### Paylocity Guide 2024

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On the Paylocity homepage, look for the upper menu and select **Reports &** Analytics.

|  |   | 🛟 paylocit  | r                                     |                |                  |
|--|---|---|---------------------------------------|----------------|------------------|
| Partner Portal Overview Part               | ner Set Reports & Analytics See                                     | curity  |                                       |                |                  |
| Overvie<br>Marketin                        | Reporting<br>Data Insights<br>year End Dashboard<br>Cash Management |   |                                       |                |                  |
| E Part                                     | mer Mai Report Groups   | Amplify Partner Set   | Reports & Analytics                   | Security       | News             |
| Co-bra     Produc     Plug &     View Reso | nding Templates<br>t Datasheets<br>Play Campaigns<br>urrces 🗹       | and the ber<br>• Read about<br>• See Prograf<br>Learn More VIEW | Reporting<br>Data Insights            |                | d payroll world. |
| Clients                                    | About Adding Clients  | eting Hub   | Year End Dashboard<br>Cash Management |                |                  |
| Company                                    |   | Partner Mai   | Report Groups                         | - <u>&amp;</u> | ess (i)          |
|  |   | Even dine Tomat   |                                       |                |                  |

2 On the new reports page, select **All Reports**, then click on the search bar.

| Partner Portal Overview Partner Set Reports & Analytics Security   Reporting   Report List   Report List   Report List   Report Security   Saved Reports   Favorites   All Reports   Casta Epilor     All Reports   Casta Epilor     Last Run On        Workspace  |                               |   | 4               | paylocity   |           |
|--|-------------------------------|---|-----------------|-------------|-----------|
| Report List Report Pickup   Scarch by name, description, or begin typing a sentence. For example, "I need a list of birthdays in April"     All Reports   (affault view)     Autive Filters:   Workspace:   H & Payroll ×   Saved Reports   Eavorites     Image: A count Environ     Last Run On   | ≡ Partner Portal              | Overview Partner Set Reports & Ana        | lytics Security |             |           |
| Report List Report Pickup   Schedules  Search by name, description, or begin typing a sentence. For example, "I need a list of birthdays in April"  All Reports (default view)     All Reports  Active Filters: Workspace: HR & Payroll ×  Saved Reports  Favorites  Conta Filter  Bulk Run  Conta Filter  Last Run On Workspace   | Reporting                     |   | 0               |             |           |
| All Reports<br>default view) All Reports Active Filters: Workspace: HR & Payroll × Favorites Favor | Report List Report Pickup Sch | nedules                                   |                 |             |           |
| Report Templates Saved Reports Favorites Active Filters: Workspace: HR & Payroll ×           Saved Reports           Favorites           Image: Saved Reports           Image: Saved Reports           Favorites           Image: Saved Reports           Image: Saved Reports     <   | All Reports<br>(default view) | All Reports                               | ays in April:   |             |           |
| Favorites  | Report Templates              | Active Filters: Workspace: HR & Payroll × |                 |             |           |
| Name ^ Last Run On Workspace   | Favorites                     | 1 Filter 🔒 Bulk Run 🗅 Organi              | ze 🗸            |             |           |
|  | + Create Folder               | Name 🔨                                    |                 | Last Run On | Workspace |
|  |                               |   |                 |             |           |
|  |                               |   |                 |             |           |
|  |                               |   |                 |             |           |

