

STEP-BY-STEP GUIDE: YEAR END DATA COLLECTION



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Accessing the Secure Portal (also known as Plan Sponsor Link)

- Visit our website at www.greatlakespension.com and select **Plan Sponsor Login**

(248) 553-8070

PLAN SPONSOR LOGIN

GREAT LAKES
Pension Associates, Inc.

HOME OUR COMPANY SERVICES RELATIONSHIPS RESOURCES CONTACT

40 YEARS

Helping clients succeed

INSIST ON A CEFEX CERTIFIED TPA

Logging In

- Your Username is your email address
- If you are a new user, select the First time user link, enter your email address and a temporary password will be emailed to you from admin@plansponsorlink.com

GREAT LAKES
Pension Associates, Inc.

Username*
jdoe@abc.com

Password*

Remember My Username

[Forgot Password?](#) [First Time User?](#) [SIGN IN](#)

If you need to reset your password, please make sure the following email address is not blocked by your spam filter: admin@plansponsorlink.com
[Need Help using PlanSponsorLink?](#)

Online Data Collection



To begin the Year End Data Collection, select the “Begin Task” button

The screenshot shows a web application interface with a top navigation bar containing 'My Active Tasks', 'Data Collection', 'Document', 'Secure File Exchange', and 'Industry Bulletins'. Below this is a header for 'My Active Tasks' with the subtitle 'Your list of task items' and a refresh icon. A search bar labeled 'Plan Name' is present. The main content is a table with columns for 'Name' and 'Active Date'. A task entry is shown with the name 'Year End Data Collection 01/01/2026 to 12/31/2026' and an active date of '02/11/2026'. A 'Begin Task' button is located at the end of this row and is circled in red. A 'Columns' menu icon is visible on the right side of the table.

Name	Active Date	
Year End Data Collection 01/01/2026 to 12/31/2026	02/11/2026	Begin Task











Step 1: Company Contact Information

Review the address(es) and Phone Number(s) listed.

- To edit the information listed, use the Edit/Pencil button 
- To add an additional address or phone number, use Add (+) button 



When you have finished, select "Save"

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps:          

Step 1: Company Contact Information Notes (0) Save

Review the Address and Contact Numbers below. Add any new information by clicking the + button, or update existing information by clicking the paper and pencil icon. When you have completed your changes, click the Save button to continue.

Addresses		+	Contact Numbers		+
Type	Address		Type	Number	
Physical Address	37923 W. 12 Mile, Farmington Hills, MI, 48331		Phone Number	(248) 553-8070	

Save

Step 2: Employer Company Data

Carefully review and edit, if necessary, the information listed.

- If there has been a change to the EIN or entity type, please add a Note regarding the date this change was effective.

When you have finished, select “Save”

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps: General **Company** Principals Family Businesses Contact Plan 5500 Employees Approval

Step 2: Employer Company Data Notes (0) Save




Review the Employer Data below and complete or update existing information as necessary. If the company name that is listed has changed, add a Note with the updated information. When you have completed your changes, click the Save button to continue.

No	Item	Answer
1.	Company Name	ABC Sample Company
2.	EIN	99-9999999 *
3.	Fiscal Year End	12 / 31 *
4.	Entity Type	C-Corporation *
5.	NAICS Code	999999 Click here to search for your NAICS code.
6.	Payroll Provider	ADP
7.	Payroll Frequency	Bi-Weekly

Save











Step 3: Principals

Carefully review and edit, if necessary, the owner and officer information listed.

- To edit the information listed for the individual, use the Edit/Pencil button 
- To delete a Principal, use the Delete/Trash button 
- To add a Principal, use the Add (+) button 
- The total ownership percentage must be equal to 100%
- If you're a non-profit organization, make one entry using your Company Name, No Title and 100% for Ownership.
- **Be sure to include all individuals with Officer authority, even if they have no ownership. Employees with an Officer title, but no authority should not be included here.**

When you have finished, select "Save"







Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps:
 General
 Company
 Principals
 Family
 Businesses
 Contact
 Plan
 5500
 Employees
 Approval

Step 3: Principals
+ Notes (0) Save

Complete the list of owners and/or officers in your firm. Be sure to include all individuals with Officer authority, even if they have no ownership. Employees with an Officer title, but no authority should not be included here. If you're a non-profit organization, make one entry using your Company Name, No Title and 100% for ownership. The ownership percentage total will need to equal 100%. When you have completed your changes, click the Save button to continue.

