Paylocity Download Guide - Year 2021
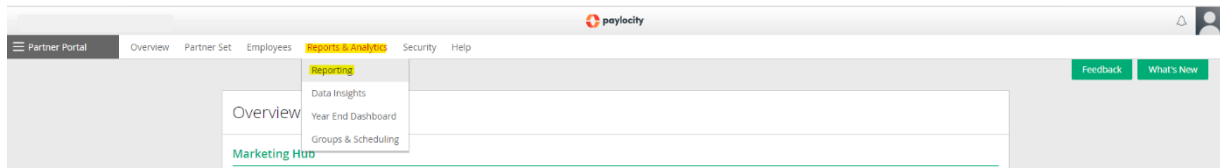
Prepared by: **Pension Services, Inc**

1) Download 401(k) Census Report.

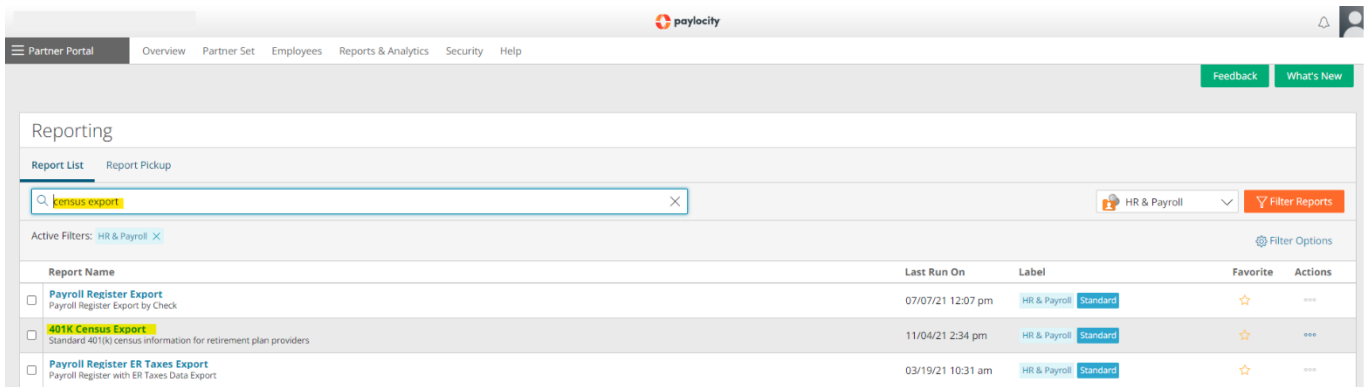<u>Paylocity home page</u>

      a. Locate Reports & Analytics Section.

      b. On dropdown menu, search for "Reporting" and click.

<u>Reporting List</u>

      a. Under Reporting find search by name, type "Census Export"

      b. List will get updated, and then select "401K Census Export", depending on your account type you might simply see this as "Census export"

401K Census Export

    a.   Ensure you select the following parameters for the report.

        I.   **Output-**
Output type: **Excel 2007+(.xlsx)**
Output File Name: **Census_Export** (or your preferred name, we recommend that you do not leave blank spaces)

        II.   **Payroll Filters-**
Year To Date: **Prior**

        III.   **Standard filters-**
ALL for all options (see image for details).

        IV.   **Report Options-**
SSN: **Show**

        V.   **Additional Filters-**
Include Term'd EEs: **Include All EE's**

        VI.   **Show YTD Date: YTD Only**

    b.   After selecting the correct parameters, click on the <u>Run</u> button and select "**Go to Pickup**"

Reporting Pickup

      a.   Under "**Report Pickup**," finds the report labeled "**Census_Export**" or your chosen name.

      b.   Click the **XLSX** icon to download and save a copy of the report.

   c.   Once you open the saved report, it should look similar to the sample below:

In addition, we suggest that you provide compensation for the last two quarters of the year. It is relatively easier to pull a second report once logged on the Paylocity portal. We need (Q3-Q4) compensation since most plans have a semi-annual plan entry.

Please review and complete the instructions:

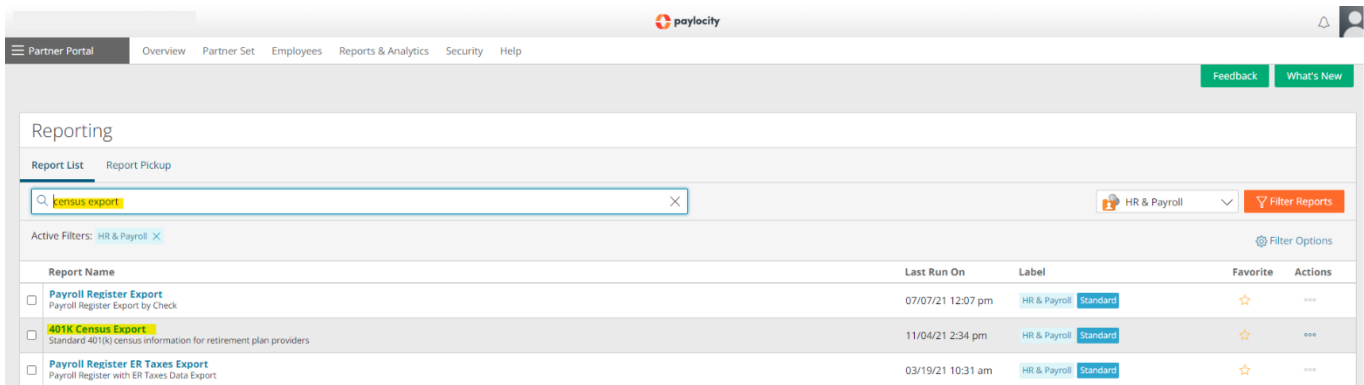## 1) Download another export Census Report for Partial Compensation

