

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: ILSC_SouthwestBranch_04092023.xlsx

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 855-650-6914

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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																										
SSN/ITIN* <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	SSN/ITN is a required field and must be 9 digits <ul style="list-style-type: none"> Format must be ##### or ###-##-#### <p><u>Example:</u> 123456789 123-45-6789</p>																				
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Name Fields* <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					Enter first name, middle initial, last name, and suffix separately in their designated columns. <ul style="list-style-type: none"> 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: <i>Jr. , Sr. , II , III , IV , Esq.</i> 								
B	C																									
First name*	M.I.																									
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Birthdate* <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	Birthdate is a required field <ul style="list-style-type: none"> Format must be MMDDYYYY or MM/DD/YYYY <p><u>Example:</u> 01/01/1970 1/1/1970 01/1/1970 1/01/1970 01011970</p>																	
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
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<p>Primary Phone*</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	<p>The primary phone number is required. If you do not have an individual phone number, enter a business phone.</p> <p><u>Example:</u> 555-555-5555 (555)-555-5555 (555) 555 5555 5555555555</p>																		
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<p>Email</p> <table border="1"> <tr><th>M</th></tr> <tr><td>Email</td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>	M	Email			<p>E-mail is optional. However, employers are required to provide it, if it is available.</p> <ul style="list-style-type: none"> ▪ 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 																				
M																									
Email																									
<p>Mailing Address</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> <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> <tr><th>R</th><td></td></tr> <tr><td>Mailing ZIP Code</td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </table>	N	O	Mailing Address 1	Mailing Address 2					P	Q	Mailing City	Mailing State					R		Mailing ZIP Code						<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. ▪ Physical Address can contain letters, numbers and the following symbols: number sign (#), ampersand (&), parenthesis [()], dash (-), & comma (,) <p><u>Example:</u> 1 Main St Apt #1 Springfield IL 62629</p>
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<p>External Payroll ID</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	<p>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.</p> <p><u>Example:</u> 1ZG553YT 1sypy7044d 1DRe35uq668L5</p>																			
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