

Employment File Template Instructions

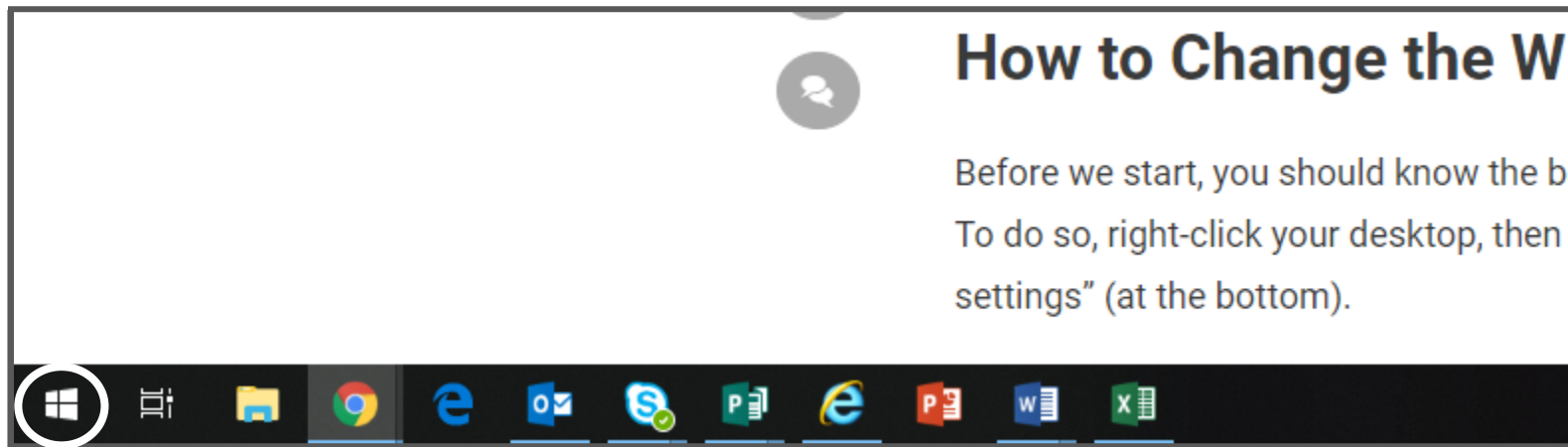
These instructions accompany the CSV Template. The template is used for the creation of an Employment File. This template is a tool to be used by smaller employers who do not have an automated way to create Employment Files.

Revised: 7/08/20

1) Changing Windows Default Delimiter

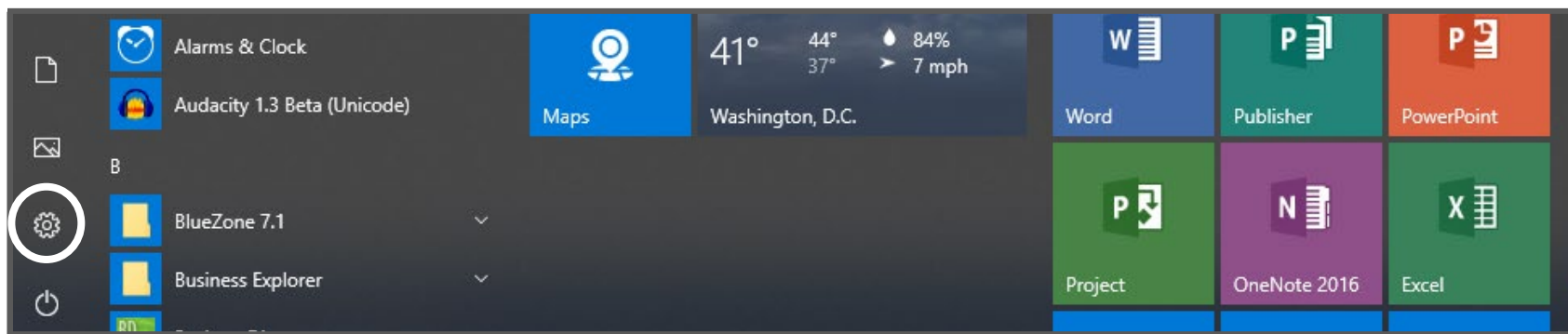
Step 1:

Click the **Microsoft Windows** icon in the bottom left-hand corner of your screen.



