

Action *	FEIN *	Organization Name *	Address Line1 *	Address Line2	Address Line3	City *	State +	Province +	Country *	ZIP/Postal Code *	Communication Preference *	Payroll/Income Withholding Order Address	National Medical Support Notice Address	Employment Verification Address	Workers' Compensation Address
----------	--------	---------------------	-----------------	---------------	---------------	--------	---------	------------	-----------	-------------------	----------------------------	--	---	---------------------------------	-------------------------------

Action *	FEIN *	First Name *	MI	Last Name *	Domestic/ International *	Phone Number *	Phone Ext	Email *	Shared Email Account *	Fax Number	Business Contact *	Payroll/Income Withholding Order Contact *	National Medical Support Notice Contact *	Employment Verification Contact *	Multistate Contact *	Workers' Compensation Contact *	Technical Contact *	Alternate Contact *	General Contact *	Lump Sum Contact *	Accounts Payable Contact *
----------	--------	--------------	----	-------------	------------------------------	----------------	-----------	---------	---------------------------	------------	--------------------	---	--	--------------------------------------	-------------------------	------------------------------------	------------------------	------------------------	----------------------	-----------------------	----------------------------------

Instructions

Note: Any error in the Organization Upload worksheet invalidates the organization, any corresponding contact records, or both. A record consists of the entire row in the Organization Information tab or Contacts tab. After we process this Excel worksheet, an error log will be emailed to you; check this log for errors.

Correct only the affected records and re-upload the file to resolve the issue. Any records without errors were loaded the first time and do not need to be included in subsequent loads.

- Make sure all data intended for processing is on the Organization Information and Contacts worksheets.

Organization Upload Template Filenaming Conventions and File Size Limit

Use only the following characters in the Organization Upload.xlsx filename:

- A-Z
- a-z
- 0-9
- Underscore (_)
- Dash (-)
- Period (.)
- Use only the following file extensions for the filename:
 - .xls
 - .xlsx
- Make sure the file size does not exceed 2 MB.

Copy, Paste, and Delete Content in Organization Information and Contacts Worksheets

Note: When you copy, paste, or delete text, be careful not to change the cell's formatting.

- To copy the content of a cell and paste it in another cell:
 1. Select the text to copy in the cell.
 2. Right-click and select **Copy**.
 3. Click the cell where you want to paste the text.
 4. Right-click and select **Paste Special**. The Paste Special dialog box opens.
 5. On the left, make sure that **Paste** is selected.
 6. In the **As** field, select **Text**.
 7. Click **OK**.
- To delete the content of a cell from a required column:
 1. Select the text to delete in the cell.
 2. Right-click and select **Clear Contents**.

Organization Information Worksheet

The Organization Information worksheet (tab) includes the same fields as the Add Organization online form in the Employer Information Updates application.

On this worksheet:

- Required column headers have an asterisk (*) with a light blue background. Conditional column headers (Organization Information worksheet only) have a plus (+) with a yellow background.
- Optional column headers have no symbol and a white background. For information about a specific column, hover over that column header.

Columns (Fields)

Action:

- This field is required.
- In the drop-down list, select the correct action type:

- **Add Organization** to insert your new company.
- **Update Organization** to modify your existing company.
- **Delete Organization** to remove your existing organization.

When you select this option, enter only the following information:

- In the FEIN column, your company's FEIN.
- In the Organization Name column, your company's name.
- **Delete All Organizations** to remove all related organizations.

When you select this option, in row 2 in the Organization Name column, you must enter exactly as shown: **delete all current organizations**.

FEIN:

- This field is required.
- Enter the nine numeric characters of your company's FEIN without hyphen.

Organization Name:

- This field is required.
- Enter no more than 65 alphanumeric characters for your company's name.
- Valid values are A-Z, a-z, 0-9, embedded spaces, and special characters # : ' ; , - _ . @ &

Address Line1:

- This field is required.
- For the first line of your company's address, enter no more than 40 alphanumeric characters.
- Valid values are A-Z, a-z, 0-9, embedded spaces, and special characters # : ' ; , - _ . @ &

Address Line2:

- This field is optional.
- For the second line of your company's address, enter no more than 40 alphanumeric characters.
- Valid values are A-Z, a-z, 0-9, embedded spaces, and special characters # : ' ; , - _ . @ &

Address Line3:

- This field is optional.
- For the third line of your company's address, enter no more than 40 alphanumeric characters.
- Valid values are A-Z, a-z, 0-9, embedded spaces, and special characters # : ' ; , - _ . @ &

City:

- This field is required.
- For the city where your company is located, enter no more than 25 alphabetic characters.
- Valid values are A-Z, a-z, embedded spaces, and special characters - . ' "

State:

- This field is conditional: if your entry in the **Country** column is UNITED STATES, this field is considered required.
- In the drop-down list, select the two-character alphabetic state code where your company is located.

