How to create an employee census information file

Complete and accurate employee data is crucial to the successful launch and administration of your retirement plan. Below you'll find detailed instructions on how to successfully download your employee census information file template, populate it with your employee data, save the file, and submit it to John Hancock.

If you choose to create your own file rather than use the census file template, please start by downloading your prepopulated template for reference (see step 1 below). Formatting is important—please be sure to use the census file specifications included in this guide.

And if you have any questions about our online submission tools or process, just contact your John Hancock client account representative.

Step 1: Download the prepopulated employee census file template

1. Download the template from the "Tools" page of the plan sponsor website and save it to your hard drive.*
2. Log in to the plan sponsor website.
3. Select "Tools" from the "Your resources" tab.
4. Select the census file template icon or link.
5. Select **Open** to view your file in Excel.
6. Adjust the columns, so you can view all the employee data.
7. **Save** the file to your preferred location.

Step 2: Update your employee census information in the template file you've downloaded and saved

Your template will be prepopulated with census information for all employees we currently have on file.

1. Note all the required data fields, which are included in the spreadsheet's column headers. **Be careful not to change or delete the header row, header labels, or first column. If any of this data is altered, your file can't be processed.**
2. Review all information in the spreadsheet carefully to be sure it's accurate.
3. Add any newly hired employees who don't appear on the list. See the "census file specifications" section of this guide for file layout details.

Step 3: Save the employee information census file and it send to John Hancock

1. Once your file is updated, select the drive and/or directory you wish to save it to.
2. Change the date in the filename: for instance, "census template for contract [your contract #] for [payroll date].csv." Make sure your file is saved in CSV format.
3. Click the **Save** button, then click **Yes** to keep the workbook in the appropriate format.
4. You're now ready to send your file to John Hancock. Log in to the plan sponsor website and submit your file by selecting the **Upload a census file** link on the "Submission history" page.

Census file specifications

Field	Header field	Data field description	Max field length	Description
1	cens.h10	Census record identifier = cens.d	8	This field informs John Hancock as to the type of file you're submitting. Code the header field column as "cens.h10" and the row records as "cens.d."
2	Cont#	Contract number	7	Your John Hancock contract number.
3	SSN#	Social Security number	11	Social Security number for each employee. If using hypens (-) with your SSN#, the maximum length is 11 characters. Note: Employee SSNs can't be changed electronically. Please contact your John Hancock client account representative or submit the Employee Information Change Request Form – GP 1534 for employee SSN changes.
4	FirstName	First name	18	The employee's first name. The name included on the file submission will update the employee name on record with John Hancock.
5	LastName	Last name	20	The employee's last name. The name included on the file submission will update the employee name on record with John Hancock.
6	Initial	Middle initial	1	The employee's middle initial. The initial included on the file submission will update the employee initial on record with John Hancock.
7	NamePrefix	Name prefix	4	Employee's title. The valid entries for this field include Mr., Mrs., Ms., and Dr.
8	EEID#	Employee ID	9	If using EEID#, each employee must have a unique identifier. This is a mandatory field for contracts who use the EEID# to submit contribution files. It's optional for all other contracts. If the EEID# is the employee SSN, don't use this field. Numbers entered in this field won't be masked or hidden from view on our websites, confirmations, or quarterly statements.
9	Address1	Address line 1	30	Employee's mailing address. Address line 1 is mandatory if you're supplying a mailing address for the employee.
10	Address2	Address line 2	30	Employee's mailing address. Address line 2 is optional for the employee.
11	City	City	25	Employee's mailing address. City is mandatory if you're supplying a mailing address for the employee.
12	State	State	2	Employee's mailing address. State is mandatory if you're supplying a mailing address for the employee.
13	ZipCode	Zip code	10	Employee's mailing address. Zip code is mandatory if you're supplying a mailing address for the employee.
14	Country	Country	3	Employee's mailing address. If left blank, the default will be United States.
15	StateRes	State of residence	2	Employee's mailing address. The state provided may be different from the employee's mailing address.
16	ERProvEmail	Employer-provided email address	99	Employer-provided email address. This may be different from the email address supplied by the employee during registration on the participant website. This email address will be used to communicate with employees directly for various current and future service offerings (i.e. EZincrease, online deferral, scheduled deferral changes, and participant website password resets).

Census file specifications (cont'd)

Field	Header field	Data field description	Max field length	Description
17	Division	Division	25	The company description of the employee's assigned category (i.e., division, section, or location).
18	BirthDate	Birth date	10	Employee's date of birth. If the contract's default investment option is the lifecycle funds, date of birth is mandatory.†
19	HireDate	Hire date	10	Date the employee was hired by the company.†
20	EmplStat	Employment status	1	Employee's current employment status. Valid entries are blank, active (enter A), disabled (enter P), deceased (enter D), retired (enter R), and terminated (enter T). EmplStat is mandatory if EmplStat is submitted.
21	EmplStatDate	Employment status effective date	10	Date the employee's employment status changed. Mandatory if EmplStat is submitted.†
22	EligInd	Eligible employee indicator	1	This indicates whether this employee is eligible to participate in the plan. Valid entries are blank, yes (enter Y), or never (enter N).
23	EligDate	Eligibility date	10	If the employee is eligible to participate in the plan, an eligibility date must be supplied. Mandatory if EligInd is submitted.†
24	OptOutInd	Opt-out indicator	1	If the employee is eligible to participate in the plan, but has opted out of plan participation, indicate Y. Otherwise, valid entries are no (enter N) or blank.
25	YTDHrs	Year to date	5	Employee's year-to-date (YTD) hours worked eligible for plan participation and service calculations. If this field is populated, the YTDHrsWkCompDt field must have a date.
26	PlanYTDComp	Plan YTD compensation	13	Employee's YTD compensation eligible for plan testing. This value will be blank on the downloaded template if you don't have the authority to view this information. If this field is populated, the YTDHrsWkCompDt field must have a date.
27	YTDHrsWkCompDt	Plan YTD hours worked/comp effective date	10	Effective date of the information supplied for employee's plan YTD hours worked and eligible compensation. Mandatory if either YTDHrs or PlanYTDComp is submitted. Don't populate if YTDhrs and PlanYTDComp aren't populated.†
28	BaseSalary	Annual base salary	13	Employee's annual base salary. This value will be blank on the downloaded template if you don't have the authority to view this information.
29	BfTxDefPct	Before-tax deferral percentage	7	Employee's ongoing before-tax deferral (EEDEF) percentage. Don't default to "0," leave blank if not used.‡
30	DesigRothPct	Designated Roth percentage	7	Employee's ongoing designated Roth 401(k) (EEROT) deferral percentage. Don't default to "0," leave blank if not used.‡
31	BfTxFltDoDef	Before-tax flat dollar deferral	9	EEDEF flat dollar amount. Don't default to "0," leave blank if not used.‡
32	DesigRothAmt	Designated Roth amount	9	EEROT deferral amount. Don't default to "0," leave blank if not used.‡

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* Plan sponsor website users with limited access will receive a blank template for use in uploading census information. † For all date fields, the valid formats are mm/dd/yyyy, mmddyyyy, mm/dd/yy, and yyyy/mm/dd. ‡ The employee can elect to defer either an amount or a percentage within a single category (designated Roth or before-tax deferral). Consult your plan document for any limitations.

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