#### 3 In the search bar, type **401k Census Export** and then click **Search**.

|  | O paylocity  | A (                                   |
|--|--|---------------------------------------|
| ■ Partner Portal 0v  | verview Partner Set Reports & Analytics Security   |                                       |
| Reporting  | type here 401k Census Export   | Help                                  |
| type here 401k Census Export   |  | X Q Search                            |
| Q     Search type here 401k Census Ex       Top Search Results <sup>10</sup> | ved Search   | 2 Clear A                             |
| 401K Census Export ■ Standard = Ten  | mplane   | - 20 of 84 ite                        |
| TPA 401K Census ■ Standard = Saved     TPA 401K Census ■ Standard = Temple   | J<br>slate   | Actions                               |
| 2 401K Census Export (copy) ■ Standar  | rd # Saved   | ***                                   |
|  | 401 K Report 03/28/2023 11:28 am HR & Payroll Constant Seveel  | <u>نه</u> ۰۰۰                         |
|  | 401 K Report (copy)<br>Summary or deal of 401(k) payroll activity 03/20/2024 11:58 am HR & Payroll Soviet  | · · · · · · · · · · · · · · · · · · · |
|  | 401K Census Export         03/20/2024 11:59 am         HR & Payroll         Soundard Template           Sandard 401(k) census information for retirement plan providers         03/20/2024 11:59 am         HR & Payroll         Soundard Template | <u>é</u>                              |
|  | 401K Census Export     3ander4 401(b) consus information for retirement plan providers     10/28/2024 02:50 pm     HR & Payroll     Samder5  | \$                                    |
|  | 401K Census Export (copy)     3andard 401(6) consus information for retirement plan providers     03/20/2024 10:01 am     HR & Payroll     Sandard 500(6)  | <u>\$</u>                             |
|  | 401K Census Export (copy) - Sandard 401(k) census information for retirement plan providers - HR & Payroll Saved   | <u>م</u>                              |

Locate the corresponding report from the search results.

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| oorts<br>: view) | Search Results   |         |
|------------------|--|---------|
| t Templates      | Filter 🗄 Bulk Run 🗀 Organize 🗸   |         |
| Reports          |  |         |
| tes              | Name   | Last R  |
| ate Folder       | TPA 401K Census<br>TPA 401k Census Report  | 10/12/2 |
|                  | 401 K Report     Summary or detail of 401(k) payroll activity  | 10/28/2 |
|                  | 401K Census Export     Standard 401(k) census information for retirement plan providers  | 10/28/2 |
|                  | 401K Census Export     Standard 401(k) census information for retirement plan providers  | 03/20/2 |
|                  | Fidelity Advantage 401(k) PEP Onboarding Export           Represents personal data required by Fidelity Investments to establish employees for the Fidelity Advantag | -       |
|                  | 401K Loan Listing<br>401(k) loan deduction totals by employee for the selected check date range  |         |
|                  | Voar To Date Pepert - DC   |         |

Once the **401k Census Export** report is open, select **Prior Year to Date** for the payroll filters. Please keep in mind that this filter can be changed to obtain the specific period you may need.

|   | A paylocity                              | <b>▲</b> (   |
|---|--|--------------|
| E Partner Portal Overview Partner S   | Reports & Analytics Security             |              |
|   |  | Help         |
|   |  |              |
| 401K Census Export  | Timeframe (required)                     | Save 🗸 Expor |
| ilters Sample   | O Current Month                          |              |
|   | O Prior Month                            |              |
| ascription<br>andard 401(k) census information for retirement plan provider | O Current Vear to Date                   |              |
|   |  |              |
| Payroll Filters   | Prior Year to Date                       |              |
| Timeframe (required)  |  |              |
| O Current Month   | Current Quarter     O Process Date Range |              |
| Current Versite Date  | O Prior Quarter From                     |              |
| Refor Year to Date  | O Quarter 1                              |              |
| · Phor real to Date   | O Quarter 2                              |              |
|   |  |              |
|   |  |              |
| Company Set or Company Group Filters  |  |              |
| Company   | Company Group                            |              |
| ۲   | ▼ 0                                      |              |
| Employee Filters  |  |              |
| Employee Status   | Employee Type                            |              |
| Select Item(s) to filter by   | Select item(s) to filter by              |              |
| Employee ID   | Employee Last Name                       |              |
| Start Dange   | Start Bases                              |              |

The rest of the fields should remain blank as you reach the bottom. Under **Show YT Data**, select the options to match the settings shown in the image below: check **Date Only**, **Standard**, and **Include All EEs**.

