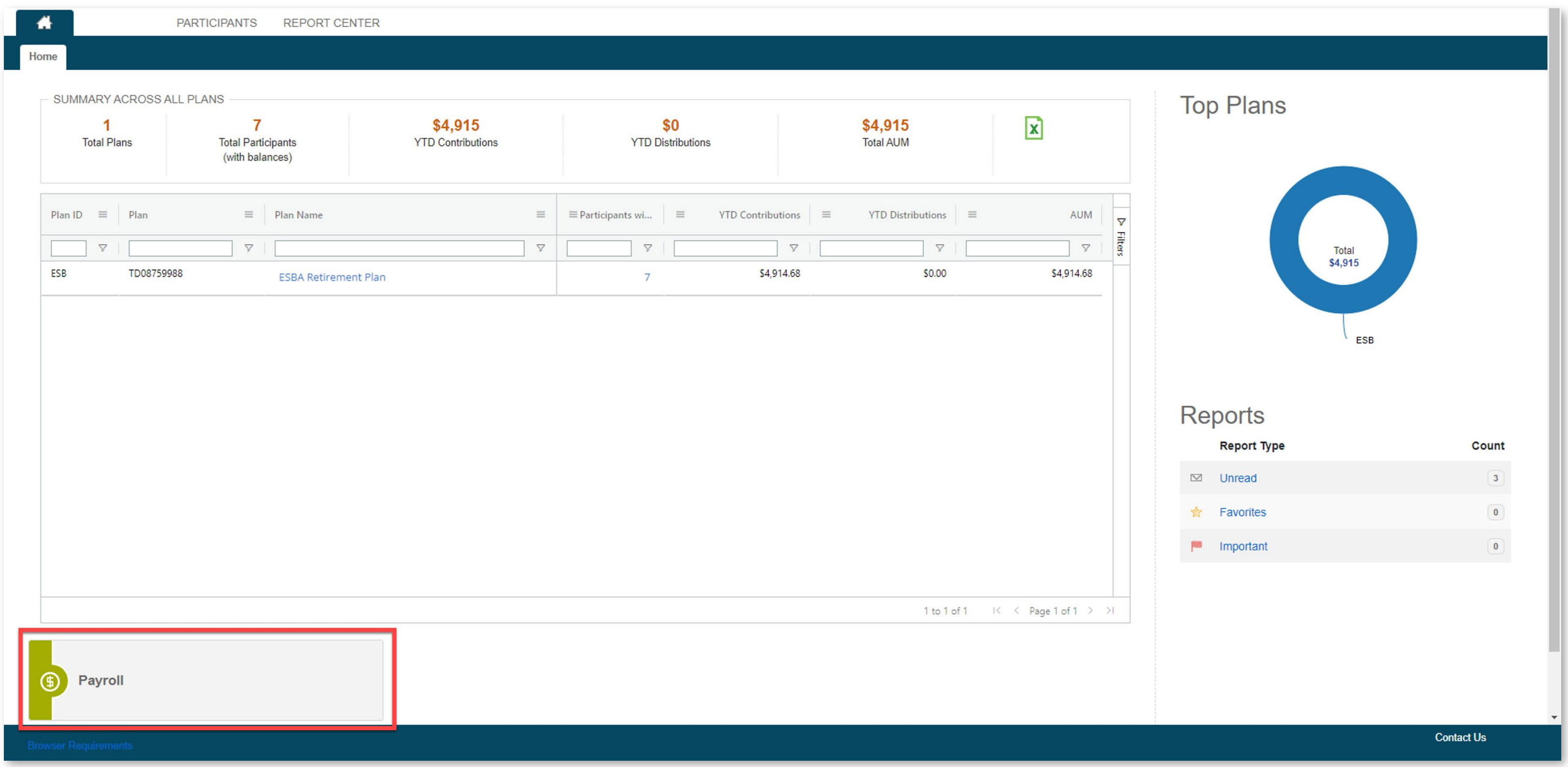
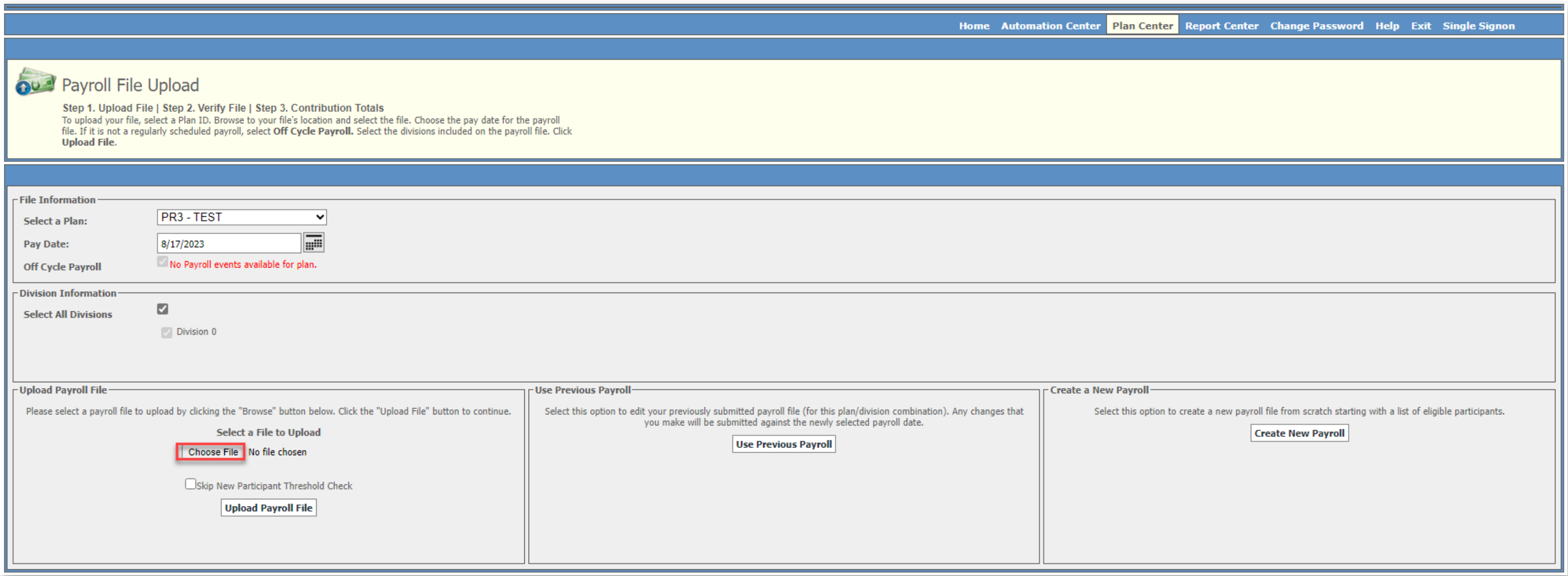
Uploading a payroll file for your ESBA plan

