Formatting Instructions
Using the Employee Information Template

Use these instructions to fill out the Employee Information Template. If you experience a file error, it can usually be resolved by ensuring the formatting in your MS EXCEL file conforms to these instructions. If you continue to experience issues, contact Client Services for support.

Naming Standards

You can name your employee information file however you would like.

Here is a suggested approach:

<Program Name>_<Employee Information File Name>_<Date Created>.xlsx

Fields	Notes
Program Name	The name of the retirement savings program
Employee Information File Name	The name of your Employee information file
Date Created	The date you upload your file to the Employer Portal
.xlsx	Save your EXCEL file as a .xlsx file.

Example: CalSavers_SouthwestBranch_04092023.xlsx

Formatting your Employee Information Template (.XLSX) File

Do not change the format of any cell in the spreadsheet. It is important that you enter the information as shown or your file will not be loaded correctly.

* = Required field

Excel Column	Notes
SSN/ITIN* **A** SSN/ITIN* 123456789 123-45-6789	SSN/ITN is a required field and must be 9 digits ▪ Format must be ######### or ###-##-#### <u>Example:</u> 123456789 123-45-6789
Name Fields* **B** First name* **C** M.I. **D** Last name* **E** Suffix	Enter first name, middle initial, last name, and suffix separately in their designated columns. ▪ The first name and last name fields are required. ▪ First name can contain letters, numbers and the following symbols: dash (-), period (.), & apostrophe (') ▪ M.I. can contain letters, numbers and period (.) ▪ Last name can contain letters, numbers and the following symbols: dash (-), period (.), apostrophe ('), & comma (,) ▪ Suffix must contain one of the following values: *Jr. , Sr. , II , III , IV , Esq.*
Birthdate* **F** Birthdate* 1/1/1970 1/1/1970 1/1/1970 1/1/1970 1011970	Birthdate is a required field ▪ Format must be MMDDYYYY or MM/DD/YYYY <u>Example:</u> 01/01/1970 1/1/1970 01/1/1970 1/01/1970 01011970
Physical Address* **G** Physical Address 1* **H** Physical Address 2 **I** Physical City* **J** Physical State* **K** Physical ZIP Code*	These are required fields and must be the employee's physical residence, <u>not</u> 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. ▪ Physical Address can contain letters, numbers and the following symbols: number sign (#), `fr ujwxfsi%&),` parenthesis [( )], dash (-), & comma (,) <u>Example:</u> 1 Main St | Apt #1 | Sacramento | CA | 94203-0001

Need Assistance?

📱 855-650-6916   ✉ clientservices@calsavers.com   🕐 Monday – Friday 8 a.m. – 8 p.m. PT

Primary Phone*	The primary phone number is required. If you do not have an individual phone number, enter a business phone.

L
Primary Phone*
555-555-5555
(555)-555-5555
(555) 555 5555
5555555555

Example:
555-555-5555
(555)-555-5555
(555) 555 5555
5555555555

Email

M
Email

E-mail is optional. However, employers are required to provide it, if it is available.
- An email address is the preferred form of communication as it reduces paper expense
  and eliminates delays associated with ground mail.
- We will use employee email addresses to notify employees about the program and their options for participation.
- If you do not have an email address for the employee, leave the field blank.
- Format must be Alphanumeric plus the following special character: @
- There must be one and only 1 @ character

Mailing Address

N	O
Mailing Address 1	Mailing Address 2

P	Q
Mailing City	Mailing State

R
Mailing ZIP Code

Mailing address fields are optional. If a value is entered in any of the fields, you must provide a complete address.
- 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.
- Physical Address can contain letters, numbers and the following symbols: number sign (#), `fr ujwxfsi%&`), parenthesis [( )], dash (-), & comma (,)

Example:
1 Main St | Apt #1 | Sacramento | CA | 94203-0001

External Payroll ID

T
External Payroll ID
1ZG553YT
1sypy7044d
1DRe35uq668L5

This is an optional field and is used to align you rpayroll system with your employee information entry. Entries must be no more than 25 alphanumeric characters and contain no spaces.

Example:
1ZG553YT
1sypy7044d
1DRe35uq668L5

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