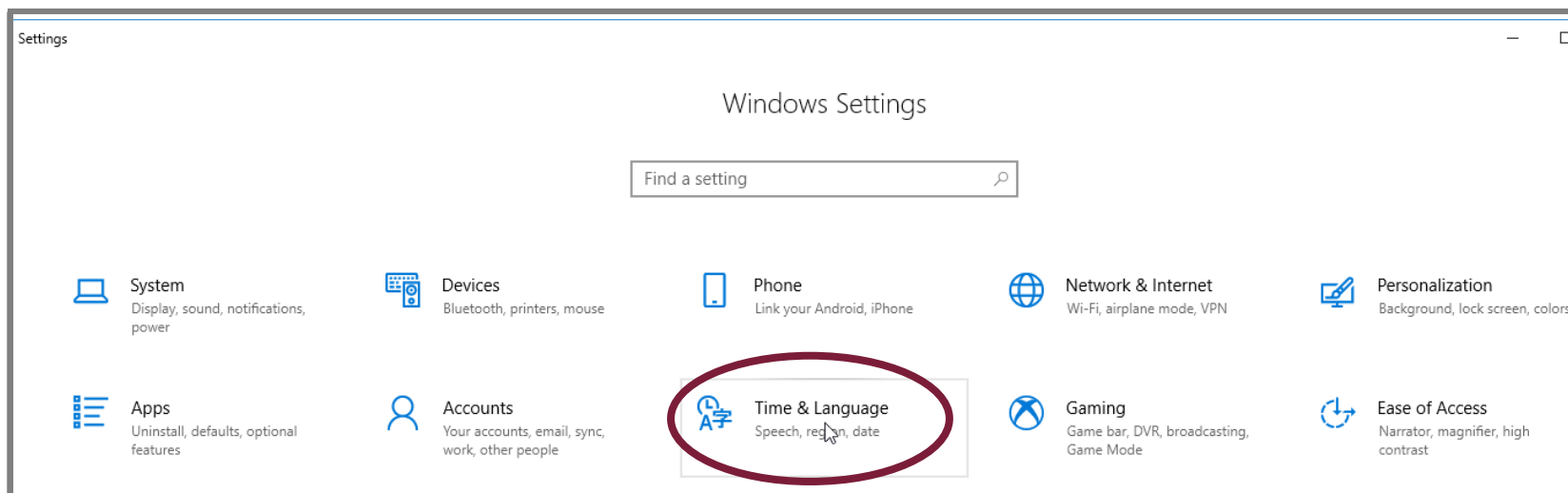
Step 2:

Click the **Gear Icon** to open the **Settings**.



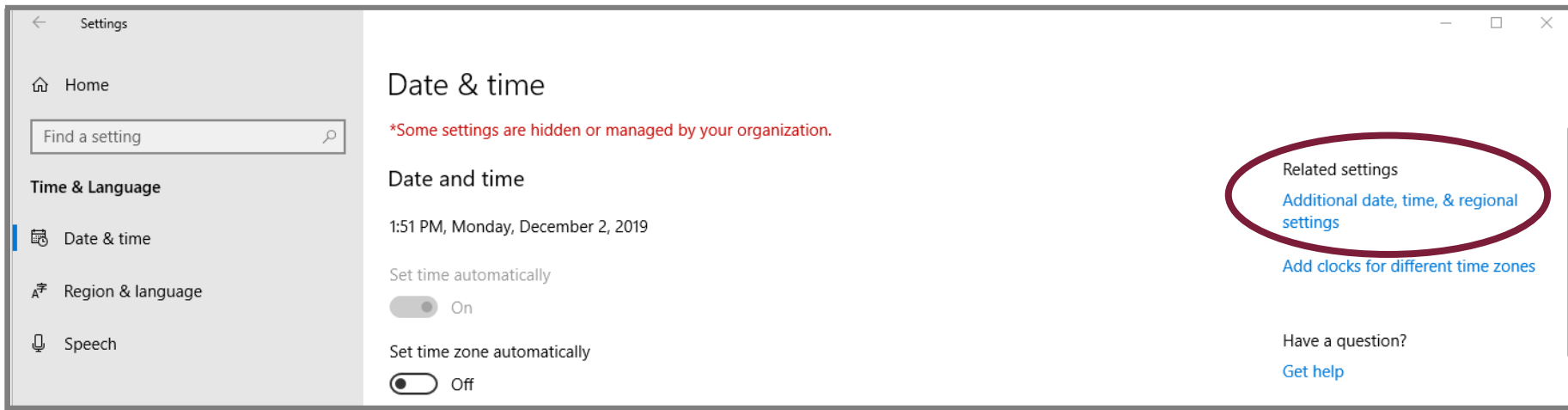
Step 3:

