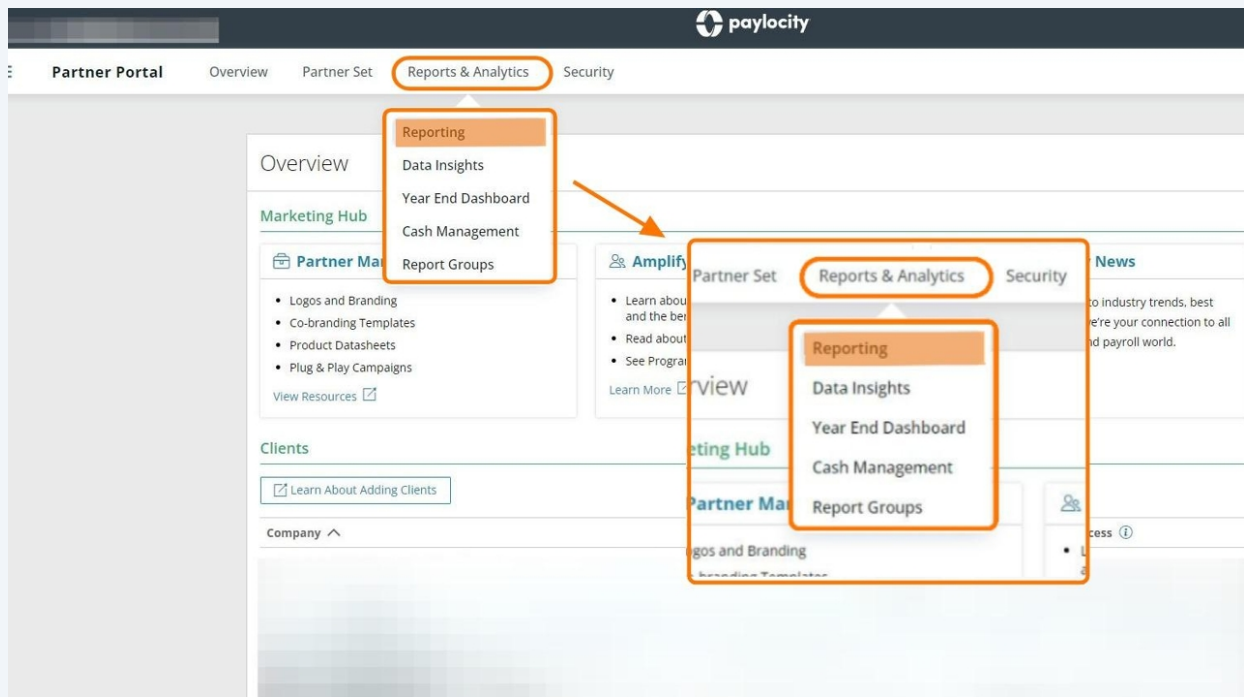


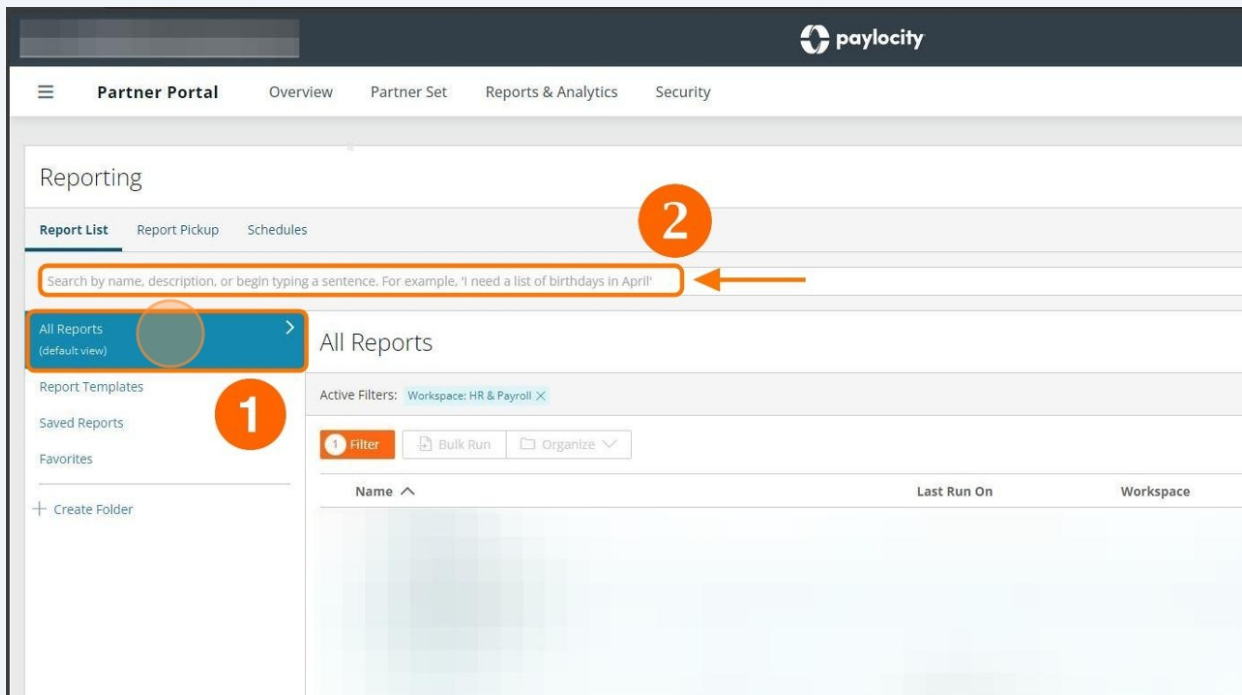
Paylocity Guide 2024

1

