

Match File Specification

Introduction

Purpose

The Match File Specification is a resource to instruct users on how to produce a Match File and interpret processing results (Match File Response File). Match Files are a way to query CalSTRS system for information on members within the new Secure Employer Website. This document provides the layouts of inbound Match File and outbound Match File Response File.

The Match File is a query process where a request file is submitted that contains a birth date and Tax ID for each member queried on. Up to 100,000 records can be submitted on a request file. This makes the Match File an ideal way to obtain Client Identification numbers for an entire employee population.

For each birthdate and tax identification submitted, a Response File in CSV format will generate that contains the Client Identification number as well as additional demographic and member status information. Response files contain column headings.

Match files must be submitted in a text file format (i.e., .TXT).

Version

Version 1.2 – 05/14/2020

Support

For assistance contact Employer Services:

- By Email at EmployerHelp@CalSTRS.com
- By Phone at 1-877-277-5778

Version Updates

Field Affected	Description of Changes	See Page
Field 1	Field requirements changed from 4 to 9 numeric characters and the description updated to match requirements	4
Field 12	Field 12 – Member Type End Date removed from document	6
Field 13	Field 13 – Account Status renumbered to Field 12	6
Field 14	Field 14 – Status Effective Date removed from document	6
Field 15	Field 15 – Organization renumbered to Field 13	6

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Match File Layout

Field Position 1 – SSN/Tax ID

This field is required and must be nine numeric characters.

Format	Description
Numeric	SSN/Tax ID or person query

Field Position 2 - Birthdate

This field is required.

Format	Description
CCYYMMDD	Date of birth of person query

Match File Response File Layout

Field Position 1 – SSN

Format	Description
Nine numeric characters	SSN/Tax ID of the person received on the inbound file

Field Position 2 – Birth Date

Format	Description
MM/DD/YYYY	Birthdate of the person received on the inbound file

Field Position 3 – Tax ID Exists Indicator

Code Value	Description
Y or N	Identifies whether the SSN/Tax ID exists in CalSTRS system

If Value = Y indicates that the Tax ID exists in CalSTRS system.

If value = Y and all subsequent field data for that record are null, then the Tax ID exists in CalSTRS system, but the Birth Date given in the request file does not match the Birth Date in CalSTRS system.

If Value = N indicates that the Tax ID does not exist in CalSTRS system.

Field Position 4 – Client ID

Format	Description
Up to 10 numeric characters	CalSTRS Client ID obtained from Account Holder information in CalSTRS system

Field Position 5 – Last Name

Format	Description
Up to 50 nonnumeric characters	Last Name stored in CalSTRS system

Field Position 6 – First Name

Format	Description
Up to 50 nonnumeric characters	First Name stored in CalSTRS system

Field Position 7 – Middle Initial

Format	Description
One nonnumeric character	Middle Initial stored in CalSTRS system

Field Position 8 –Benefit Program

Associated benefit program obtained for the Client information in CalSTRS system.

Code Value	Description
CalSTRS Defined Benefit	CalSTRS Defined Benefit
CalSTRS Cash Balance	CalSTRS Cash Balance

Field Position 9 – Tier

Associated benefit structure for the Client information in CalSTRS system.

Code Value	Description
DB 2% at 60	DB 2% at 60
DB 2% at 62	DB 2% at 62
CB Participant	CB Participant
CB Participant PEPRA	CB Participant PEPRA

Field Position 10 – Member Type

Associated member type obtained for the Client information in CalSTRS system.

Code Value	Description
ARP	Alternative Retirement Program
Classified	Classified
Member 2% at 60	Member 2% at 60
Member 2% at 62	Member 2% at 62
Member 2% at 60 Supplement	Member 2% at 60 Supplement
Member 2% at 62 Supplement	Member 2% at 62 Supplement
Non-Member 2% at 60	Non-Member 2% at 60
Non-Member 2% at 62	Non-Member 2% at 62
Non-Member CB Regular	Non-Member CB Regular
Non-Member CB PEPRA	Non-Member CB PEPRA
Non-Classified	Non-Classified
Non-Member 2% @ 60 Supplement	Non-Member 2% @ 60 Supplement
Non-Member 2% @ 62 Supplement	Non-Member 2% @ 62 Supplement
Member CB Regular	Member CB Regular
Member CB PEPRA	Member CB PEPRA

Field Position 11 – Member Type Start Date

Format	Description
MM/DD/YYYY	Associated member type start date obtained for the Client information in CalSTRS system

Field Position 12 – Account Status

Associated account status obtained for the Client information in CalSTRS system.

Code Value	Description
Active	Active
Closed	Closed
Deceased	Deceased
Disabled	Disabled
Non-Contributing	Non-Contributing
Retired	Retired
Retired Deceased	Retired Deceased
Unclaimed	Unclaimed
Withdrawn	Withdrawn
Redeposited	Redeposited
Partially Redeposited	Partially Redeposited

Field Position 13 – Organization

Format	Description
Organization code and name (e.g., 37050 - San Diego Unified School District)	Associated organization code and name (e.g., 37050 - San Diego Unified School District) for the Client information in CalSTRS system