



Census File Formatting Guide

Ensure accurate uploads by formatting your census correctly



Key Rule: Row 1 must contain only column headers.

Your employee roster with elections should be on the first sheet/tab of the file.



Row 1 Should NOT Include

- Company or group name
- Effective dates
- Brokerage or agency name
- Agent or broker contact info
- Notes, SIC codes, or extra formatting



Row 1 SHOULD Include

- First Name
- Last Name
- Date of Birth
- Coverage Tier
- Zip Code, Salary, Job Title, etc.

Visual Example

Incorrect Format

Group Name:	Disney					
Address:	1234 Disney Way, Anaheim, CA					
Agent:	Walt Disney			Effective: 05/01/2026		
EE#	First	Last	Sex	DOB	Zip	Salary
1	Mickey	Mouse	F	3/22/98	32830	55000

Correct Format

First Name	Last Name	Sex	DOB	Zip	Salary	Title
Mickey	Mouse	F	3/22/98	32830	55000	Ops Spec
Donald	Duck	M	12/5/99	32836	60000	E-Com
Goofy	Goof	F	6/14/97	32821	95000	Sr. Mgr
Minnie	Mouse	F	9/2/99	32819	52000	CX Spec

↑ Headers in Row 1



Why does this matter?

DropQuote reads Row 1 as column headers. If Row 1 is not census headers, it may exclude unwanted columns.



One tab only — no hidden sheets

For best results, your census file should contain only one tab with the employee roster. Remove or delete any additional tabs (rate sheets, plan summaries, scratch work) and confirm there are no hidden tabs in the workbook.



Do not password-protect the file

Census files must not be password protected or encrypted. DropQuote cannot open protected files, and the upload will fail. Remove any password before uploading.

Questions? Reach out — we're happy to help with formatting.

We're actively improving how census files are read — proper formatting ensures the best results now.