The **Windows Settings** box opens. Click **Time & Language**.



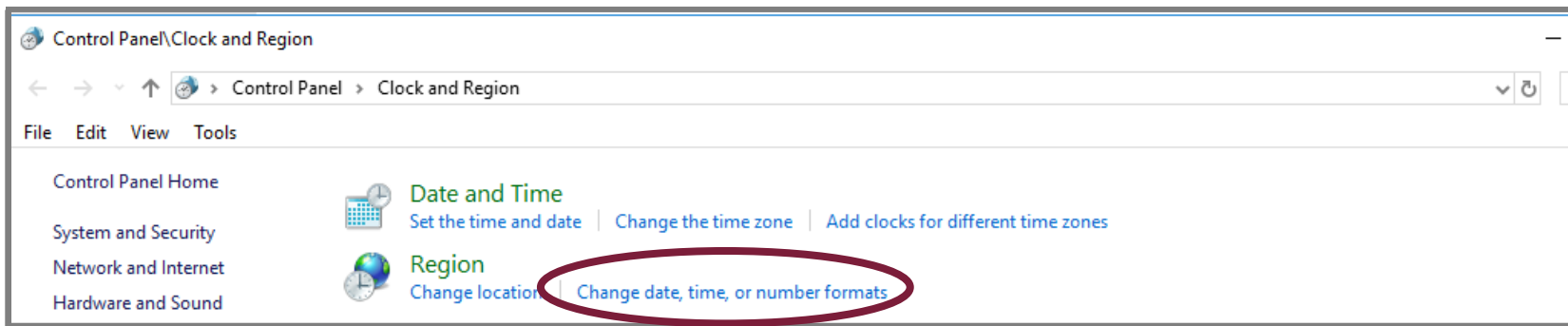
Step 4:

Under **Related settings** click the blue hyperlink for **Additional date, time & regional settings**.



