

Formatting Tips for Uploading Employee Information Using the Employee Information Template

MS EXCEL (.CSV) File Format

Naming Standards

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

Here is a suggested approach:

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

Fields	Notes
Program Name	The name of the retirement savings program
Employee List Name	The name of your employee (payroll) list
Date Created	The date you upload the file to the Employer Portal
.csv	Save your EXCEL file as a .csv (comma delimited) file.

Example: CalSavers_SouthwestBranch_04092020.csv

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Formatting your Employee Information Template 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

<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"> <thead> <tr> <th>A</th> </tr> </thead> <tbody> <tr> <td>SSN/ITIN*</td> </tr> <tr> <td>123456789</td> </tr> <tr> <td>123-45-6789</td> </tr> </tbody> </table>	A	SSN/ITIN*	123456789	123-45-6789																
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<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"> <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> </tbody> </table> <table border="1"> <thead> <tr> <th>D</th><th>E</th> </tr> </thead> <tbody> <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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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"> <thead> <tr> <th>F</th> </tr> </thead> <tbody> <tr> <td>Birthdate*</td> </tr> <tr> <td>1/1/1970</td> </tr> <tr> <td>1/1/1970</td> </tr> <tr> <td>1/1/1970</td> </tr> <tr> <td>1/1/1970</td> </tr> <tr> <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"> <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> </tbody> </table> <table border="1"> <thead> <tr> <th>I</th><th>J</th> </tr> </thead> <tbody> <tr> <td>Physical City*</td><td>Physical State*</td> </tr> <tr> <td> </td><td> </td> </tr> <tr> <td> </td><td> </td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>K</th> </tr> </thead> <tbody> <tr> <td>Physical ZIP Code*</td> </tr> <tr> <td> </td> </tr> <tr> <td> </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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<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"> <tr><th>L</th></tr> <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> </table>	L	Primary Phone*	555-555-5555	(555)-555-5555	(555) 555 5555	5555555555														
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<p>Email</p> <p>E-mail is optional. However, employers are required to provide it, if it is available. We will use employee email addresses to notify employees 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"> <tr><th>M</th></tr> <tr><td>Email</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>	M	Email																		
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<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 state's 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"> <tr> <th>N</th> <th>O</th> </tr> <tr> <td>Mailing Address 1</td> <td>Mailing Address 2</td> </tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </table> <table border="1"> <tr> <th>P</th> <th>Q</th> </tr> <tr> <td>Mailing City</td> <td>Mailing State</td> </tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </table> <table border="1"> <tr><th>R</th></tr> <tr><td>Mailing ZIP Code</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </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"> <tr><th>T</th></tr> <tr><td>External Payroll ID</td></tr> <tr><td>1ZG553YT</td></tr> <tr><td>1sypy7044d</td></tr> <tr><td>1DRe35uq668L5</td></tr> </table>	T	External Payroll ID	1ZG553YT	1sypy7044d	1DRe35uq668L5															
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