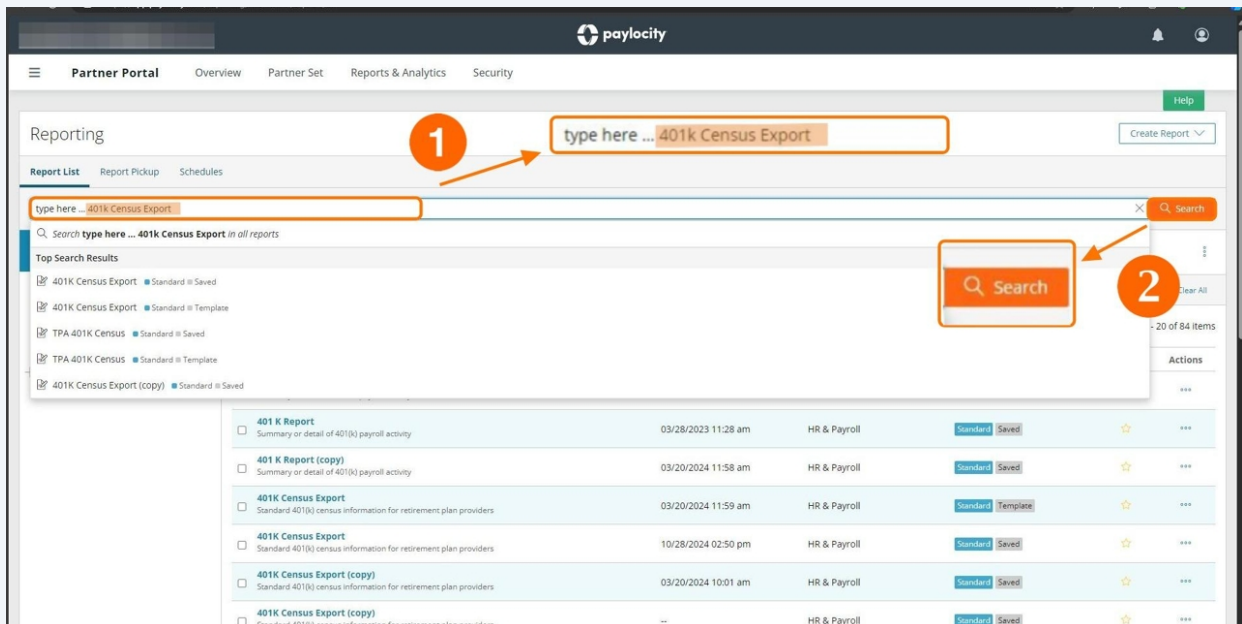
On the Paylocity homepage, look for the upper menu and select **Reports & Analytics**.



