Guide for Generating Paycom Data Reports

Introduction

This guide is designed exclusively for clients utilizing Paycom as their payroll provider. It aims to facilitate the process of generating specific data reports required by Pension Services Inc. Following this guide will ensure that you can efficiently and accurately obtain the necessary payroll data.

Report Details

Each report within Paycom serves a unique purpose, tailored to meet the specific needs of Pension Services Inc. Understanding the significance of each report will help in comprehensively meeting compliance and reporting requirements.

Generating Reports: Step-by-Step Instructions

Below are the detailed steps for generating each required report through the Paycom system. Following these instructions carefully will ensure accurate and timely report generation.

Example Report Needed to Complete Your Annual Review.

- 1) Wages and Tax Report
- 2) Census Report
- 3) Labor Allocation Detail Report

Report 1 - Wages and Tax

a. Locate The Report

earch Reports Type report name Q				
Report Writers	Accrual Report ⑦	PDF Excel CSV		
New Hire Reports	Arrears Payment Plan Report ⑦	PDF Excel		
HR Reports	CARES Act Employee Retention Credit Report 🔞	PDF Excel CSV		
Audit Reports	COVID-19 Rate of Pay Converter ⑦			
Payroll Reports	Deduction Accumulator Report (2)	PDF Excel		
Payroll Grid Reports	Deferred Tax Report ⑦	Excel CSV		
Accrual Reports	Emergency Paid Sick Leave Report ②	Excel CSV		
Affordable Care Act Reports	Employee Processing Schedule Report ⑦	PDF Excel HTML CSV		
Applicant Tracking Reports	Employee SSC Tax Deferral Report ⑦	PDF Excel CSV		
Ask Here Reports	Employee YTD Balances Report 💿	PDF Excel HTML CSV		
Benefits Administration Reports	FFCRA Paid Sick and Family Leave Credit Report 💿	PDF Excel CSV		
Certification Management Reports	Garnishment Report 💿	PDF Excel CSV		
	Labor Allocation Detail Report ③	PDF Excel		
Client Inbox Reports	Labor Allocation Summary Report @	PDF Excel		
Compensation Management Reports	PPP Loan Forgiveness Report 💿	PDF Excel		
Documents and	Sick Leave Pay Rate Report ⑦	Excel HTML CSV		
Checklists Reports	Wages and Tax Report 📎			
Expense Management Reports	Workers Compensation Report ③	PDF Excel CSV		
Paycom Learning Reports				
Performance Discussion Form Reports				
Performance Management Reports				
Personnel Action Form Reports				
Position Management Reports				

(Report 1 parameters instructions - continues on next page)

b. Set report parameters and generate

(Select Year 2023 – Qtr 4 and the W2/W3 under Report Version)

Home / Report Center / Wages and	Tax Re	port	
Wages and Tax Report			
Generate Report		Report Queue	Rece
Report-Specific Options	^	1 Selec	t the p
Output Format			
		2 If app	licabl
		3 Selec	t any
Date Range Year 2023 V Qtr 4 V			
			port o oyees.
Report Version		If and	licabl
			by tha
Employee Filters	\sim	(i) Note:	You ca
Custom Field Filters	\sim		
Labor Allocation	\sim		
Sorting	^		
Sort By			
✓ Ascending ✓			
Add Sort Option			
Generate Report			

(Report 1 – End)

Report 2 – Labor Allocation Detail Report.

Home / Report Ce	nter				
earch Reports Type rep					
Report Writers	Accrual Report ⑦	PDF Excel CS			
New Hire Reports	Arrears Payment Plan Report ⑦	PDF Excel			
HR Reports	CARES Act Employee Retention Credit Report 💿	PDF Excel CS			
Audit Reports	COVID-19 Rate of Pay Converter ⑦				
Payroll Reports	Deduction Accumulator Report ⑦	PDF Excel			
ayroll Grid Reports	Deferred Tax Report ⑦	Excel CSV			
Accrual Reports	Emergency Paid Sick Leave Report ⑦	Excel CSV			
Affordable Care Act Reports	Employee Processing Schedule Report @	PDF Excel HT CSV			
Applicant Tracking Reports	Employee SSC Tax Deferral Report 💿	PDF Excel CS			
Ask Here Reports	Employee YTD Balances Report 💿	PDF Excel HT			
Benefits Administration Reports	FFCRA Paid Sick and Family Leave Credit Report ⑦	CSV PDF Excel CS			
Cortification	Garnishment Report @	PDF Excel CS			

a. Locate The Report

Certification Management Reports

Client Inbox Reports

Compensation Management Reports

Documents and Checklists Reports

Expense Management Reports

Paycom Learning Reports Performance

(Report 2 parameters instructions - continues on next page)

