	Notes
Program	The two digit state code. CA, IL or OR
EIN/BIN	Employer's federal identification number.
Employee Deduction	A string that identifies it as a contribution file. Valid values <ul style="list-style-type: none"> EmployeeDeduction 9X
ASTRO	A string that is a reference to the internal name we use to reference our system.
ExcelFmt	The type of file you are sending. This indicates this file is of type CSV. Can be created by using "Save As" in an MS Excel file
Sequence	A number used to make the file unique. This must be a minimum of 4 digits in length and a maximum of 13 digits in length.
Client Specified	This field can contain anything that is useful to the sender of the file. This must be at least 1 digit in length.

Example

CA_97654321_EmployeeDeduction_ASTRO_ExcelFmt_20180205_100205_1002_B8766.csv

File Formats

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

* = Required field

<p>Last Name & First Name</p> <p>Enter the first and last names separately in their designated columns.</p>	<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
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Last name	First name						
Public	John						
<p>SSN/ITIN*</p> <ul style="list-style-type: none"> SSN/ITN is a required field and must be 9 digits Format must be ##### or ###-##-#### Each SSN in the upload file must match an SSN in the payroll list. <p>Example: 123456789 123-45-6789</p>	<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	
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SSN							
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444-84-6366							
888-44-111							
<p>Contribution Amount*</p> <ul style="list-style-type: none"> Contribution amount is required. Dollar amount must be in nn.nn format. Do not include the dollar sign (\$). 0.00 is a valid amount Contribution amount must be a valid decimal greater than or equal to 0. <p>Example: 104.82 2.53 31.00</p>	<table border="1"> <thead> <tr> <th>D</th> </tr> </thead> <tbody> <tr> <td>Contribution amount*</td> </tr> <tr> <td>52.30</td> </tr> <tr> <td>17.98</td> </tr> <tr> <td>0.00</td> </tr> </tbody> </table>	D	Contribution amount*	52.30	17.98	0.00	
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