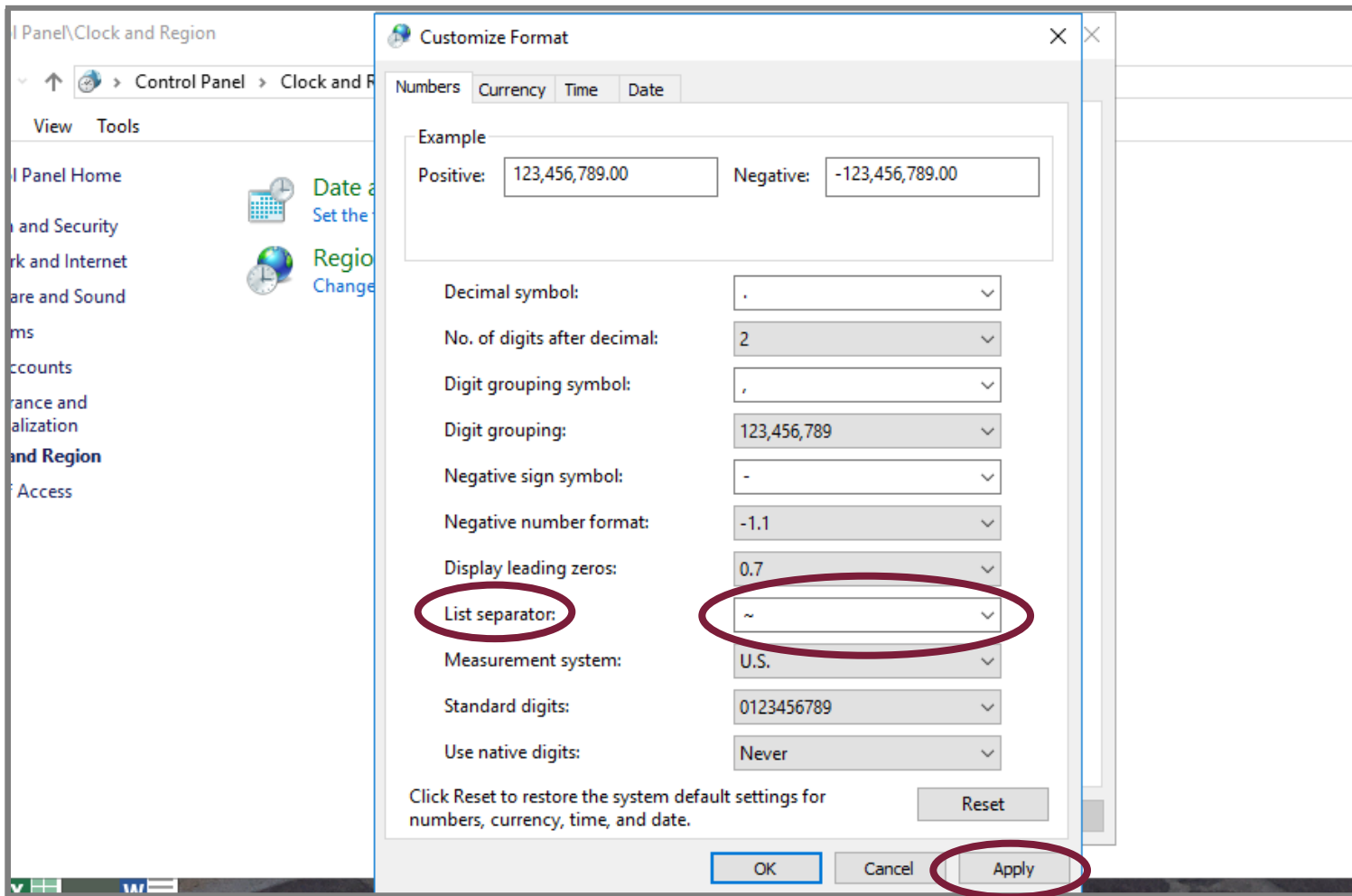
Step 5:

The **Control Panel** opens. Click the blue hyperlink for **Change date, time or number formats**.



Step 6:

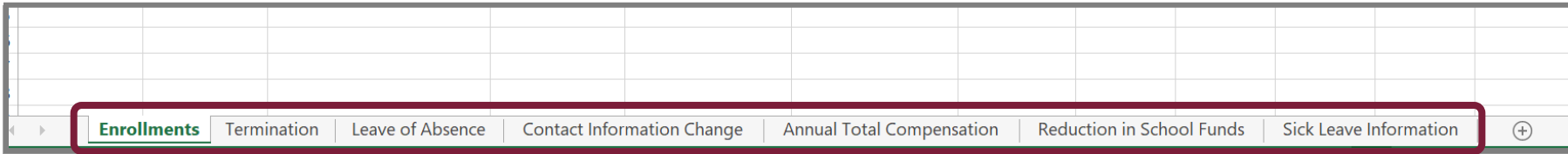
The **Customize Format** window displays. Change the default **List separator** from a comma to a **tilde (~)** and click **Apply**.