[For detailed instructions on how to complete the Principals Tab Click Here and refer to page 8.](#)




Name	SSN	Is Not Employee	Title	Officer	Ownership	
Jane Doe	xxx-xx-1111	No	President	Yes	50.00%	 
John Doe	xxx-xx-2222	No	Vice-President	Yes	50.00%	 
Mike Smith	xxx-xx-3333	No	CFO	No	0.00%	 
					100.00%	

3 of 3 Records

Save











Step 4: Family Relationships

Carefully review and edit, if necessary, the information listed.

- To edit the information listed, use the Edit/Pencil button 
- To delete a record, use the Delete/Trash button 
- To add a record, use the Add (+) button 
- Be sure to **include all relatives of the Owner(s) (who are employees of the Company)**
- If a step-child has been legally adopted, select Child as the Relationship from the drop-down menu







When you have finished, select “Save”

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps:  General  Company  Principals  **Family**  Businesses  Contact  Plan  5500  Employees  Approval

Step 4: Family Relationships
Does your company employ any family members of owners of your firm? When you have entered all of your information, click the Save button.

[For detailed instructions on how to complete the Family Relationship Tab Click Here and refer to page 9.](#)




Name	SSN	Relationship	Related To	
Gary Smith	xxx-xx-4444	Child	Mike Smith	 
Jane Doe	xxx-xx-2222	Spouse	John Doe	 
Sarah Smith	xxx-xx-5555	Spouse	Mike Smith	 

3 of 3 Records

Save











Step 5: Other Businesses Owned


Carefully review and edit, if necessary, the information listed.

- To edit the information listed, use the Edit/Pencil button 
- To delete a business, use the Delete/Trash button 
- To add a business, use the Add (+) button 
- Include all other ownership interests of the Owner(s) and Officer(s)
- Owners must be added individually after the business information is added
- Qualified Plan Sponsored? – select “yes” if the other Company sponsors a Retirement Plan
- Does Company have employees? – select “yes” if other Company has non-owner employees
- If the company sponsoring this plan is owned by a foreign parent company, add any other U.S. entities also owned by the foreign parent company

When you have finished, select “Save”
















Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps:
 General
 Company
 Principals
 Family
 **Businesses**
 Contact
 Plan
 5500
 Employees
 Approval

Step 5: Other Businesses Owned
 Notes (0)
Save

Do any of the **Stockholders, Partners or Proprietors, or their Spouses, Minor Children, or Minor Children by means of an ex-spouse owning a business**, own any direct or indirect interest in other businesses? If yes, please complete below. Note: ownership should equal 100%. When you have completed your changes, click the Save button to continue.

[For detailed instructions on how to complete the Other Businesses Owned Tab Click Here](#) and refer to page 10.


Name	EIN	Phone	Date Purchased Or...	Plan Sponsor	Entity Type	Address	Employees	Owners												
XYZ Corporation	388888888	2485538070	01/01/2020	Yes	S-Corporation	1234 Maple Rd.	No	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div style="margin-right: 10px;"></div> <div></div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #2c3e50; color: white;"> <th>Name</th> <th>Ownership %</th> <th></th> </tr> </thead> <tbody> <tr> <td>John Doe</td> <td>55.00%</td> <td> </td> </tr> <tr> <td>Mike Smith</td> <td>45.00%</td> <td> </td> </tr> <tr> <td colspan="2" style="text-align: right;">100.00%</td> <td></td> </tr> </tbody> </table>	Name	Ownership %		John Doe	55.00%	 	Mike Smith	45.00%	 	100.00%		
Name	Ownership %																			
John Doe	55.00%	 																		
Mike Smith	45.00%	 																		
100.00%																				

1 of 1 Records

Save

Step 6: Contacts

Review the contacts listed for your Plan.

- A description of the Roles and Rights can be found by clicking  & then the Roles and Roles Descriptions link


Step 6: Contacts

Please verify the list of contacts that are associated with your plan. To notify us of changes that need to be made, click the Add button in the upper right corner of the grid to note your changes. If you need to add a new contact to the plan, make a note, or email your Plan Consultant. Once you have reviewed the list, click the Save button.




Roles and Rights Descriptions

For detailed instructions on how to complete the Contacts Tab [Click Here](#) and refer to page 11.

- You cannot edit the information on this screen. If you need to remove a contact, or edit the Roles/Rights of a contact, click the Add (+) button  to submit a Contact Change Request. Your consultant will then update this information once you submit the data.
- If you need to add a plan contact, click the Notes button and add a note with their name. We will contact you for further details.

