

Plan Census Maintenance

Guide to add/edit employee information

Census data is used to create participant records, support compliance testing, and perform various recordkeeping functions. The more frequently it is updated, the better your plan will run. The timely and regular submission of census data for all employees will allow Ascensus to automatically track participant eligibility and vesting which allows participant transactions to process quickly and efficiently.

ADD OR UPDATE AN EMPLOYEE CENSUS RECORD

1. Log in to your plan website and click **Plan Administration** from the black box on your dashboard.
2. On the navigation menu, click **Employee** and select either **Add a New Employee** or **Select an Employee**. Follow the outline below according to your selection.

Add a New Employee

The following is a list of the general employee and employment information fields that are required for **all employees** (participants and non-participants).

1. Enter all required values and complete any applicable optional fields:

GENERAL EMPLOYEE INFORMATION

- First Name
- Last Name
- SSN
- Verify SSN
- Date of Birth
- Address Line 1
- City
- State
- Zip Code

EMPLOYMENT INFORMATION

- Contribution Site
- Employment Status
- Date of Hire

2. Click **Save** at the bottom of the page.

Select an Employee

1. Enter the employee's full Social Security Number or partial first or last name in the applicable field.
2. Click **Continue**.
3. Once you are on the selected employee's information page, review the applicable sections that contain the census data you need to edit:
 - a. General Employee Information
 - b. Employment Information
 - c. Compliance Section
4. Click the **Edit** button in the applicable section.
5. Enter the new information in the applicable census data field.
6. Click **Save** at the bottom of the page.

SPECIAL STEPS FOR REHIRING AN EMPLOYEE

If you are rehiring an employee, you will need to enter the following dates under Employment Information.

1. Copy the values from the *Date of Hire* field into the *Prior Date of Hire* field
2. Copy the values from the *Termination Date* field into the *Prior Date of Termination* fields.
3. Update the *Date of Hire* field to the *Rehired Date*
4. Leave the *Termination Date* field blank as this correlates to the rehire date.