

Match File Specification

Overview

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).

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Support For assistance contact Employer Services:

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

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Match File Layout

Field Position 1 This field is required and must be nine numeric characters.

	Format	Description
SSN/Tax ID	Numeric	SSN/Tax ID or person query

Field Position 2 This field is required.

	Format	Description
Birthdate	CCYYMMDD	Date of birth of person query

Match File Response File Layout

Field Position

1

Last 4 SSN

Format	Description
Four numeric characters	Last four digits of 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

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Match File Response File Layout, Continued

**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

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Match File Response File Layout, Continued

Field Position 10 Associated member type obtained for the Client information in CalSTRS system.

Member Type

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

Member Type End Date

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

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Match File Response File Layout, Continued

Field Position 13 Associated account status obtained for the Client information in CalSTRS system.

Account Status

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 14

Status Effective Date

Format	Description
MM/DD/YYYY	Associated account status effective date obtained for the Client information in CalSTRS system

Field Position 15

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