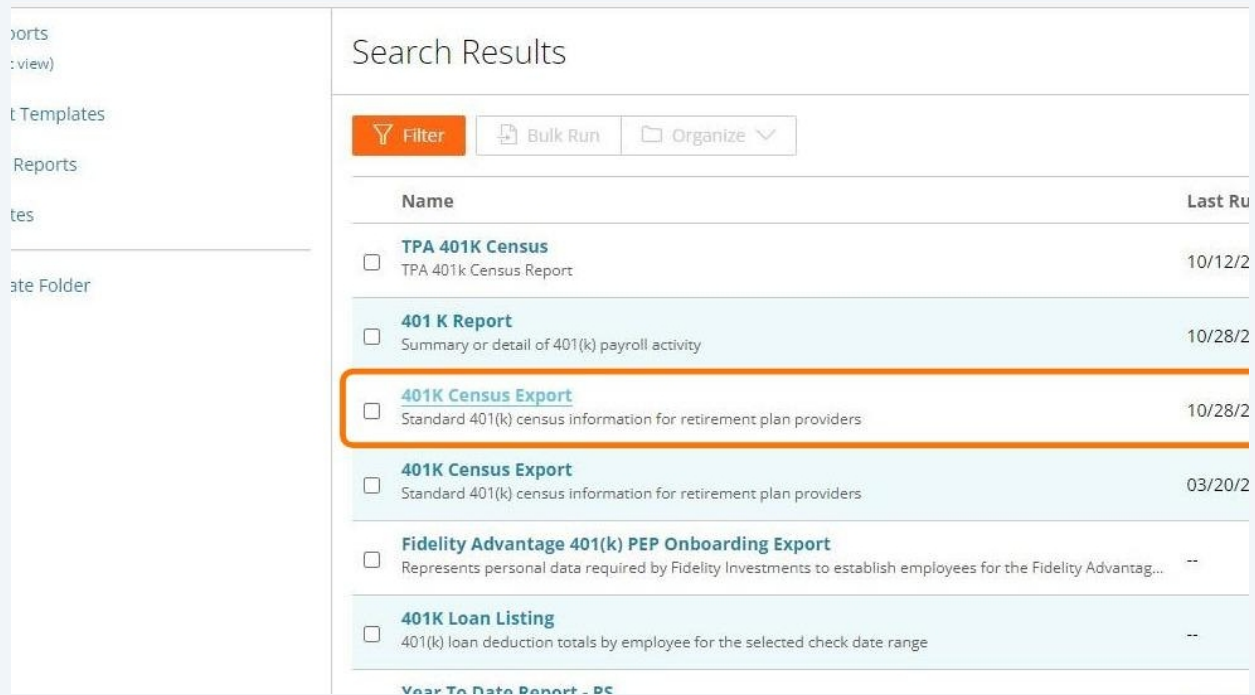
2 On the new reports page, select **All Reports**, then click on the search bar.



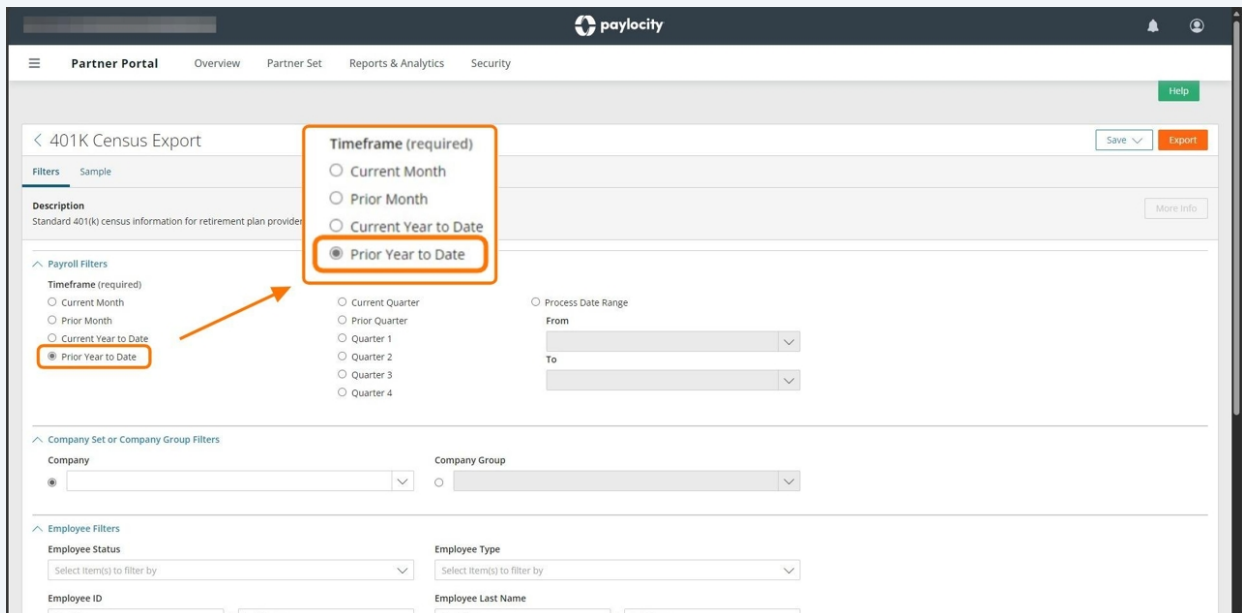
3 In the search bar, type **401k Census Export** and then click **Search**.