Province:

- This field is conditional: if your entry in the **Country** column is not UNITED STATES, this field is considered required.
- Enter no more than 25 alphabetic characters for the province where your company is located.
- Valid values are A-Z, a-z, embedded spaces, and special characters - . ' "

Country:

- This field is required.
- In the drop-down list, select the country where your company is located.

ZIP/Postal Code:

- This field is required.
- Enter the ZIP Code or Postal Code for where your company is located:
 - For the United States and specific U.S. territories (domestic locations), enter a five- or nine-numeric character ZIP Code.
 - For foreign, non-domestic locations, enter a postal code with no more than 10 alphanumeric characters.

Communication Preference:

- This field is required.
- This is the method you want the state to use to contact your company.
- In the drop-down list, select **Email**, **Fax**, or **Phone**.

Address Type:

- These fields are optional.
- There are four address-type columns:
 - **Payroll/Income Withholding Order Address**
 - **National Medical Support Notice Address (NMSN)**
 - **Employment Verification Address**
 - **Workers' Compensation Address**
- In each address-type column, specify whether child support agencies can use the address you entered for your company to send documents to concerning that type of information by selecting **Yes** or **No**.

Contacts Worksheet

On this worksheet:

- Required column headers have an asterisk (*) with a light blue background.
- Optional column headers have no symbol and a white background. For information about a specific column, hover over a column header.

Columns (Fields)

Action:

- This field is required.
- In the drop-down list, to insert a new contact for your company, select **Add Contact**.

FEIN:

- This field is required.

- Enter the nine numeric characters of your company's FEIN without hyphen.

First Name:

- This field is required.
- Enter no more than 24 alphanumeric characters.
- Valid values are A-Z, a-z, 0-9, embedded spaces, and special characters - . ' "

Middle Initial:

- This field is optional.
- Enter only one alphabetic character.
- Valid values are A-Z and a-z.

Last Name:

- This field is required.
- Enter no more than 24 alphanumeric characters.
- Valid values are A-Z, a-z, 0-9, embedded spaces, and special characters - . ' "

Domestic/International:

- This field is required.
- In the drop-down list, select whether this contact is **Domestic** or **International**.

Phone Number:

- This field is required.
- Enter the phone number for the contact. How many numeric characters you enter depends on your selection in the **Domestic/International** column:
 - If you selected **Domestic**, enter 10.
 - If you selected **International**, enter no more than 15.
 - Do not enter any special characters like parentheses or hyphens (-).

Phone Ext:

- This field is optional.
- Enter no more than six numeric characters.

Email:

- This field is required.
- Enter no more than 40 alphanumeric characters.
- Valid values are A-Z, a-z, 0-9, and special characters - _ . @
- Do not use the following domain names as they are restricted for security purposes in the Child Support Portal application: @gmail.com, @hotmail.com, @msn.com, @yahoo.com

Shared Email Account:

- This field is required.
- In the drop-down list, select **Yes** or **No**.

Fax Number:

- This field is optional.
- Enter the phone number for the contact. How many numeric characters you enter depends on your selection in the **Domestic/International** column:
 - If you selected **Domestic**, enter 10.
 - If you selected **International**, enter no more than 15.

Contact Type:

- These fields are required.
- There are 11 contact-type columns:
 - **Business Contact**
 - **Payroll/Income Withholding Order Contact**
 - **National Medical Support Notice Contact**

- **Employment Verification Contact**
- **Multistate Contact**
- **Workers' Compensation Contact**
- **Technical Contact**
- **Alternate Contact**
- **General Contact**
- **Lump Sum Contact**
- **Accounts Payable Contact**

- When you add a contact for your company, in each contact-type column, specify whether the contact you are adding is the contact for that type of information by selecting **Yes** or **No**.

Note: When you add your company (on the Organization Information worksheet), you must enter a contact and designate it as a **Business Contact** and any other contact types that apply. All new companies must have at least one Business Contact.