

## HOW TO CREATE A CSV FILE USING MICROSOFT EXCEL

The following instructions are for creating a comma-delimited or comma-separated value file known as a "CSV" file using Microsoft Excel. You may use any recent version of Microsoft Excel to create a CSV file (Microsoft Excel 97, 2000, XP, 2002, 2003, 2007). Log in and import the file at:

<https://employerportal.healthsanfrancisco.org/>

Note: If you choose to use another spreadsheet program to create a CSV file, please refer to that program's instructions for creating a CSV file.

Things to know before you start:

- The two difficult parts of creating a CSV file are:
  - Gathering the data.
  - Formatting the file.
- The CSV file will not import properly if it has missing columns, extra columns, or extraneous rows.

### Step 1: Gather your data

The following table (Table 1) shows the information you need to gather for each employee receiving a contribution. Do not include employees receiving a \$0.00 contribution:

Table 1: CSV file information

Data (column name)	Description	Formatted example	Min/Max field length	Requirement
SSN	Social security number	123456789	9/9	Required
DOB	Birth date	02/14/1970	10/10	Required
FirstName	First name	Randall	1/50	Required
MI	Middle initial	S	0/1	Optional
LastName	Last name	Taylor	1/50	Required
Address1	Residential address line 1	201 First Street	1/255	Required
Address2	Residential address line 2	Apt 3	0/255	Optional
City	Residential city	San Francisco	1/50	Required
State	Residential state (abbreviation)	CA	2/2	Required
ZIP	Residential ZIP code	94102	5/5	Required
PrimaryPhone	Primary phone number	4155552000	10/10	Required
AlternatePhone	Alternate phone number	4155551234	0/10	Optional
OtherHealthCoverage	Does this employee have other health coverage (YES/NO)	NO	2/3	Required
ContributionAmount	The amount contributed for this employee (\$0.01 and greater)	123.45	8,2	Required

Note: Some companies get this information from other computer systems. Others may have this information already in spreadsheets. As you gather this information, store it in Excel to make the process easier.

## Step 2: Create your file

Now that you have the information you need, perform the following steps:

1. Open Microsoft Excel
2. Create your file's header row by typing the following column names **exactly** (without quotation marks or spaces between words):
  - a) In cell A1, type "SSN"
  - b) In cell B1, type "DOB"
  - c) In cell C1, type "FirstName"
  - d) In cell D1, type "MI"
  - e) In cell E1, type "LastName"
  - f) In cell F1, type "Address1"
  - g) In cell G1, type "Address2"
  - h) In cell H1, type "City"
  - i) In cell I1, type "State"
  - j) In cell J1, type "ZIP"
  - k) In cell K1, type "PrimaryPhone"
  - l) In cell L1, type "AlternatePhone"
  - m) In cell M1, type "OtherHealthCoverage"
  - n) In cell N1, type "ContributionAmount"
3. Enter employee data **in the format specified** in Table 1 (in step 1)
  - a) In cell A2, enter the first employee's social security number.
  - b) In cell B2, enter the first employee's date of birth.
  - c) In cells C2-N2, enter the appropriate information.
  - d) Enter in the rest of your employees or copy/paste this information from the appropriate source

**Excel tip:** If your social security numbers have leading zeroes, you must use custom formatting to display the leading zeroes on your spreadsheet properly. Right-click column A and select Format Cells. In the Number tab under Category, select Custom. In the Type field, enter "000000000" (nine zeroes, without quotes) and click OK. If you choose not to use custom formatting, you will encounter errors during the import process.

### Important notes:

- Middle Initial (MI), Address2, and AlternatePhone are optional fields for each employee row, but all three columns must be present in order for the roster to import properly.
- If your file has missing columns, extra columns, or extraneous rows, it will not import properly. For example, off-to-the-side calculations will cause an error. Extra rows such as a title row "Company X Roster Quarter 3 2008" will cause an error.
- Each field may not exceed its maximum field length. Make sure you do not have blank spaces preceding or trailing any field value if not necessary. For example, SSN "123456789 " will cause an error because of the extra spaces after the last digit.

