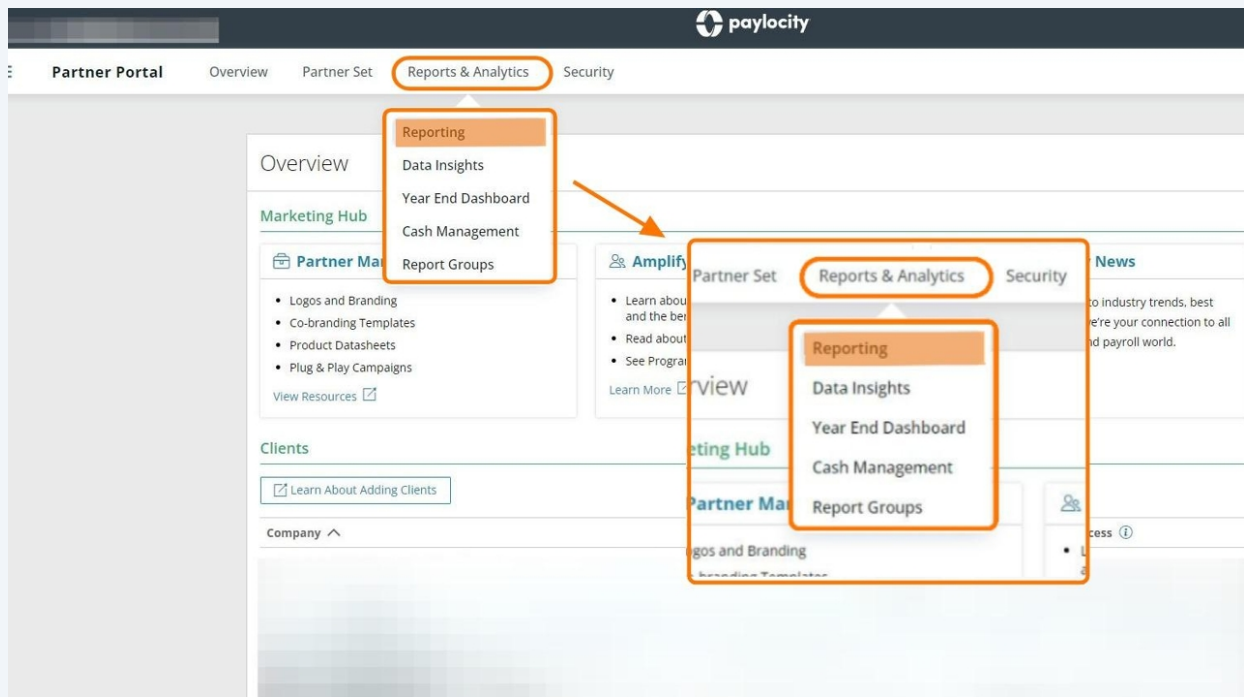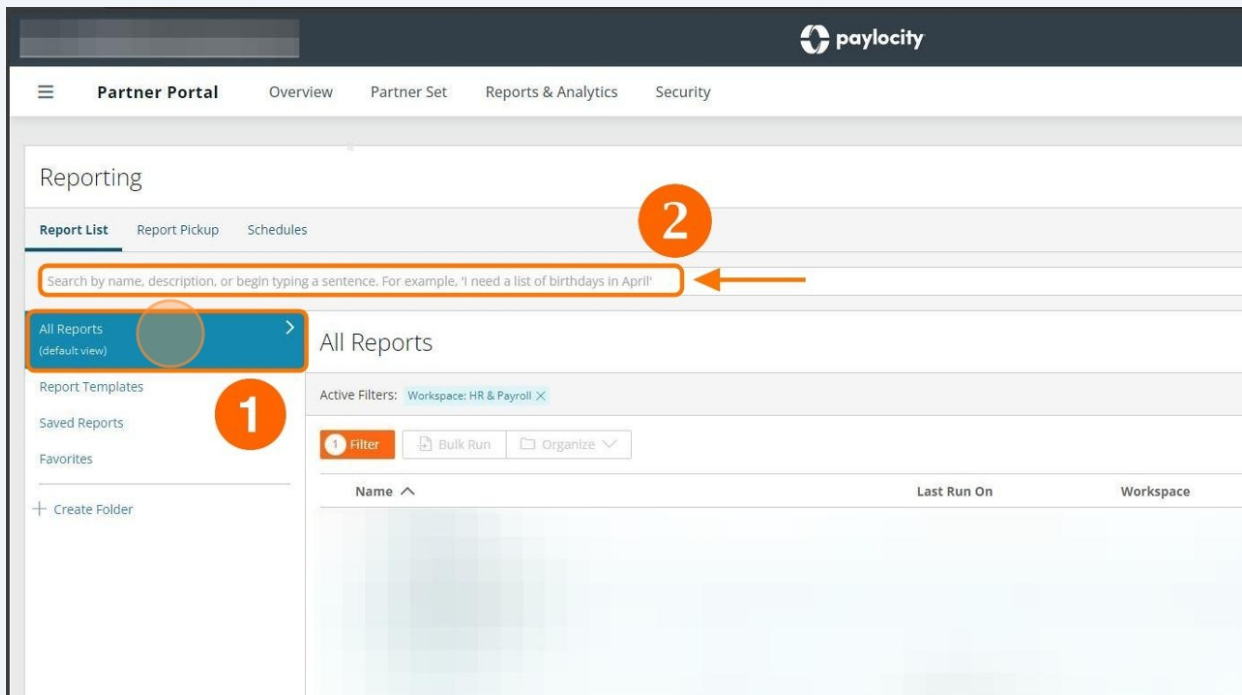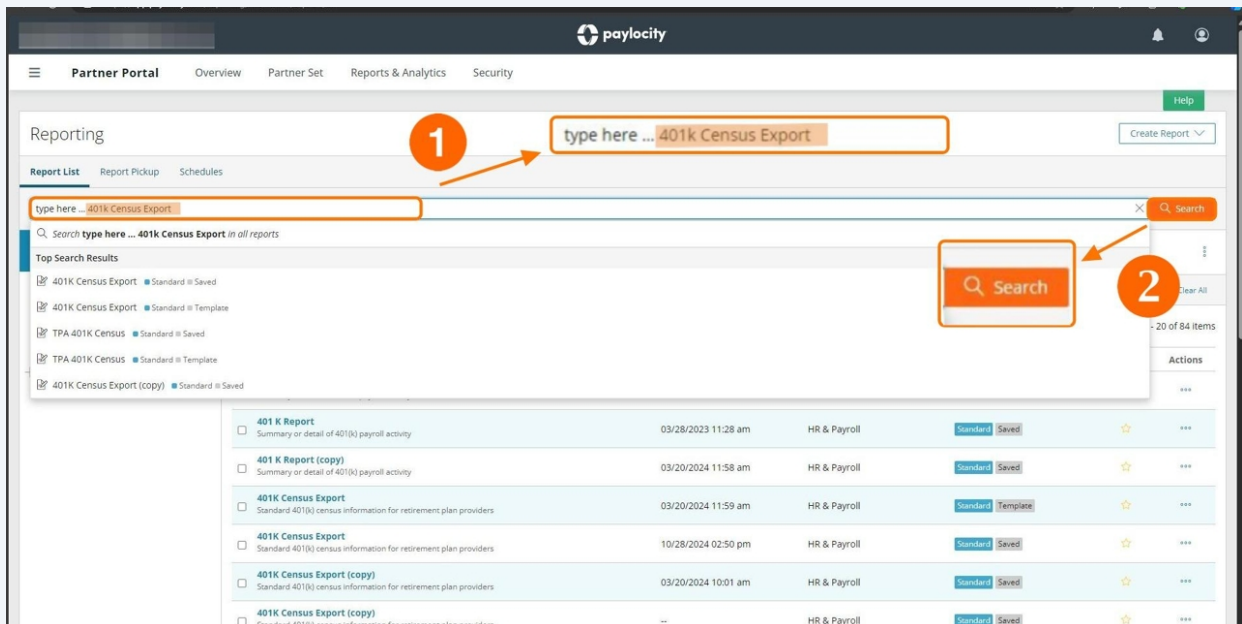# Paylocity Guide 2024