2) Creating an Employment File

Step 1:

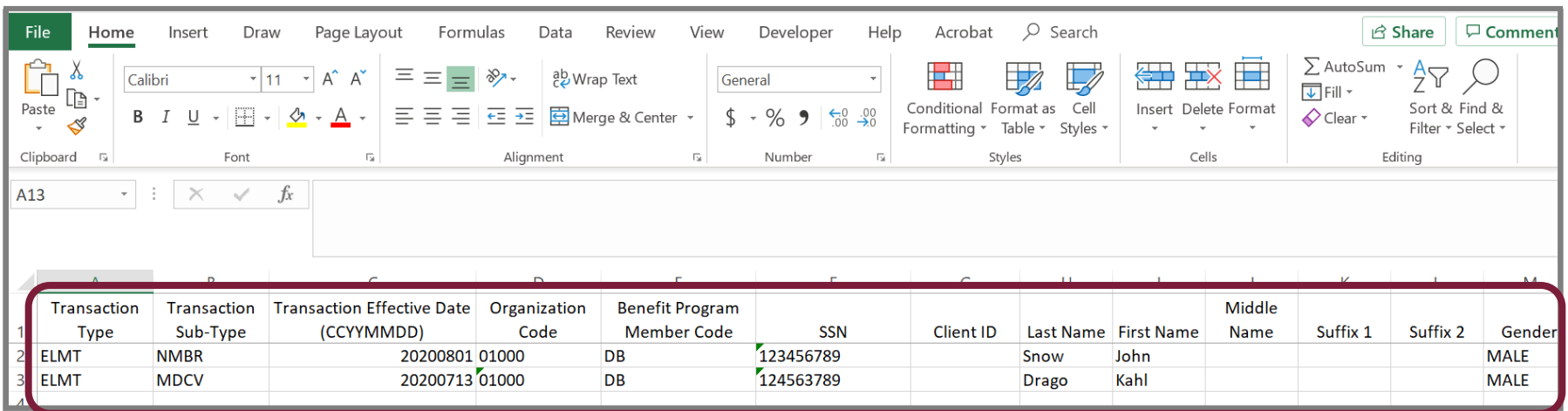
At the bottom of the template, select the appropriate tab for the file type you want to create.



Step 2:

Enter information into each column as needed. You may enter up to **999 records**.

Note: Some columns have validation rules built in to ensure the data entered is in the proper format.



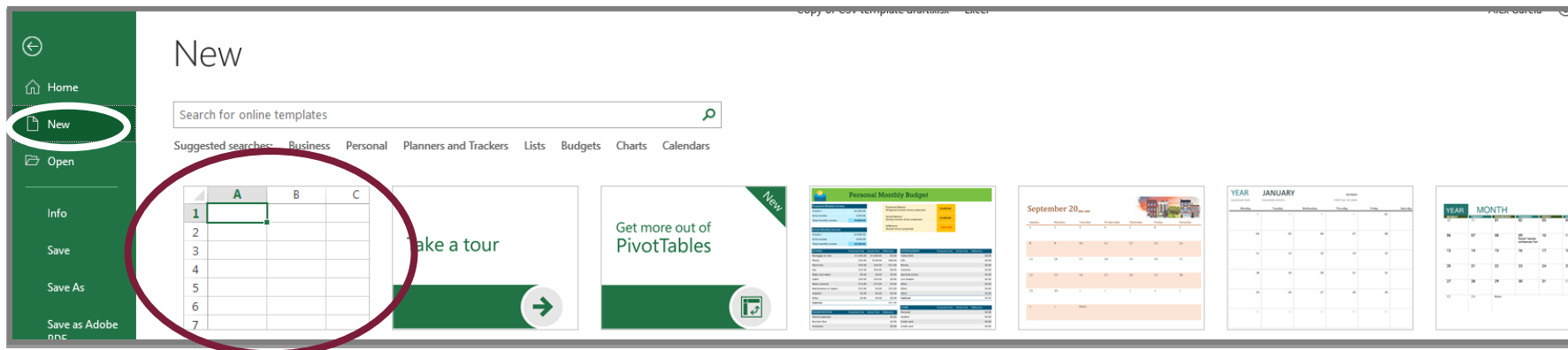
Step 3:

After you've entered all your records, open a new Excel Workbook. In the top right hand corner click **File**.