Before starting, ensure that you are using the correct payroll template for your plan. You can download a template from the [ESBA help page].

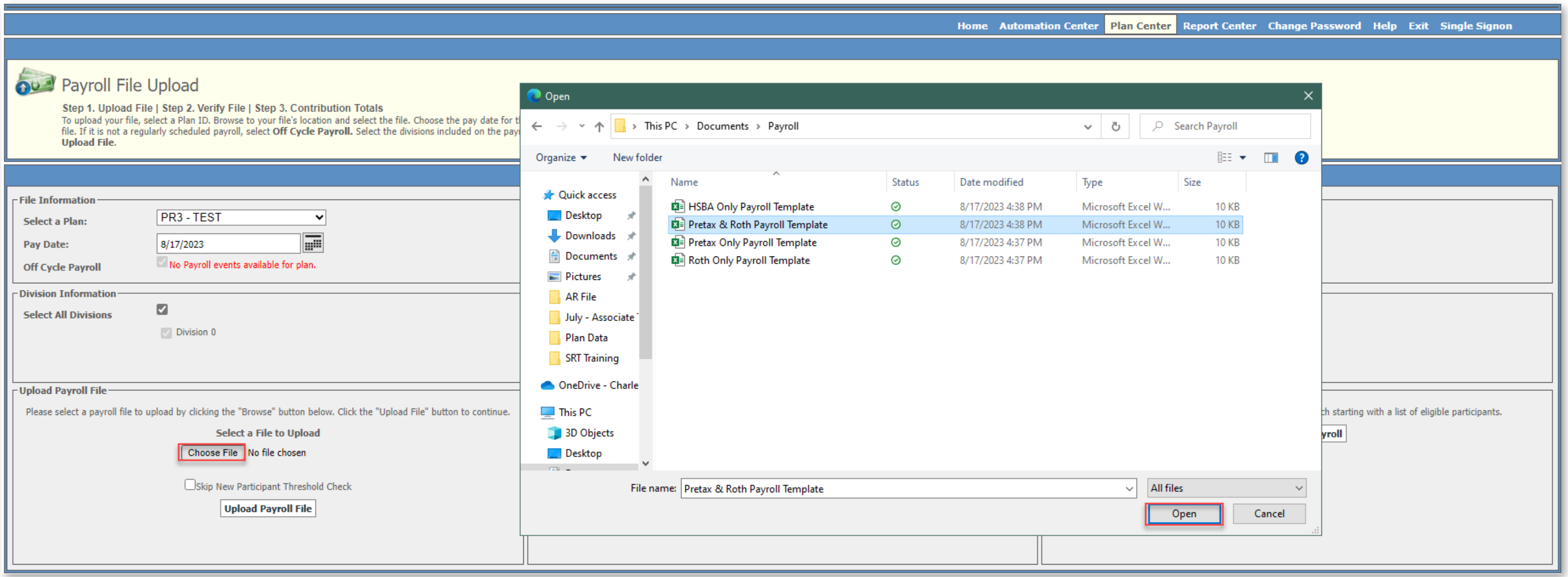
1 Log in to Schwab ESBA Connect and click the **Payroll** button at the bottom of the home page.



