INSTRUCTIONS FOR COMPLETING THE YEAR-END CENSUS PACKET

It is time to gather information for the 2015 report for your plan (December 31, 2015 PYE). You will shortly receive an email with a link to your **census file** via the secure website. Please complete the following:

1. Column N - Please enter **total compensation** – you will find the compensation definition code and the specified period for which compensation is to be reported in the census file. If your plan uses W-2 Compensation, note that you should not take the compensation figure from your W-2 forms but rather a payroll report. Refer to the attached Compensation Definition.pdf for an explanation of each compensation definition code. ***See info on "post severance" pay, which is NOT to be included.***
2. Column O - Please provide the **hours** worked (including hours in which they were entitled to payment for which they did not work such as vacation, holiday, sick, etc.) for each employee during the period noted, include hours for everyone who worked for you during the year, including terminated employees.
3. Column L – Please note any **termination dates** not listed. If the employee died, became disabled or is on leave of absence (noting if it is military leave), please note. For anyone who was rehired, his or her previous termination date should be listed in Column M, with the most recent hire date listed in Column J. Only the most recent termination date should be entered in Column L. Be sure to note if any employee is a "military rehire" as special rules apply to qualified military service.
4. Column P - If this is a 401(k) plan, please enter the **actual dollar amount of the total non-Roth 401(k)** contributions deducted from each participant's pay during the period (from your payroll report). Needed to verify all deducted amounts were received by the Plan.
5. Column Q –If your plan permits Roth 401(k) contributions, please enter the **actual dollar amount of the total Roth 401(k)** contributions deducted from each participant's pay during the period. This is used to verify that all deducted amounts were received by the Plan (Roth contributions must be recorded separately from pre-tax 401K contributions).
6. Column R - For any employees, who completed their **first year of employment** during this plan year, please include hours for their first 12-months of employment.
7. Please review and modify (if necessary) all of the data in the remainder of the file including **names, Social Security Numbers, dates of birth and hire.** To help us identify changes, please put an "Asterisk" in any field that you change (or highlight).
8. Review the **ownership** in Column E – note that any lineal ascendants or descendents or spouses are treated as owning the stock of their relative. Note: Ownership for partnerships is based on capital interest and profit interest.
9. Review the **officer status** in Column F – Code "Y" for any employee who is an Officer of the business at any time during the year.
10. Please be sure that any employee with a **relationship to an owner** is coded in Column G.
11. Employees who were employed by you at any time during the period, and who are not listed in the census file, should be **added at the bottom** – include all information.

PLEASE CONTACT YOUR ADMINISTRATOR SHOULD YOU HAVE ANY QUESTIONS.