Transaction Type	Transaction Sub-Type	Transaction Effective Date (CCYYMMDD)	Organization Code	Benefit Program Member Code	SSN	Client ID	Last Name	First Name	Middle Name	Suffix 1	Suffix 2	Gender
ELMT	IBR	20200801	01000	DB	123456789		Snow	John				MALE
ELMT	MDCV	20200713	01000	DB	124563789		Drago	Kahl				MALE

Step 4:

Click **New**, then **Blank Workbook**. A blank workbook displays.



Step 5:

Highlight the records you input into the template. **Right click** and select **Copy**.

Note: Do not include the Row Headers when you copy the records.

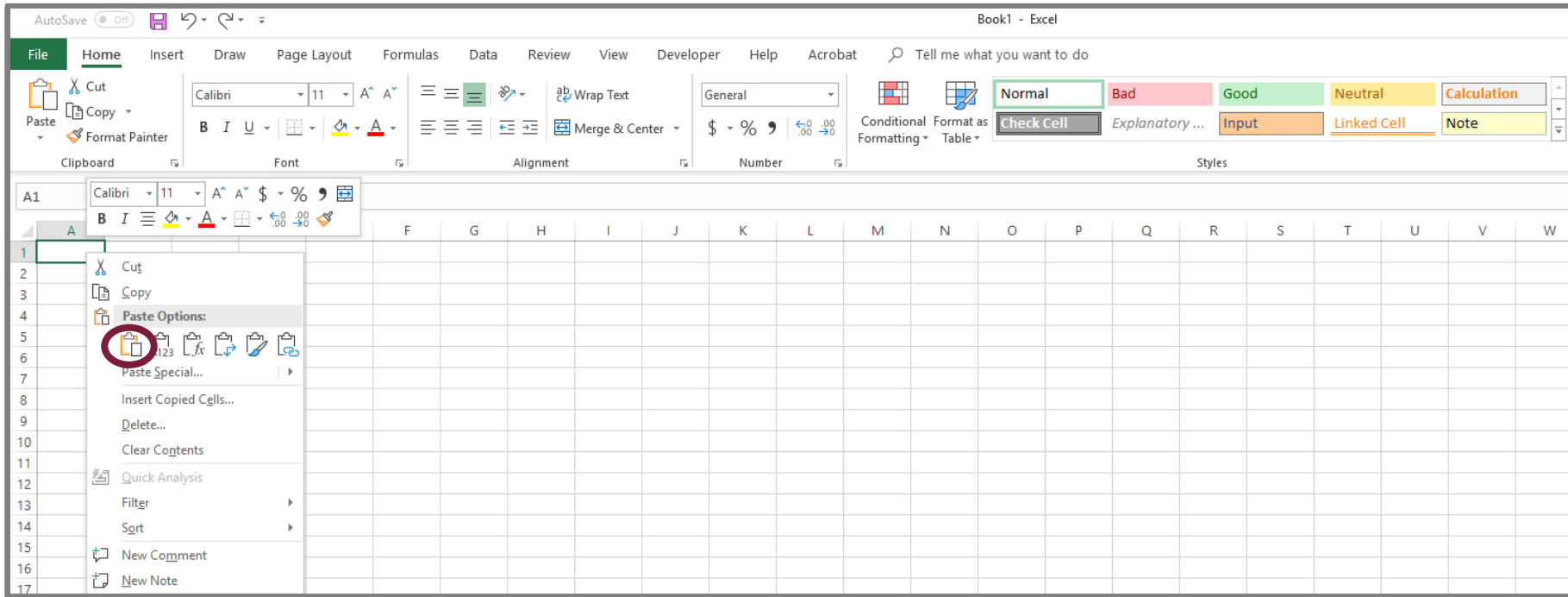
The screenshot shows the Microsoft Excel interface with the following data table:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Transaction Type	Transaction Sub-Type	Transaction Effective Date (CCYYMMDD)	Organization Code	Benefit Program Member Code	SSN	Client ID	Last Name	First Name	Suffix 1	Suffix 2	Gender	
2	ELMT	IBR	20200801	01000	DB	123456789		Snow	John			MALE	
3	ELMT	MDCV	20200713	01000	DB	124563789		Drago	Kah			MALE	
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The context menu is open over the 'Copy' option, which is circled in red. The menu items include: Cut, Copy, Paste Options, Paste Special..., Insert..., Delete..., Clear Contents, Quick Analysis, Filter, Sort, New Comment, New Note, Format Cells..., Pick From Drop-down List..., and Define Name...

