

CENSUS FILE

ALERT BULLETIN

Annual Census Information for December 31, 2019 and Later

The end of the Plan calendar year is fast approaching which means it will be time for plan sponsors to collect complete employee data to enable HPA to perform employer contributions and numerous compliance tests required to retain the plans tax qualified status.

In the last week of December, census files and the Data Collection Checklist will be uploaded to the Communications file on the Vault (www.smartvault.com). Please do not password protect or change the layout of the file when re-submitting. All census files (in excel format) and Data Collection Checklist must be submitted electronically through our secure Vault.



Any information provided in the census file that is either handwritten or not in its original format could be subject to additional fees due to data entry that must be done by HPA.

The information contained in these documents will assist with compliance testing and plan requirements that must

be met. This best-practice approach for receiving complete data helps ensure a smooth workflow for accurate and timely compliance testing.

ADDED SERVICE

As an added value to you, our clients, we will contact your payroll company directly to receive year end census data provided you grant us the authority to receive the information. Please contact your payroll company to grant us permission and inform us so that we may contact them directly. **Please note** -- the Plan Sponsor must complete the Data Collection Checklist completely, including payroll contact information.

Your census file will include (at a minimum) name, social security number, date of birth, and date of hire.

- Ensure that all financial and census data is provided for every employee who received a W-2, even if they are not eligible, did not contribute to the plan, or terminated during the plan year.
- Verify the accuracy of the information on the census file, add any missing information (employees, dates, etc.).
- Re-submit the census , Data Collection Checklist, Copy of Bond and Payroll totals page or W3 through our Vault.

For additional information please either contact us directly or visit our website at: www.hillspallc.com