**ftwilliam.com Compliance Software - Helpful Hints for New Census Options**

1. The participant records below the grid are now editable so you will no longer need to add records back to the census data to correct their information. The data maybe edited for a single participant or in batches.

* Edit –
  + The participant ID in the first column of the download is crucial to this feature and must not be removed or modified
  + When an Edited file is uploaded the participants in the file must be selected (or reselected) with the ‘Do with Selected’ for the upload to work.
  + The SS# can be edited in the file or on the screen
  + The modified dates of hire & term do not appear in the participant’s history
* Add to Census -
  + This feature retains certain data from the last year’s census. Any dates of hire & term in prior year’s census will populate the grid. Also Compensation, Hours, Contributions.
  + Download prior link still functions the same.
  + Download current link will have data for participants that were ‘Added to census’.
  + Once a primary census file has been uploaded the prior year data will no longer be available for the participants in the file (delete & Re-add year will retrieve the data )
* Delete –
  + This a cleanup tool for participants who should never been in the data such the wrong census file is uploaded or duplicate records
  + If the participant is in a transaction batch, regardless of the year, the system will not permit you to delete the record.
  + It should not be used to delete records of participants who terminated in a prior year, even if they are fully paid out.
  + Can affect
    - Reprocessing a prior year or generating reports from a prior year
    - HCE determination when top paid group election is made
    - Form 5500 beginning participant count

1. True-Up/Down Push –

When maximizing participants’ total contributions we suggest adjusting one source at a time or at least adjusting the profit sharing separately.