Demographic Report Generation Instructions

Overview

These instructions provide guidance for generating a properly formatted demographic report from a payroll system.

The Goal: Create a single, comprehensive file containing detailed demographic and employment information for each employee.

File Format Requirements

Structure

☑ All data must be contained in a **single tab/worksheet**

☑ **"Flat" format** with a header row **in row one** and corresponding data populated in the rows below

Employee Name	Employee Identifier	Date of Birth	Date of Hire	Date of Term	Date of Rehire
Adams, Aria	EMP1071	02/16/1982	03/15/2023		
Bolton, Maeve	EMP2100	07/22/1998	06/20/2024		
Clay, Nolan	EMP1312	12/02/1987	02/12/2009	07/01/2024	
Dalton, Oscar	EMP1466	11/01/2001	10/25/2015	01/15/2024	06/30/2024
Daniels, Josephine	EMP1248	08/26/1993	08/31/2024		

Acceptable File Types

☑ Excel (.xls or .xlsx)

☑ Comma-separated values (.csv)

❌ Please note that PDFs **cannot be processed.**

Required File Contents

Level of Detail

The report must show **individual demographic records by employee** for all employees paid during the audit period.

✅ **Correct Detail:** <u>One row per employee</u>.

Employee Name	Employee Identifier	Date of Birth	Date of Hire	Date of Term	Date of Rehire
Adams, Aria	EMP1071	02/16/1982	03/15/2023		
Bolton, Maeve	EMP2100	07/22/1998	06/20/2024		
Clay, Nolan	EMP1312	12/02/1987	02/12/2009	07/01/2024	
Dalton, Oscar	EMP1466	11/01/2001	10/25/2015	01/15/2024	06/30/2024
Daniels, Josephine	EMP1248	08/26/1993	08/31/2024		

❌ **Incorrect Detail:** Summary or aggregated data. Files that do not contain a single header row with one line of data by employee will produce inaccurate results.

Name	Adams, Aria	Bolton, Maeve	Clay, Nolan	Dalton, Oscar	Daniels, Josephine
Employee Identifier	EMP1071	EMP2100	EMP1312	EMP1466	EMP1248
Date of Birth	02/16/1982	07/22/1998	12/02/1987	11/01/2001	08/26/1993
Date of Hire	03/15/2023	06/20/2024	02/12/2009	10/25/2015	08/31/2024
Date of Term			07/01/2024	01/15/2024	
Date of Rehire				06/30/2024	

Date Range

Ensure the report covers the complete audit period with appropriate start and end dates. The range should include all employees paid during the period under audit.

Employee Information

❗ **Required Fields:**

- **Employee Name** (can be in one column or separated into first/last name columns)
- **Employee Identifier** (Protected SSN, Employee ID, etc.)
  - *Ensure that the identifier used matches the identifier in the file containing employee-level payroll detail (i.e., payroll register, payroll detail file, etc.).*

Employee Name	Employee Identifier	Date of Birth	Date of Hire	Date of Term	Date of Rehire
Adams, Aria	EMP1071	02/16/1982	03/15/2023		
Bolton, Maeve	EMP2100	07/22/1998	06/20/2024		
Clay, Nolan	EMP1312	12/02/1987	02/12/2009	07/01/2024	
Dalton, Oscar	EMP1466	11/01/2001	10/25/2015	01/15/2024	06/30/2024
Daniels, Josephine	EMP1248	08/26/1993	08/31/2024		

Demographic Data

ℹ️ **Optional Fields:**

- Demographic fields typically needed to perform audit procedures include:
  - Date of birth
  - Date of hire
  - Date of termination
  - Date of rehire
  - Pay rate
  - Employee type
    - Ex: Full-time, part-time, union, salary, hourly
- If you are unable to gather any of the above fields, consult with your auditor.

File Preparation Checklist

✅ Header Row Placement

Ensure column headers appear in **Row 1** of the file. If headers are in a different row, delete all rows above the header row (verify no essential data is removed).

✅ Single Header Row

Verify that the file has only **one header row**. Remove any sub-headers or secondary header rows, as these will prevent accurate processing.

✅ Single Row of Data for Each Employee

Ensure each employee only has one line of data. Multiple rows of information for a single employee may produce inaccurate results.

✅ Complete Data

Each row pertains to a single employee, with all employment and demographic data included.