<u>Paylocity home page</u>

    a. Locate Reports & Analytics Section
   b. On the dropdown menu, search for "Reporting" and click.
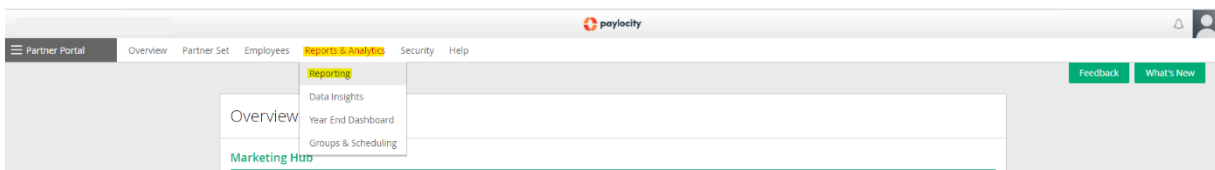
<u>Reporting List</u>

    c. Under-report find search by name type "Census Export"
    d. List will get updated and then select "Census Export"

401K Census Export for Partial Compensation

a. Ensure you select the following parameters for the report.

   I. **Output-**
      Output type: **Excel 2007+(.xlsx)**
      Output File Name: **Census_Export_Q3-Q4** (or your preferred name, we recommend that you do not leave blank spaces)

   II. **Payroll Filters-**
      Select pay period last two quarters from payroll.
      Process Date From (use the first payroll date of month of July (e.g., Format 07/DAY/YEAR))