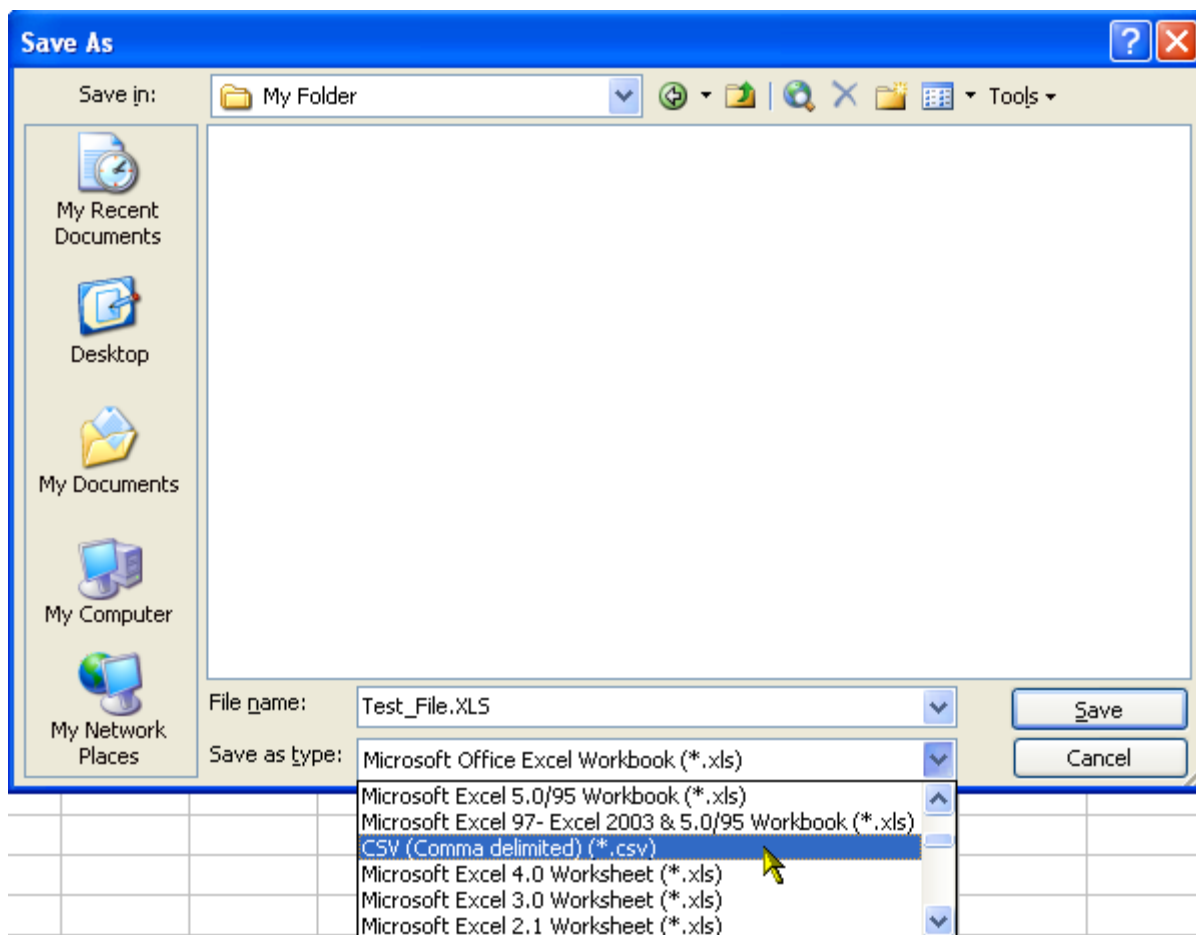
After the creating the header row and entering two employees, your file should look something like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	SSN	DOB	FirstName	MI	LastName	Address1	Address2	City	State	ZIP	PrimaryPhone	AlternatePhone	OtherHealthCoverage	ContributionAmount
2	123456789	1/1/1971	MICKEY		MOUSE	102 First St		Foster City	CA	94404	6509876543		NO	123.45
3	012345678	2/2/1972	WINNIE	T	POOH	103 First St		Anaheim	CA	801	9099871234	9093211234	YES	80

### Step 3. Save your file

Once you have listed all of your employees, save your file as a CSV file.

1. From the File menu, select "Save As..."
2. From the "Save in:" drop-down menu, select the location to save your file.
3. In the "File name:" field, type the name you wish to call this file.
4. From the "Save as type:" drop-down menu, scroll down to select "CSV (comma-delimited) (\*.csv)" and Click Save (see below).



Your file is now ready to import via the Healthy San Francisco website.

Note: If you open your CSV file, it will not look like the original Excel file you created. Do not be alarmed. If you followed these instructions, the file will import properly.

This site will attempt to import your entire file regardless of any formatting errors that may reside in the file. However, we do not accept responsibility for data that is imported improperly. We offer you the option to make adjustments to the file that you import. As such, we cannot accept responsibility for any inconveniences caused from discrepancies between the file you originally uploaded and the roster that you eventually submit to us. For information regarding use of this site, please see the website's Terms and Conditions.