| O Prior Month   | O Prior Quarter | From   |                                |        |
|---|-----------------|--|--------------------------------|--------|
| O Current Year to Date  | O Quarter 1     |  | $\sim$                         |        |
| Prior Year to Date  | O Quarter 2     | То   |                                |        |
|   | O Quarter 3     |  | $\checkmark$                   |        |
|   | O Quarter 4     |  |                                |        |
| △ Company Set or Company Group Silters  |                 |  | Show YTD Data (required)       |        |
| Company Secon company aroup meets   |                 | Company Group  |                                |        |
| Company   |                 |  | Checkdate Only                 | $\sim$ |
|   | ~               | 0  | Export Format (required)       |        |
| ∽ Employee Filters  |                 |  | Standard                       |        |
| Employee Status   |                 | Employee Type  |                                |        |
| Select Item(s) to filter by   | $\sim$          | Select item(s) to filter by  | Include Term'd EEs? (required) |        |
| Employee ID   |                 | Employee Last Name   | Include All EEs                | $\sim$ |
|   |                 |  |                                |        |
| Start Range to Er   | nd Range        | Start Range to End Range   |                                |        |
| Start Range to Er   | nd Range        | Start Range to End Range   | 1                              |        |
| Start Range to Er Pay Type Select item(s) to filter by  | nd Range        | Start Range to End Range Pay Group Select item(s) to filter by   |                                |        |
| Start Range to Er Pay Type Select Item(s) to filter by  | nd Range        | Start Range to End Range Pay Group Select (Items) to filter by   |                                |        |
| Start Range to Er Pay Type Select Item(s) to filter by Additional Filters   | ∼ Nange         | Start Range to End Range Pay Group Select Item(s) to filter by   |                                |        |
| Start Range to Er Pay Type Select Items) to filter by Additional Filters Show Only Es 401K Activity   | nd Range        | Start Range to End Range Pay Group Select (Items) to filter by Show YTD Data (required)  |                                |        |
| Start Range     to     Er       Pay Type       Select Items) to filter by   | nd Range        | Start Range to End Range Pay Group Select Items) to filter by Show YTD Data (required) Checkdate Only  |                                |        |
| Start Range     to     Er       Pay Type     Select Itemt(s) to filter by       Select Itemt(s) to filter by                                  | nd Range        | Start Range to End Range Pay Group Select (Items) to filter by Show YTD Data (required) Checkdate Only Export Format (required)  |                                |        |
| Start Range to Er Pay Type Select Item(5) to Iter by Additional Filters Show Only EEs w/ Curr Payroll Activity                                | ∼               | Start Range to End Range Pay Group Select Item(S) to filter by Show YTD Data (required) Checkdate Only Export Format (required) Standard                               |                                |        |
| Start Range to Er Pay Type Select Item(s) to Iter by Additional Filters Show Only EEs w/ Curr Payroll Activity Customization Level (required) | nd Range<br>✓   | Start Range to End Range Pay Group Select Item(5) to filter by Show YTD Data (required) Checkdate Only Export Format (required) Standard Include Term( EEs? (required) |                                |        |

