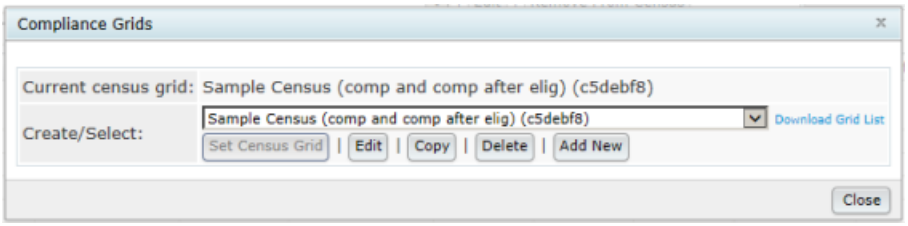
5.1. Select Census Grid

09/19/2025 2:42 pm CDT

If you are setting up a new plan, the first step on this page is to select the census grid for the participant data that you will be uploading. Click on the “Change” link to select, edit, copy, or change the Current Census Grid. From the drop-down box, select the grid you want and click the “Set Census Grid” button. You will see that each of the grids available has a unique code - a combination of letters and numbers - that the software uses to identify it. You will see this code when you download the grid as described below.



We’ve created several sample “primary census grids” that we suggest you use to upload your census data. Appendix I displays a chart to help you choose the grid that is right for your plan.

In addition to the individual characteristics shown in Appendix I, all of the sample grids contain the following recommended fields:

- Last Name
- First Name
- Social Security Number
- Date of Birth
- Date of Hire 1
- Date of Termination 1
- Termination Reason 1
- Date of Hire 2
- Date of Termination 2
- Termination Reason 2
- Hours
- Statutory Compensation
- Elective Deferral Contribution
- Roth Contribution
- Match Contribution
- Safe Harbor Non-Elective Contribution
- Non-Elective Contribution
- Officer Status
- Ownership Percentage
- Family Group (for ownership attribution)
- Family Group Relationship
- New Comparability Group

If additional columns are needed or you would like to delete columns that you will not be using, it is a best practice that you copy the primary census grid that most closely matches your needs, rename that grid then make the necessary

edits.

To view what fields are available in a particular grid or to custom-design your own census grid, see the"Edit Data Entry Grids" article. **Note:** only grids that contain the SSN (Social Security Number), Employee Number field, or both will be available as an option to select as a data entry grid. Users can elect to use either field but it must match the unique identifier specified in the ID for Participant Upload/Download field in that plan's Plan Specifications Menu>General Features>General Information.