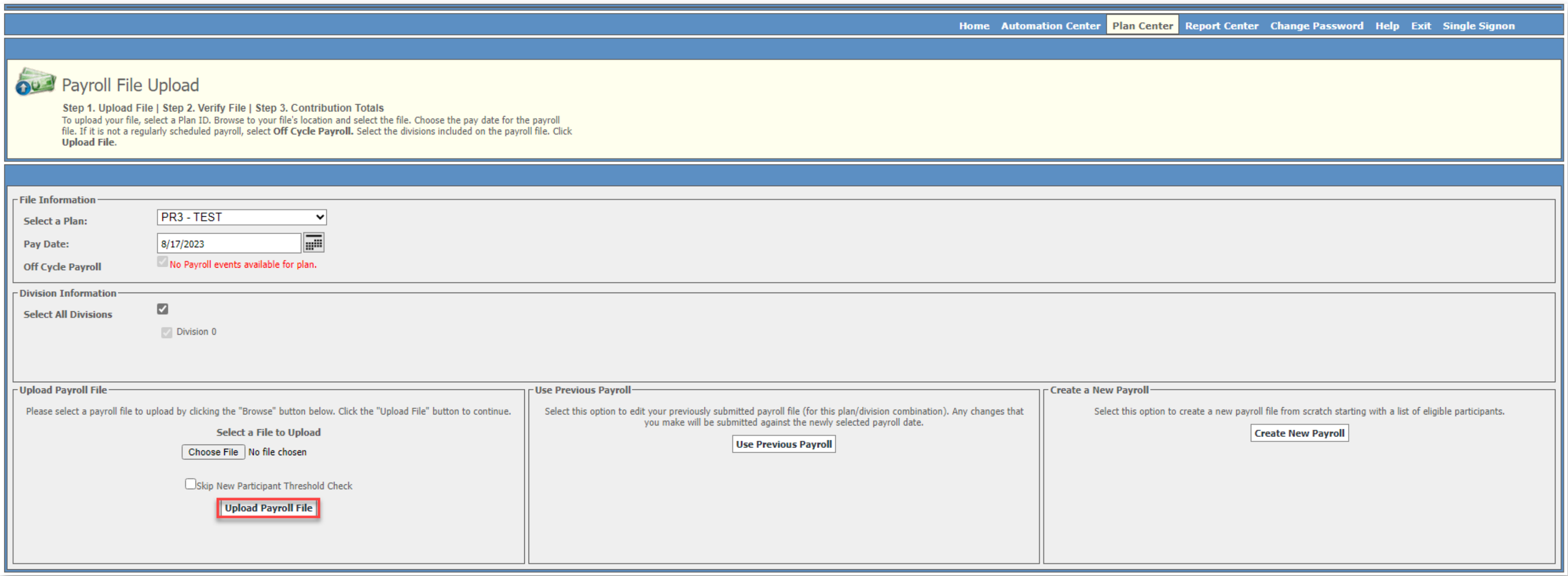
2 Click **Choose File** under **Upload Payroll File**.



3 Browse for you payroll file to upload and click **Open**. The file must be an Excel (.xlsx) file.



4 Click **Upload Payroll File.**



5 Select your Excel worksheet. Your financial template should be selected already. Check the box **I agree that my data looks correct** and then click **Submit File For Edit**.