**7** Once you have finished adjusting the fields, click on **Export**.

| _                          |                       |                |                   |                      | eaylocity            |        |        | <b>A (2)</b>  |
|----------------------------|-----------------------|----------------|-------------------|----------------------|----------------------|--------|--------|---------------|
| E Partner Port             | Overview              | Partner Set    | Reports & Analyti | cs Security          |                      |        |        |               |
|                            |                       |                |                   |                      |                      |        |        | Help          |
| 401K Caracia               | From event            |                |                   |                      |                      |        |        |               |
| 401K Census                | Export                |                |                   |                      |                      |        |        | Save V Export |
| ilters Sample              |                       |                |                   |                      |                      |        |        |               |
| escription                 |                       |                |                   |                      |                      |        |        | More Info     |
| tandard 401(k) census info | mation for retirement | plan providers |                   |                      |                      |        |        | Morenno       |
|                            |                       |                |                   |                      |                      |        |        |               |
| Payroll Filters            |                       |                |                   |                      |                      |        | Export |               |
| Timeframe (required)       |                       |                |                   |                      |                      |        | EXPOIL |               |
| O Current Month            |                       |                | O Current Quarter |                      | O Process Date Range |        |        |               |
| O Prior Month              |                       |                | O Prior Quarter   |                      | From                 |        |        |               |
| O Current Year to Date     |                       |                | O Quarter 1       |                      |                      | $\sim$ |        |               |
| Prior Year to Date         |                       |                | O Quarter 2       |                      | То                   |        |        |               |
|                            |                       |                | O Quarter 3       |                      |                      |        |        |               |
|                            |                       |                | O Quarter 4       |                      |                      | •      |        |               |
| Company Set or Compa       | ny Group Filters      |                |                   |                      |                      |        |        |               |
| Company                    |                       |                |                   | Company Group        |                      |        |        |               |
|                            |                       |                | $\sim$            | 0                    |                      | $\sim$ |        |               |
| _                          |                       |                |                   |                      |                      |        |        |               |
| Employee Filters           |                       |                |                   |                      |                      |        |        |               |
| Employee Status            |                       |                |                   | Employee Type        |                      |        |        |               |
| Select Item(s) to filter   | У                     |                | $\sim$            | Select Item(s) to fi | ter by               | $\sim$ |        |               |
| Employee ID                |                       |                |                   | Employee Last Nan    | e                    |        |        |               |
|                            |                       |                |                   |                      |                      |        |        |               |

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8 The export window will pop up. Ensure that the settings are configured as shown in the image below: select **Excel 2007 (xlsx)** and check **Sort Order ID** and **SSN Show**. Then click **Run** 

| paylocity                   | Export                                  | Run Cancel              |
|-----------------------------|---|-------------------------|
|                             | Export Name<br>_ExportCensus            | 2 Dynamic Options       |
|                             | Export Type<br>Excel 2007+ (.xlsx)      | File Extension Override |
| 1                           | Format                                  |                         |
|                             | ID V                                    |                         |
|                             | SSN (Social Security Number)            |                         |
|                             | Display Filter Options Used at Run Time |                         |
| Process Date Range     From | Group By Company                        |                         |
| То                          |   |                         |
|                             |   |                         |

#### 9 After this, go back to the **Reports & Analytics** page and select **Reporting**.

|   |  | 🛟 pay                    | locity     |  |          |        | L .             | ۹   |
|---|--|--------------------------|------------|--|----------|--------|-----------------|-----|
| Partner Portal Overview Partner Set   | Reports & Analytics Sec  | urity                    |            |  |          |        | Help            |     |
| Your report is generating. You may wait here to download or download       < 401K Census Export       Filters     Sample       Description       Standard 401k() census information for retirement plan providers | Reporting<br>Data Insights<br>Year End Dashboard<br>Cash Management<br>Report Groups | Pa                       | ortner Set | Reports & Analytics Reporting Data Insights Year End Dashboard | Security | Save 🗸 | Expo<br>More In | ort |
| Payroll Filters Timeframe (required) Current Month Prior Month  | O Current Quarter<br>O Prior Quarter   | O Process Date -<br>From |            | Cash Management<br>Report Groups                               | _        |        |                 |     |
| Current Year to Date  Prior Year to Date  | Quarter 1 Quarter 2 Quarter 3 Quarter 4  | То                       |            | ×<br>×   |          |        |                 |     |
| Company Set or Company Group Filters Company  | Company Gr   | oup                      |            | ~  |          |        |                 |     |
| Employee Filters Employee Status Select temps to filter by  | Employee Ty<br>Select item   | /pe<br>(s) to filter by  |            | ~  |          |        |                 |     |