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 YTD Data**, select the options to match the settings shown in the image below: check **Date Only**, **Standard**, and **Include All EEs**.

Prior Month
 Current Year to Date
 Prior Year to Date

Prior Quarter
 Quarter 1
 Quarter 2
 Quarter 3
 Quarter 4

From: []
To: []

Company Set or Company Group Filters
Company: [] Company Group: []

Employee Filters
Employee Status: [] Employee Type: []
Employee ID: [] Employee Last Name: []
Pay Type: [] Pay Group: []

Additional Filters
Show Only EEs 401K Activity:
Show Only EEs w/ Curr Payroll Activity:
Customization Level (required): []

Show YTD Data (required)
Checkdate Only []
Export Format (required)
Standard []
Include Term'd EEs? (required)
Include All EEs []

7

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

paylocity

Partner Portal Overview Partner Set Reports & Analytics Security

401K Census Export

Save [] Export []

Filters Sample

Description
Standard 401(k) census information for retirement plan providers

Payroll Filters
Timeframe (required)
 Current Month
 Prior Month
 Current Year to Date
 Prior Year to Date

Current Quarter
 Prior Quarter
 Quarter 1
 Quarter 2
 Quarter 3
 Quarter 4

From: []
To: []

Company Set or Company Group Filters
Company: [] Company Group: []

Employee Filters
Employee Status: [] Employee Type: []
Employee ID: [] Employee Last Name: []

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**

Export

Export Name: _____ Dynamic Options

Export Type: Excel 2007+ (.xlsx) File Extension Override: _____

Format

Sort Order: ID

SSN (Social Security Number): Show

Display Filter Options Used at Run Time

Group By Company

Run Cancel

9

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

Partner Portal Overview Partner Set Reports & Analytics Security

Reporting

Data Insights

Year End Dashboard

Cash Management

Report Groups

401K Census Export

Filters Sample

Description: Standard 401(k) census information for retirement plan providers

Payroll Filters

Timeframe (required)

Current Month Current Quarter Process Date

Prior Month Prior Quarter

Current Year to Date Quarter 1

Prior Year to Date Quarter 2

Quarter 3

Quarter 4

Company Set or Company Group Filters

Company: _____ Company Group: _____

Employee Filters

Employee Status: _____ Employee Type: _____

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

The screenshot shows the Paylocity Reporting interface. The 'Report Pickup' tab is highlighted with an orange box and a circled '1'. An orange arrow points from this tab to the 'Report List' tab, which is also highlighted with an orange box and a circled '1'. Below the tabs, a table of reports is visible, with the first row highlighted in light blue.

Name	Last Run On	Workspace	Report Type	Favorite
<input type="checkbox"/> TPA 401K Census TPA 401k Census Report	10/12/2023 01:36 pm	HR & Payroll	Standard Template	
<input type="checkbox"/> 401 K Report Summary or detail of 401(k) payroll activity	10/28/2024 02:47 pm	HR & Payroll	Standard Template	
<input type="checkbox"/> 401K Census Export Standard 401(k) census information for retirement plan providers	10/28/2024 02:50 pm	HR & Payroll	Standard Saved	
<input type="checkbox"/> 401K Census Export Standard 401(k) census information for retirement plan providers	03/20/2024 11:59 am	HR & Payroll	Standard Template	
<input type="checkbox"/> Fidelity Advantage 401(k) PEP Onboarding Export Represents personal data required by Fidelity Investments to establish employees for the Fidelity Advantag...	--	HR & Payroll	Dynamic Template	
<input type="checkbox"/> 401K Loan Listing 401(k) loan deduction totals by employee for the selected check date range	--	HR & Payroll	Standard Template	
<input type="checkbox"/> Year To Date Report - PS Detailed summary of earnings, taxes, & deductions	03/15/2024 10:27 am	HR & Payroll	Standard Template	
<input type="checkbox"/> Comprehensive Demographic Rept	--	HR & Payroll	Standard Template	

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

The screenshot shows the Paylocity Reporting interface with the 'Report Pickup' tab selected. A search bar is visible at the top of the report list. Below the search bar, there are buttons for 'Download Zip', 'Delete', and 'Refresh'. A table of reports is displayed, with the first row highlighted in light blue. The 'Download' column for the first row has a 'xlsx' button highlighted with an orange box and an arrow pointing to it.

Report Name (Co ID)	Generated By	Generated On	Expires On	Download	Delete
<input type="checkbox"/> _ExportCensus				xlsx	

12

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