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps:  General  Company  Principals  Family  Businesses  **Contact**  Plan  5500  Employees  Approval

Step 6: Contacts

Please verify the list of contacts that are associated with your plan. To notify us of changes that need to be made, click the Add button in the upper right corner of the grid to note your changes. If you need to add a new contact to the plan, make a note, or email your Plan Consultant. Once you have reviewed the list, click the Save button.



Notes (0)

Save

For detailed instructions on how to complete the Contacts Tab [Click Here](#) and refer to page 11.

Name	Contact Info	Roles	Rights	Contact Change Requests
test test	Company: test Email: test@gmail.com	Test - Assistance	Plan Documents, Administrative Forms, Employer Census, Employee Census, Reports, Contacts, Distribution, View Fiduciary Documents, Add/Edit/Delete Fiduciary Documents, Principals, Businesses, Approval, General Web Collection, Projects	Change Request

Columns

Step 7: Annual Employer Questionnaire

Read each question carefully and enter your answers into the fields to the right of each question using either the drop-down choices or entering an answer in the text box. You can save your place at any time by clicking on the “Save” button. **Step 7 will not be marked as completed until all the questions have been answered.**

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps:
 General
 Company
 Principals
 Family
 Businesses
 Contact
 Plan
 5500
 Employees
 Approval

Step 7: Annual Employer Questionnaire
Notes (0)
Save

Please provide answers to the list of questions below. You may need to use the Notes button in the upper right corner of the screen. If you are adding a note, please reference the corresponding question number. Click the Save button to save your answers and to continue to the next step.

No	Item	Answer
1.	Are there any parties that own the option to purchase stock in this Company? (They are considered to own that stock if they have the option to purchase the stock). If yes, please list in notes.	▼ *
2.	Do you have any employees who have the title of officer, but do not have the authority of an officer? (They are not included as a Key Employee for Top Heavy Testing). If yes, please add note.	▼ *
3.	Do you have any leased employees or temporary employees who have worked at least 1,500 hours in one year? If yes, please list in notes.	▼ *
4.	Are there any employees who are not listed on the employee census? If yes, please note the total number of employees and the reason they are not listed. **Due to new rules under the SECURE Act regarding part-time employee eligibility, it is very important to report ALL employees including part-time**	▼ *
5.	Do you have any union employees? Enter number of union employees, or if none, enter "0".	▼ *
6.	Did you have any employees who were absent from employment at anytime during the Plan Year as a result of performing qualified military service?	▼ *
7.	Do you currently maintain, or have you maintained in the past, any other retirement plan(s) not serviced by Great Lakes Pension? Please include terminated plans. Examples of other plans include, but are not limited to the following: 401(k) Plan, Profit Sharing Plan, Defined Benefit Plan, SIMPLE Plan, SEP, Cash Balance Plan, Money Purchase Plan. If yes, please add a note with further details.	▼ *
8.	The determination of a Controlled Group or an Affiliated Service Group ("ASG") under the qualified plan rules can be complicated. If you are unsure whether the business is part of an ASG or Controlled Group, you will need to seek legal counsel for assistance with this determination.	▼ *
9.	Is your business part on an Affiliated Service Group?	▼ *
10.	Is your business part of a Controlled Group of companies?	▼ *
11.	Are there any amendments to your plan that Great Lakes Pension did not prepare? If yes, please provide a copy of the amendment. If we do not receive a copy of the amendment, your administration may be adversely effected and additional costs incurred.	▼ *

Save

Step 8: 5500 Questionnaire

This is a list of questions that need to be answered regarding this year's Form 5500 Filing. Read each question carefully and enter your answers into the fields to the right of each question. You can save your place at any time by clicking on the "Save" button. **Step 8 will not be marked complete until all the questions have been answered.**

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps:
 General
 Company
 Principals
 Family
 Businesses
 Contact
 Plan
 5500
 Employees
 Approval

Step 8: 5500 Questionnaire
Notes (0)
Save

Please provide answers to the list of questions below. Click the Save button to save your answers and to continue to the next step.