1 On the Paylocity homepage, look for the upper menu and select **Reports & Analytics**.
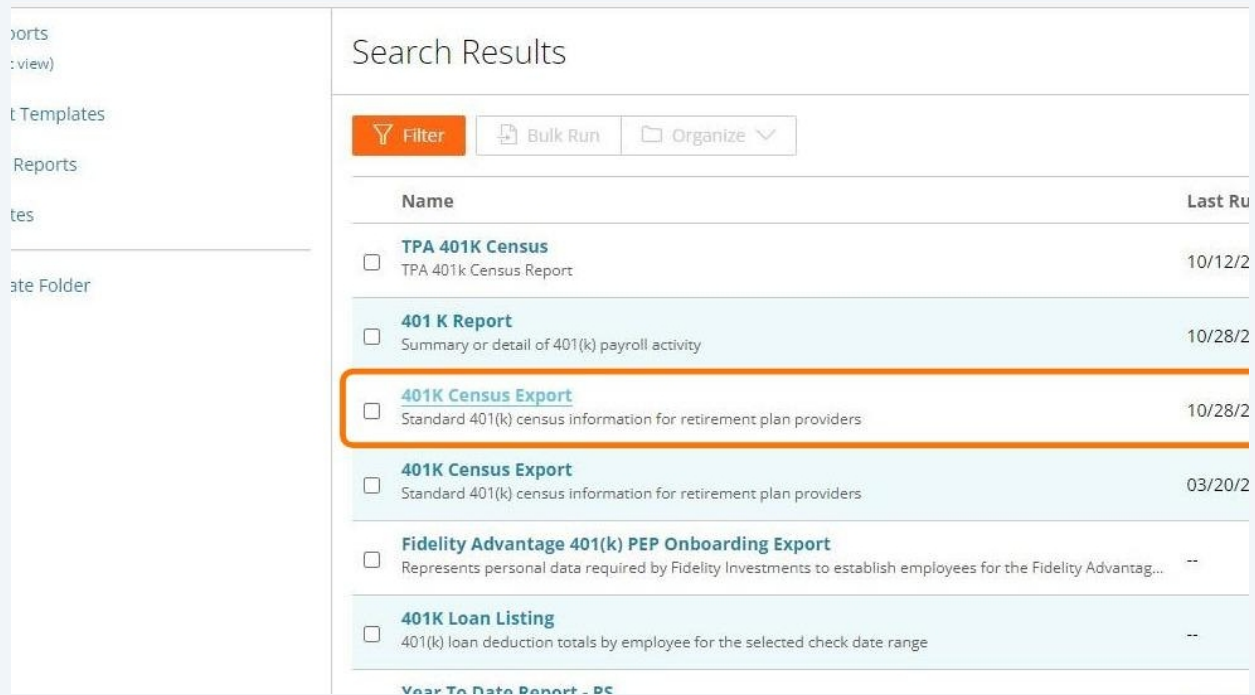
**2**   On the new reports page, select **All Reports**, then click on the search bar.