   III. Process Date To (use the last payroll date of month of December (e.g., Format 12/DAY/YEAR))

   IV. **Standard filters-**
      ALL for all options (see image for details).

   V. **Report Options-**
      SSN: **Show**

   VI. **Additional Filters-**
      Include Term'd EEs: **Include All EE's**
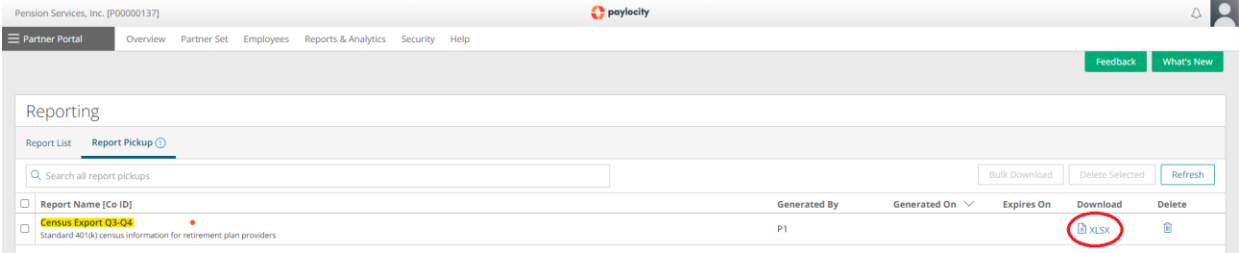   **Show YTD Date: Check Dates**
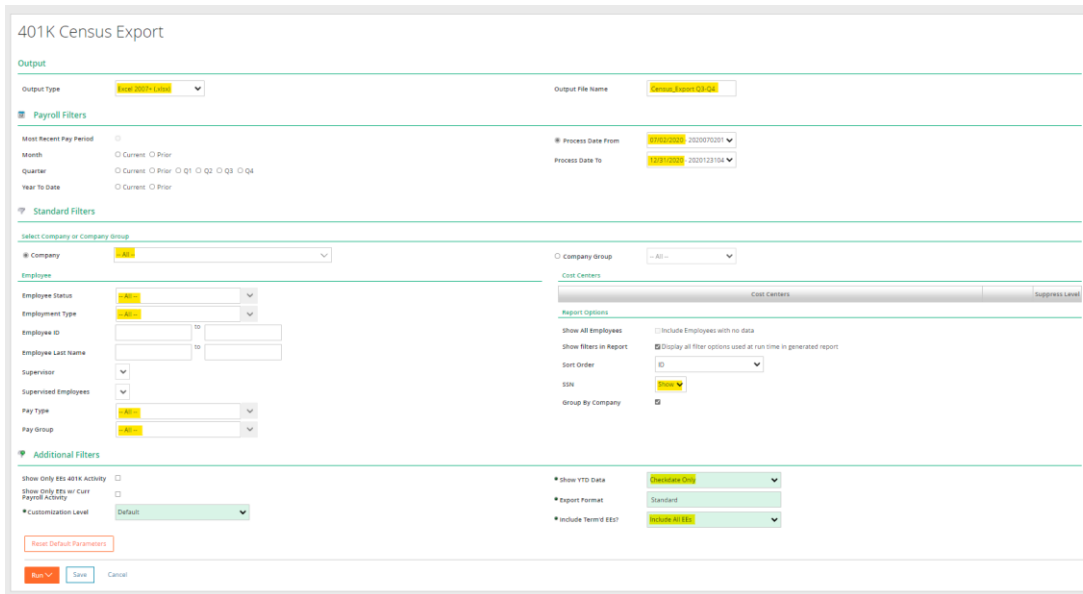
b. After selecting the correct parameters, click on the run and select "Go to Pickup."
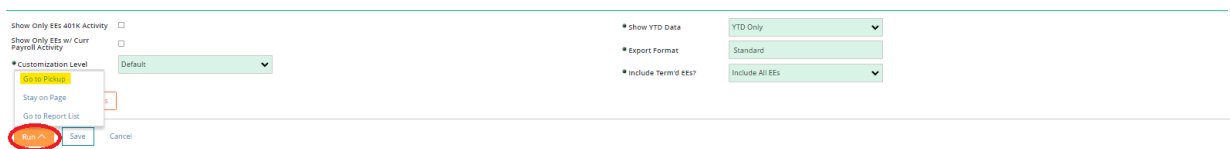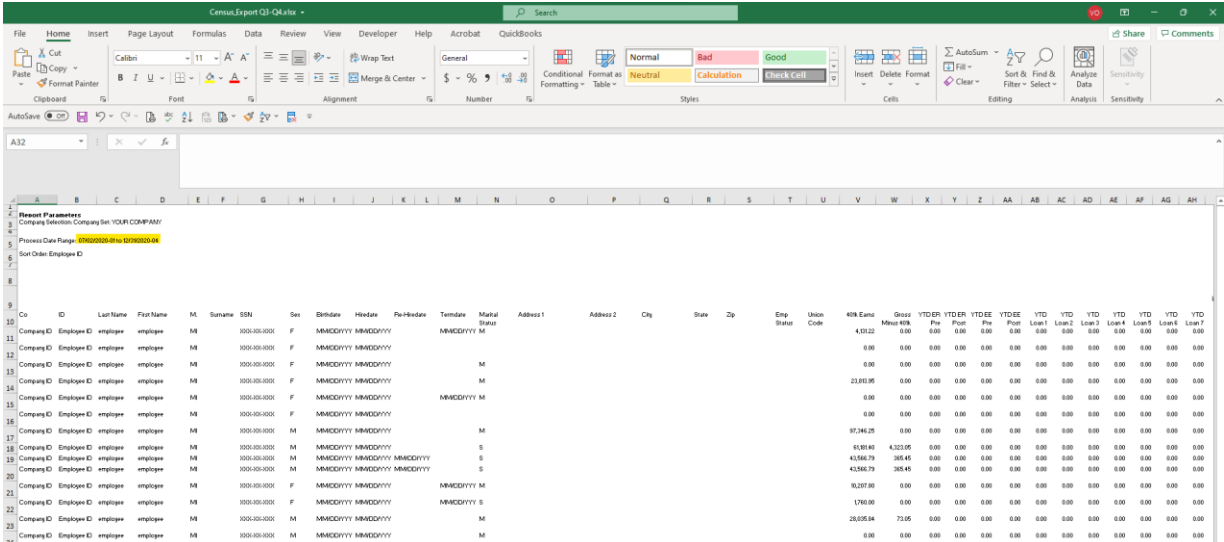
Reporting Pickup

        d.   Under "**Report Pickup**," finds the report labeled "**Census_Export Q3-Q4**".

        e.   Click the **XLSX** icon and save a copy of the report.

        f.   Once you open the saved report, it should look like the sample below:

1) Download W-2 Forms.

Also, you are required to provide us with copies of W-2 forms for all your employees. Unfortunately, the location from where you download W2/W3 may vary according to the Paylocity portal. Please consult with your payroll provider if you cannot locate W2/W3 forms and ensure to please provide W2/W3 copies. Otherwise, without W2/W3 reports, your submission will be considered incomplete.

Final note:

Once you obtain all these reports and information from your payroll provider portal, you should proceed to complete our template request for the Census. With these reports, you have all the necessary data to prepare your census report successfully.

We strongly suggest using our Census guide to verify how to input map all this information correctly on our template. This will significantly expedite your time required to complete the request.