Step 6:

Switch to the blank workbook you opened, in cell A1 **right click** and select the first **paste clipboard**.



Step 7:

The record details you copied display.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	ELMT	NMBR	20200801	01000	DB	123456789		Snow	John				MALE	19870809	1111 Alma Way		West Sacra	CA	95605
2	ELMT	MDCV	20200713	01000	DB	124563789		Drago	Kahl				MALE	19931201	2222 Water Way		East Sacra	CA	94604

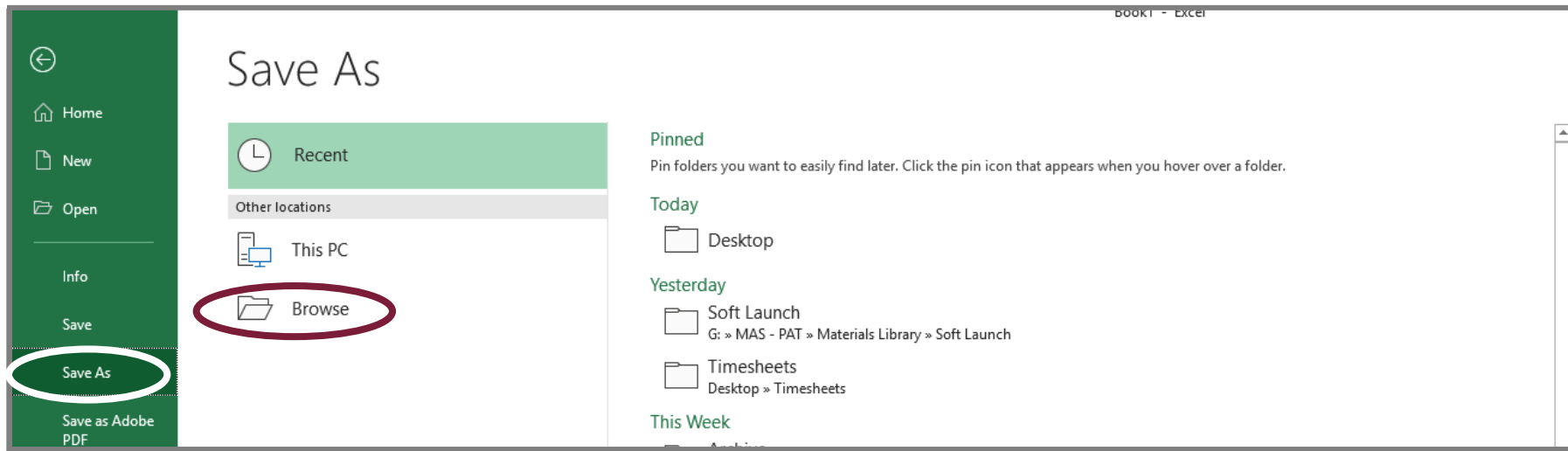
Step 8:

In the new workbook, click **File**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	ELMT	NMBR	20200801	01000	DB	123456789		Snow	John				MALE	19870809	1111 Alma Way		West Sacra	CA	95605
2	ELMT	MDCV	20200713	01000	DB	124563789		Drago	Kahl				MALE	19931201	2222 Water Way		East Sacra	CA	94604

Step 9:

Click **Save As**, then click **Browse**. The **Save As** window appears.



Step 10:

Select where you would like to save your file. In the **Save As Type** dropdown menu, select **“CSV (Comma delimited) *.csv”**.