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

4 Locate the corresponding report from the search results.

5 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.
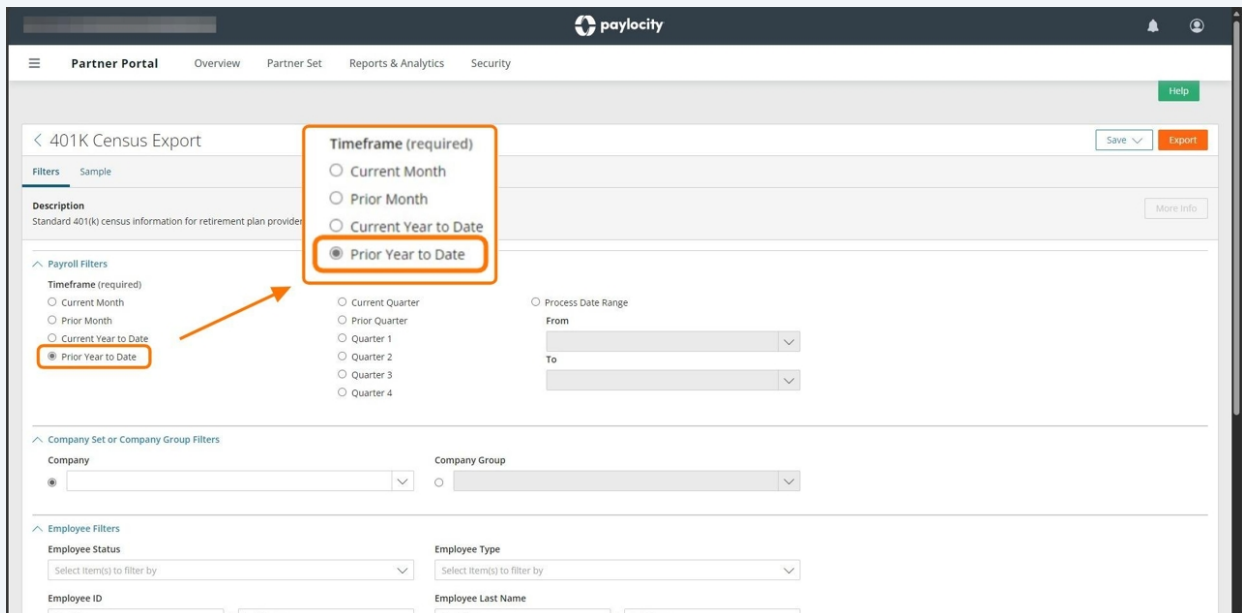
6 The rest of the fields should remain blank as you reach the bottom. Under **Show YT Data**, select the options to match the settings shown in the image below: check **Date Only**, **Standard**, and **Include All EEs**.

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

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**

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

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

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

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