No	Item	Answer
1.	Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser? If yes, please provide details under the note section.	_____ * ▼
2.	The Department of Labor and IRS require you to transmit employee 401(k) deferrals and loan repayments to the Plan as soon as the funds can reasonably be segregated from the Employer's assets. Upon audit, the DOL will generally apply a transmittal deadline of 0 business days following the payroll period. The DOL has finalized a safe harbor for Plans with less than 100 participants. The safe harbor will be satisfied if all employee 401(k) deferrals and loan repayments are deposited into the Plan within 7 business days of the payroll withholding. Late deposits must be reported on the annual Form 5500 filing and are required to be reported each year until corrected. If you had late deposits, a Form 5330 should be filed and "lost opportunity" interest deposited.	
3.	Based on the information provided in item #2, did you transmit employee 401(k) deferrals and loan repayments to the Plan as soon as they could reasonably be segregated from your company's assets? If you answer "no", your consultant will contact you regarding available correction methods.	_____ * ▼
4.	ERISA Fidelity Bond Coverage - Generally, every Plan official of an employee benefit plan who "handles" funds of the Plan must be bonded. An individual is considered as "handling" the funds if his or her duties or activities with respect to the Plan's funds are such that there is a risk that such funds could be lost in the event of fraud or dishonesty on the part of such individual, acting either alone or in collusion with others. The general bonding requirements are as follows:1) The bond may be in the form of an individual bond, a schedule bond, or a blanket bond. 2) An ERISA Fidelity Bond is not the same as fiduciary liability insurance. 3) The Plan must be the named insured and may not include a deductible or similar feature. 4) The minimum bond amount is the greater of: \$1,000 OR 10% of Plan assets. 5) The maximum bond amount is \$500,000 unless the Plan holds non-qualifying assets.	
5.	Do you currently maintain an ERISA Fidelity Bond which meets the above requirements?	_____ * ▼
6.	What is your current bond coverage amount?	_____ *
7.	Does your bond have an automatic increase provision?	_____ * ▼





Save

Step 9: Employee Census

Employee census information must be provided for all employees (even those not eligible to participate during the year).

There are two options for completing the Employee Census: **Manual Entry** or **File Import**

1. Manual Entry



- Employee census is individually modified by selecting the Edit/Pencil button icon to the right of each employee. 
- To add a new employee, select the Add (+) button. 
- To delete an employee, select the Delete/Trash button. 
- Detailed information regarding the requested fields can be viewed by selecting  and then **“Field Descriptions”** (also provided below)
- When you have finished entering the employee data, select **“View Summary”** to verify the compensation and contribution totals match to your gross payroll report totals. On the next step (Approval) you will be asked to provide a copy of the totals pages from your gross payroll report.

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan

Steps: General Company Principals Family Businesses Contact Plan 5500 **Employees** Approval

Step 9: Employee Census
Enter or import your employee census data using the tools below. If you export the census spreadsheet, please make changes and import the spreadsheet back in prior to completing the approval step. When you are satisfied that all of the data is correct, click the Save button to continue. [Click here to view all employees who received wages during the plan year even if they were not eligible to participate in the Plan.](#) Click on the Field Description link for an explanation of data needed.
For detailed instructions on how to submit the census data [Click Here](#) and refer to pages 14-17. Note-if you are utilizing our automatic payroll integration feature, your census data may not populate until the end of your plan year (ex- 12/31 in most cases).

Issues have been detected in the employee census records. [Click to view the issues](#)



SSN	First Name	Last Name	Gender	Date of Birth	Original Date of Hire	Date of Termination	Termination Reason	Date of Release	Hours	
111-11-1111	Jane	Doe	Female	01/01/1950	01/01/2000				2,01	 

1 of 1 Records











Save



Employees menu options: Import, Copy Prior Year Census Data, View Summary, Field Descriptions, Export, Delete All Employees

2. File Import

- Export the census provided by using the **Export** function (you can export the file as Excel .xls or .xlsx). To export, select  and then "Export". Save the exported spreadsheet to your computer, modify the census data in the spreadsheet, add any new employees after the last row of employee data. Verify the compensation and contribution totals on the spreadsheet match your gross payroll report totals and then **Import** the file back into the Online system. To import, select  and then "Import", then select a file or drag & drop the file into the box.
- You can also import a spreadsheet from your payroll files. **You will need to make sure the sheet is named "Employees"**. When importing, you will be asked to match up your column headings to the system column headings.
- **Spreadsheets containing formulas in any cell will not import.** In order to remove formulas from your spreadsheet: Highlight all cells in your spreadsheet, Ctrl+C to copy, right click and Paste Special (Values).


Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan



Steps:  General  Company  Principals  Family  Businesses  Contact  Plan  5500  Employees  Approval

Step 9: Employee Census
Enter or import your employee census data using the tools below. If you export the census spreadsheet, please make changes and import the spreadsheet back prior to completing the approval step. When you are satisfied that all of the data is correct, click the Save button to continue. [include all](#)   [Notes \(0\)](#) [Save](#)

[employees who received wages during the plan year even if they were not eligible to participate in the Plan.](#) Click on the Field Description link for an explanation of data needed.

For detailed instructions on how to submit the census data [Click Here](#) and refer to pages 14-17. Note-if you are utilizing our automatic payroll integration feature, your census data may not populate until the end of your plan year (ex- 12/31 in most cases).

 Issues have been detected in the employee census records. [Click to view the issues](#)


SSN	First Name	Last Name	Gender	Date of Birth	Original Date of Hire	Date of Termination	Termination Reason	Date of Rehire	Hour
111-11-1111	Jane	Doe	Female	01/01/1950	01/01/2000				2,01  

1 of 1 Records

[Save](#)

Census Validation for Manual Entry and File Import

When you save the census data, you will receive a warning or error message if there are issues detected. Review the issues, edit the census information (if necessary), and select "Save".

 Issues have been detected in the employee census records. [Click to view the issues](#)

Some Common Issues:

- Employees missing hours worked. See field descriptions below
- Employees missing compensation – Compensation must be provided for all employees. If the employee is an owner and receives a Schedule C or K-1, enter \$1 for the compensation field and attach the Schedule C or K-1
- 401(k) Plans Only - In most cases, at least one employee will have deferrals. Please make sure you have entered the dollar amount of actual 401(k) deferrals for each employee
- **Spreadsheets containing formulas in any cell will not import. In order to remove formulas from your spreadsheet: Highlight all cells in your spreadsheet, Ctrl C to copy, right click and Paste Special (Values)**

Census Field Descriptions

Employee Census Field Descriptions Year End Data Collection 01/01/2026 to 12/31/2026

Display Name	Format	Description
SSN	123-45-6789 or 123456789	Enter the employee's Social Security number
First Name	Text characters	Enter the employee's first name
Last Name	Text characters	Enter the employee's last name and any suffix (Jr., Sr., etc)
Gender	Male or Female	Choose Male (M) or Female (F) from the dropdown list
Date of Birth	MM/DD/YYYY	Enter the employees date of birth, or use the calendar picker to select the correct date
Original Date of Hire	MM/DD/YYYY	Enter the employees original date of hire, or use the calendar picker to select the correct date
Date of Termination	MM/DD/YYYY	Enter the employees date of separation, or use the calendar picker to select the correct date
Termination Reason	Text field	Termination Reason - vountary (quit) or in-voluntary (laid off or fired)
Date of Rehire	MM/DD/YYYY	Enter the employees date of rehire, or use the calendar picker to select the correct date
Gross Compensation	Number Field (#####) or (#,###.##)	Gross compensation including pre-tax deferrals (401(k), 403(b), 457(b), SEP and 125 Cafeteria). Include any non-severance compensation (i.e. accrued sick pay, vacation pay, holiday pay, etc.) following termination of employment. However, exclude true severance pay in this field and enter in field titled "Severance Pay"
Hours	Number Field (###)	For employees that worked 1000 hours or more in the plan year, enter 1000. For employees with less than 1000 hours, enter actual hours worked
Pre-Tax 401(k) Salary Deferral	Number Field (#####) or (#,###.##)	Enter the salary deferral amount shown in Box 12a of Form W-2 for codes D, E or G
Roth 401(k) Salary Deferral	Number Field (#####) or (#,###.##)	Enter the salary deferral amount shown in Box 12a of Form W-2 for codes AA or BB
Safe Harbor Deposited per Payroll-enter total YTD	Number Field (#####) or (#,###.##)	For plans that contribute safe harbor contributions during the year, please enter the amount contributed.
Job Classification	Text characters	Your plan may exclude certain classes of employees or allocate contributions to different classes of employees. If your plan does not utilize this information, this field can be left blank. Only complete this field if spreadsheet has already been prepopulated for the prior participants, if it hasn't the plan does not use this.
Company Division	Text characters	If you track a location for employees, please add here. Divisions can be any combination of letters and/or numbers. Only complete this field if spreadsheet has already been prepopulated for the prior participants, if it hasn't the plan does not use this.
Union Employee	Checkbox	Check the box to mark the employee as a union member
Active Military	Checkbox	Check the box to mark the employee as actively serving in the military
Severance Compensation	Number Field (#####) or (#,###.##)	Payments of compensation made to an employee following their severance of employment which are paid under the terms of a severance agreement. These amounts are not included in the Plan's definition of compensation.
Note	Text characters	Enter a note


Columns

Step 10: Approval and Census Submission

Approval and Census Submission is the final step in the process!

