

Employee Match File Specification

Introduction

Purpose

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

The Employee Match File is a fixed positional request file in TXT format containing a birth date and Tax ID for each employee queried. Up to 100,000 records can be submitted on a request file. This makes the Employee Match File an ideal way to obtain Client Identification numbers for an entire employee population.

When an Employee Match File is submitted, a Response File in CSV format with tilde (~) field separators will generate that contains the Client Identification number as well as additional demographic and employee status information for each birthdate and tax identification number submitted. Response files contain column headings.

Version

Version 1.3 – 02/12/2021

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 |

Version 1.4 – 12/1/2021

Updated the Employee Match File Response File layout field format from MM/DD/YYYY to CCYYMMDD for the following Field Positions.

- In Field Position 2 – Birth Date
- In Field Position 11 – Member Type Start Date

Ancillary File Types

There are two ancillary and requisite data files to Employee Match File inquiries. The success of Employee Match File inquiries could be dependent on the data submitted on the following files:

| File | Description |
|-------------------|--|
| Employment File | Used to report employment type transactions such as Enrollments, Terminations, Leave of Absence, Contact Information Change, Annual Total Compensation, Annual Excess Sick Leave Awarded, Reduction in School Funds and Sick Leave |
| Contribution File | Used for payroll-type transactions such as Regular, Adjustments, Retroactive Payrates and Account Receivables |

See the Employer Support Portal for more information on the individual *Contribution File Specification* and *Employment File Specification* documents.

Support

For assistance contact Employer Help:

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

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Employee Match File Layout

Field Position 1 – SSN/Tax ID

This field is required and must be nine numeric characters. Must not begin with 9.

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

Field Position 2 - Birthdate

This field is required.

| Format | Description |
|------------------------------|-------------------------------|
| CCYYMMDD (i.e., 20180801) | Date of birth of person query |

Employee 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 |
|----------|--|
| CCYYMMDD | 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 of person 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 |
|---------------|---|
| CCYYMMDD | 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 |