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.

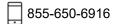
Example: CalSavers_SouthwestBranch_04092023.xlsx

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*		SSN/ITN is a required field and must be 9 digits Format must be ###################################
А		
SSN/ITIN*		Example:
123456789		123456789
123-45-6789		123-45-6789
Nome Fields*		Enter first name, middle initial, last name, and suffix
Name Fields*		separately in their designated columns. The first name and last name fields are required.
В	С	First name can contain letters, numbers and the following
First name*	M.I.	symbols: dash (-), period (.), & apostrophe (')
		M.I. can contain letters, numbers and period (.)
D	E	Last name can contain letters, numbers and the following
Last name*	Suffix	symbols: dash (-), period (.), apostrophe ('), & comma (,)
		Suffix must contain one of the following values:
		Jr., Sr., II, III, IV, Esq.
Birthdate*		Birthdate is a required field
		 Format must be MMDDYYYY or MM/DD/YYYY
F		Example:
Birthdate*	/4.070	01/01/1970
1/1/1970		
1/1/1970		1/1/1970
1/1/1970		01/1/1970
1/1/1970		1/01/1970
10	11970	01011970
Physical Address*		These are required fields and must be the employee's
		physical residence, <u>not</u> a P.O. Box.
G	Н	 Use the states two-letter postal code, not the full state
Physical Address 1*	Physical Address 2	name or any other abbreviation.
, 5.55.7.15.61.000 1	, 5.52	 Enter a 5-digit ZIP code with an optional 4-digit extension.
		 Physical Address can contain letters, numbers and the
Т	ı	following symbols: number sign (#), fr ujwxfsi%&),
I Physical City*	Physical State*	parenthesis [()], dash (-), & comma (,)
rnysical City	rnysical state*	(,, 5, 55,
		Example:
K		1 Main St Apt #1 Sacramento CA 94203-0001
Physical ZIP Code*		
,		





Primary Phone* The primary phone number is required. If you do not have an individual phone number, enter a business phone. Example: Primary Phone* 555-555-5555 555-555-5555 (555)-555-5555 (555)-555-5555 (555) 555 5555 (555) 555 5555 555555555 555555555 **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 Μ as it reduces paper expense Email 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** 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 Ν O name or any other abbreviation. Mailing Address 1 Mailing Address 2 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%&), Q parenthesis [()], dash (-), & comma (,) Mailing City Mailing State Example: 1 Main St | Apt #1 | Sacramento | CA | 94203-0001 R Mailing ZIP Code **External Payroll ID** 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. External Payroll ID 1ZG553YT Example: 1sypy7044d 1ZG553YT 1DRe35uq668L5 1sypy7044d 1DRe35uq668L5