- Documents – Please upload a copy of the totals page from your Year-End Gross Wage/Payroll report. If there are additional items you would like to submit, attach them here as well. Use the **+** button to add documents.
- Notes – add any additional notes necessary with the bottom **+** button.
- Review your information before clicking on the Sign and Submit button to complete the process. If a prior step is incomplete, you will get an error message to go back and complete information.
- Once you click “Sign and Submit” you will be asked to enter your name and email address. You will then receive an email from **no-reply@pensionpro.com** confirming that your submission is complete.

Task Year End Data Collection 01/01/2026 to 12/31/2026 for ABC Sample 401(k) Plan


Steps: General ✓ Company ✓ Principals ✓ Family ✓ Businesses ✓ Contact ✓ Plan ✓ 5500 ✓ Employees ✓ Approval 



Step 10: Approval & Census Submission
Year-End Gross Wage Report: Please reconcile gross wages provided on your census submission with the year-end gross wage report from your payroll records. **Provide a copy of the totals page(s) from your gross wage (payroll) report by selecting the green plus button under the Documents section below and attaching the file.**


The Plan Administration process can not begin until census information reconciles to the Gross Wage Report provided. If there are discrepancies between the gross wages provided on the census and the gross wages on the payroll report, make a note under the Notes section below indicating the reason for the difference.

General
 Company
 Principals
 Family
 Businesses
 Contact
 Plan
 5500
 Employees

PLEASE READ CAREFULLY BEFORE SUBMITTING YOUR CENSUS COLLECTION
Please review the information you are about to submit. This information will be used in processing your retirement plan's compliance reports and in satisfying the reporting and disclosure requirements of the Department of Labor. If you have any questions, or need additional assistance, please contact your Consultant by clicking on the contact button at the top right hand corner of your screen.

Documents 

Name	Type	Description	
Gross Payroll Report.xlsx	Payroll Report (Totals)		  Download

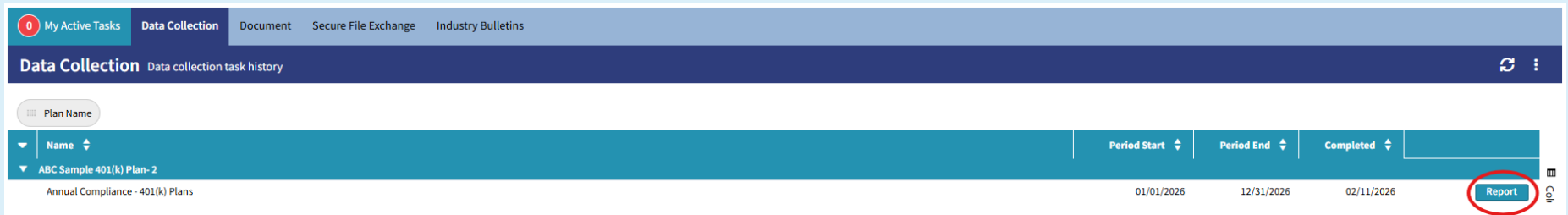
Notes 

Note	Date	Created By
No Rows To Show		

[Sign and Submit](#)

Summary of Data Collection

After you have completed the Year End Data Collection process, it will be removed from your My Active Tasks Dashboard and appear on the Data Collection Tab. To review the data you submitted, click on the Report button to open a file containing the submitted information.



The screenshot shows a web application interface with a navigation bar at the top containing 'My Active Tasks', 'Data Collection', 'Document', 'Secure File Exchange', and 'Industry Bulletins'. Below the navigation bar is a header for 'Data Collection' with a sub-header 'Data collection task history'. A search bar labeled 'Plan Name' is present. The main content is a table with columns: 'Name', 'Period Start', 'Period End', 'Completed', and 'Report'. The 'Report' button is circled in red.

Name	Period Start	Period End	Completed	Report
ABC Sample 401(k) Plan-2	01/01/2026	12/31/2026	02/11/2026	Report
Annual Compliance - 401(k) Plans				

Thank you for completing the online Data Submission!