

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

Home / Report Center

Search Reports

Report Writers	Accrual Report ⓘ	PDF Excel CSV
New Hire Reports	Arrears Payment Plan Report ⓘ	PDF Excel
HR Reports	CARES Act Employee Retention Credit Report ⓘ	PDF Excel CSV
Audit Reports	COVID-19 Rate of Pay Converter ⓘ	
Payroll Reports	Deduction Accumulator Report ⓘ	PDF Excel
Payroll Grid Reports	Deferred Tax Report ⓘ	Excel CSV
Accrual Reports	Emergency Paid Sick Leave Report ⓘ	Excel CSV
Affordable Care Act Reports	Employee Processing Schedule Report ⓘ	PDF Excel HTML CSV
Applicant Tracking Reports	Employee SSC Tax Deferral Report ⓘ	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
Client Inbox Reports	Labor Allocation Detail Report ⓘ	PDF Excel
Compensation Management Reports	Labor Allocation Summary Report ⓘ	PDF Excel
Documents and Checklists Reports	PPP Loan Forgiveness Report ⓘ	PDF Excel
Expense Management Reports	Sick Leave Pay Rate Report ⓘ	Excel HTML CSV
Paycom Learning Reports	Wages and Tax Report ⓘ	PDF Excel CSV
Performance Discussion Form Reports	Workers Compensation Report ⓘ	PDF Excel CSV
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 Report

Wages and Tax Report

Generate Report Report Queue Recent Reports

Report-Specific Options

Output Format

CSV

XLSX

PDF

Date Range

Year 2023 Qtr 4

Report Version

W2/W3

Employee Filters

Custom Field Filters

Labor Allocation

Sorting

Sort By

Ascending

Add Sort Option

Generate Report

- 1 Select the preference
- 2 If applicable, select
- 3 Select any applicable
- 4 To report on a specific set of employees.
- 5 If applicable, exclude filter by that field

Note: You can utilize

(Report 1 – End)

Report 2 – Labor Allocation Detail Report.

a. Locate The Report

Home / Report Center

Search Reports 🔍

Report Writers	Accrual Report ⓘ	PDF Excel CSV
New Hire Reports	Arrears Payment Plan Report ⓘ	PDF Excel
HR Reports	CARES Act Employee Retention Credit Report ⓘ	PDF Excel CSV
Audit Reports	COVID-19 Rate of Pay Converter ⓘ	
Payroll Reports	Deduction Accumulator Report ⓘ	PDF Excel
Payroll Grid Reports	Deferred Tax Report ⓘ	Excel CSV
Accrual Reports	Emergency Paid Sick Leave Report ⓘ	Excel CSV
Affordable Care Act Reports	Employee Processing Schedule Report ⓘ	PDF Excel HTML CSV
Applicant Tracking Reports	Employee SSC Tax Deferral Report ⓘ	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
Client Inbox Reports	Labor Allocation Detail Report ⓘ	PDF Excel
Compensation Management Reports	Labor Allocation Summary Report ⓘ	PDF Excel
Documents and Checklists Reports	PPP Loan Forgiveness Report ⓘ	PDF Excel
Expense Management Reports	Sick Leave Pay Rate Report ⓘ	Excel HTML CSV
Paycom Learning Reports	Wages and Tax Report ⓘ	PDF Excel CSV
Performance	Workers Compensation Report ⓘ	PDF Excel CSV

(Report 2 parameters instructions - continues on next page)

- b. Set report parameters and generate
(DATE RANGE 01/01/2023 thru 12/31/2023)

Home / Report Center / Labor Allocation Detail Repo

Labor Allocation Detail Report

Generate Report ✓

Report-Specific Options ^

Output Format ✓

XLSX ✓
 PDF

Distributions

Department
 Category 1

By Transaction/Pay Date:

Pay Date ✓
 Historical Transaction
 Preview Transaction

Date Range
(MTD / QTD / YTD) / Relative Date Range

01/01/2023 to 12/31/2023 ✓

Tax Exclusion

Workers Compensation

Employee Filters ▾

Custom Field Filters ▾

Labor Allocation ▾

Sorting ▾

Generate Report

(Report 2 – End)

Report 3 – Labor Allocation Detail Report.

a. Locate The Report

The screenshot shows a web application interface titled "Home / Report Center". It features a search bar labeled "Search Reports" with a placeholder "Type report name" and a search icon. Below the search bar is a table listing various reports. The table has three columns: a category on the left, the report name in the middle, and available export formats on the right. The "Benefits Administration Reports" category is highlighted with a blue bar and a red checkmark. The "Census Report" is highlighted with a yellow background, and its "Excel" export option is circled in red.

Category	Report Name	Export Options
Report Writers	Beneficiary Audit Report ⓘ	PDF Excel HTML
New Hire Reports	Beneficiary Benefits Report ⓘ	PDF Excel HTML
HR Reports	Benefit Comparison Report ⓘ	PDF Excel HTML
Audit Reports	Benefit Confirmation Report ⓘ	PDF HTML
Payroll Reports	Benefit Eligibility Report ⓘ	PDF Excel HTML
Payroll Grid Reports	Benefit Enrollment Status Report ⓘ	PDF Excel HTML
Accrual Reports	Benefit Plan Audit Report ⓘ	PDF Excel HTML
Affordable Care Act Reports	Benefit Plan Summary Report ⓘ	PDF Excel HTML
Applicant Tracking Reports	Benefit Validation Report ⓘ	PDF HTML
Ask Here Reports	Benefits Eligibility Profile Audit Report ⓘ	PDF Excel HTML
Benefits Administration Reports ✓	Census Report ⓘ	Excel
Certification Management Reports	Dependent and Beneficiary Information Report ⓘ	PDF Excel HTML
	Dependent Audit Report ⓘ	PDF Excel HTML

(Report 3 parameters instructions - continues on next page)

- b. Set report parameters and generate
(SELECT ALL, and INCLUDE SSN OPTION)

Home / Report Center / Census Report

Census Report

Generate Report ✓

Report-Specific Options

Output Format
 XLSX

Benefit Plans
 Current Historical All ✓

Search Show Selected

- Base HMO BQ3U (MU19)
- Base HMO BQ3U (MD20)
- Base HMO COJU (COJU)
- Base POS 2023 (CWCY)
- Basic AD&D (AD20)
- Basic AD&D (AD21)
- Basic AD&D (AD22)
- Basic AD&D (AD23)

Previous 1 2 ... 6 Next

Benefit Status
 Approved ✓
 EE Declined

Include
 Address
 Declination Reason
 EE Per Pay Period Cost
 Monthly Premium
 Social Security Number ✓
 Tobacco Status

Dependent Information
 Do Not Include
 Include on Employee Row
 Include on Individual Row

Salary Information
 Do Not Include
 Annual Salary
 Annual Benefits Base Rate

Report Qu
Census XLSX
Census XLSX

(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: it@pensionnetwork.net

Phone: 305-595-5500 ext 206

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