Labor Allocation Detail Report 💿

PPP Loan Forgiveness Report @

Sick Leave Pay Rate Report 💿

Workers Compensation Report @

Wages and Tax Report ⑦

Labor Allocation Summary Report @

PDF Excel

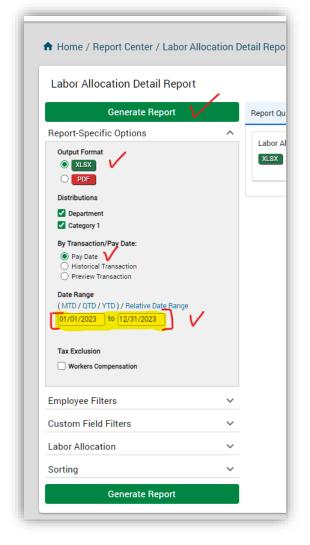
PDF Excel

Excel HTML CSV

PDF Excel CSV

PDF Excel CSV

b. Set report parameters and generate



(DATE RANGE 01/01/2023 thru 12/31/2023)

(Report 2 – End)

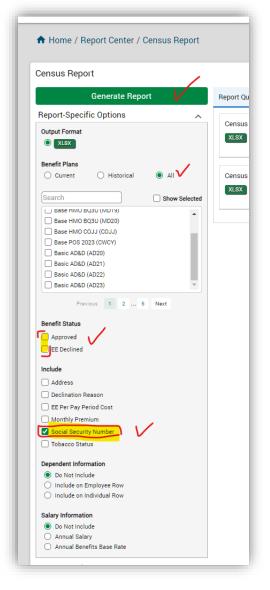
Report 3 – Labor Allocation Detail Report.

A Home / Report Center				
Search Reports Type rep	port name Q			
Report Writers	Beneficiary Audit Report 💿	PDF Excel HTM		
New Hire Reports	Beneficiary Benefits Report 💿	PDF Excel HTM		
HR Reports	Benefit Comparison Report 💿	PDF Excel HTM		
Audit Reports	Benefit Confirmation Report 💿	PDF HTML		
Payroll Reports	Benefit Eligibility Report 💿	PDF Excel HTM		
Payroll Grid Reports	Benefit Enrollment Status Report 💿	PDF Excel HTM		
Accrual Reports	Benefit Plan Audit Report 💿	PDF Excel HTM		
Affordable Care Act Reports	Benefit Plan Summary Report 💿	PDF Excel HTM		
Applicant Tracking	Benefit Validation Report 💿	PDF HTML		
Reports	Benefits Eligibility Profile Audit Report 💿	PDF Excel HTM		
Ask Here Reports	Benefits Eligibility Profile Report 💿	PDF Excel HTM		
Benefits Administration V Reports	Census Report 📎	Excel		
Certification Management Reports	Dependent and Beneficiary Information Report ③	PDF Excel HTM		
	Dependent Audit Report ②	PDF Excel HTM		

a. Locate The Report

(Report 3 parameters instructions - continues on next page)

b. Set report parameters and generate



(SELECT ALL, and INCLUDE SSN OPTION)

(Report 3 - End)

Summary

This guide provides a comprehensive overview of the steps required to generate specific payroll reports via Paycom. For further assistance or inquiries, please contact Pension Services Inc. support.

Frequently Asked Questions (FAQ)

This section addresses some common questions and challenges you might encounter while generating reports. Please review this FAQ to troubleshoot common issues or contact support for more complex queries.

Contact Information

For additional support, please contact us at: Email: <u>it@pensionnetwork.net</u> Phone: 305-595-5500 ext 206

Ignacio Villalobos