#### **10** On the **Reporting** page, click on **Report Pickup**.

|                             | C payloo  | city                |              |                   |     |
|-----------------------------|---|---------------------|--------------|-------------------|-----|
| Partner Portal              | Overview Partner Set Reports & Analytics Security   |                     |              |                   |     |
|                             |   |                     |              |                   |     |
| Reporting                   |   |                     |              |                   |     |
| Report List Report Pickup 1 | Schedules   |                     |              |                   |     |
| 401k Census report          |   | _                   |              |                   |     |
| All Reports                 | Separch Report List Report Pickup 1 Schedule  | 25                  |              |                   |     |
| (default view)              |   |                     |              |                   |     |
| Saved Reports               | Filter 🗄 Bulk Run 🖾 Organize 🗸  |                     |              | К < 1             | 2 > |
| Favorites                   | Name  | Last Run On         | Workspace    | Report Type ①     | F   |
| + Create Folder             | TPA 401K Census TPA 401k Census Report  | 10/12/2023 01:36 pm | HR & Payroll | Standard Template |     |
|                             | 401 K Report     Summary or detail of 401(k) payroll activity   | 10/28/2024 02:47 pm | HR & Payroll | Standard Template |     |
|                             | 401K Census Export     Standard 401(k) census information for retirement plan providers   | 10/28/2024 02:50 pm | HR & Payroll | Standard Saved    |     |
|                             | 401K Census Export     Standard 401(k) census information for retirement plan providers   | 03/20/2024 11:59 am | HR & Payroll | Standard Template |     |
|                             | Fidelity Advantage 401(k) PEP Onboarding Export Represents personal data required by Fidelity Investments to establish employees for the Fidelity Advantage |                     | HR & Payroll | Dynamic Template  |     |
|                             | 401K Loan Listing<br>401(k) loan deduction totals by employee for the selected check date range   | -                   | HR & Payroll | Standard Template |     |
|                             | Vear To Date Report - P5 Detailed summary of earnings, taxes, & deductions  | 03/15/2024 10:27 am | HR & Payroll | Standard Template |     |
|                             | Comprehensive Demographic Rept  | -                   | HR & Pavroll | Standard Template |     |

# 11 Under **Report Pickup**, locate the exported report you just created and select **Download as XLSX**.

|                             |                                     |              | Help                                      |
|-----------------------------|-------------------------------------|--------------|---|
| Reporting                   |                                     |              | Create Report 🗸                           |
| Report List Report Pickup 1 | Schedules                           |              |   |
| Clear All Filters           | Q. Search all report pickups        |              |   |
| enerated On Clear           |                                     |              |   |
| Today                       | , L Download Zip 🕅 Delete 🕻 Refresh |              |   |
| Yesterday                   |                                     |              |   |
| Last 7 Days                 | Report Name [Co ID]                 | Generated By | Generated On ✓ Expires On Download Delete |
| Last 31 Days                | ExportCensus                        |              | 💽 xisx 🚽 😑 🗕                              |
| Custom                      |                                     |              |   |
| ad Status Clear             |                                     |              |   |
| Unread                      |                                     |              |   |
| Read                        |                                     |              |   |
| le Type Clear               |                                     |              |   |
| CSV                         |                                     |              | 1 - 4 of 4 item                           |
| pdf                         |                                     |              |   |
| xlsx                        |                                     |              |   |

## 12 The report is now available in the browser's **Downloads** section or in the local **Downloads** folder on your computer.

| avlocity     | Downloads         | ΒQ         | ··· \$   | ٢       |
|--------------|-------------------|------------|----------|---------|
| <b>_</b>     | ExportCensus.xlsx | 0          | ŵ        | •       |
|              |                   |            |          |         |
|              |                   |            |          | Help    |
|              |                   |            | e R      | eport 🗸 |
|              |                   |            | _        |         |
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| Generated By | Generated On ∨ I  | Expires On | Download | Delete  |
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|              |                   |            |          |         |
|              |                   |            |          |         |