

Paychex Additional Report

How to Download the Retirement Plan Data Report



If you have access to **Custom Analytics**, you can download the **Retirement Plan Data Report** by following the steps below. If you do not have access to this report, skip these steps and proceed to the next report, the **Diversity and Equal Pay Report**.

1

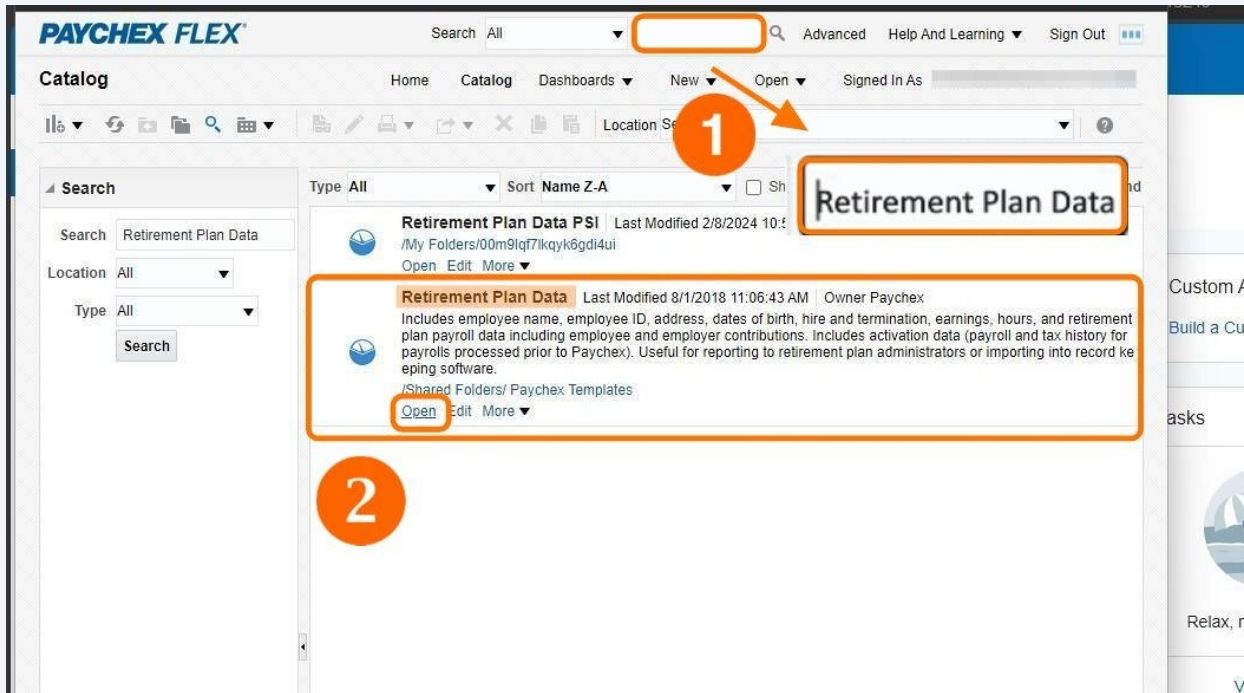
On the **Dashboard** page of the Paychex Flex website, select **Custom Analytics** from the available options.

The screenshot shows the Paychex Flex Dashboard interface. On the left sidebar, the 'Dashboard' link is highlighted with an orange circle and a '1' callout. In the main dashboard area, the 'Custom Analytics' button is highlighted with an orange circle and a '2' callout. Below this, there is a 'Demographics' section with a bar chart titled 'Generation' showing counts for Generation X (51), Baby Boomers (10), and Unassigned (21). Other sections include 'Tasks' with a 'Relax, no new tasks' message and 'People' with 'Add Employee' and 'View People List' buttons.

| Generation | Count |
|--------------|-------|
| Generation X | 51 |
| Baby Boomers | 10 |
| Unassigned | 21 |

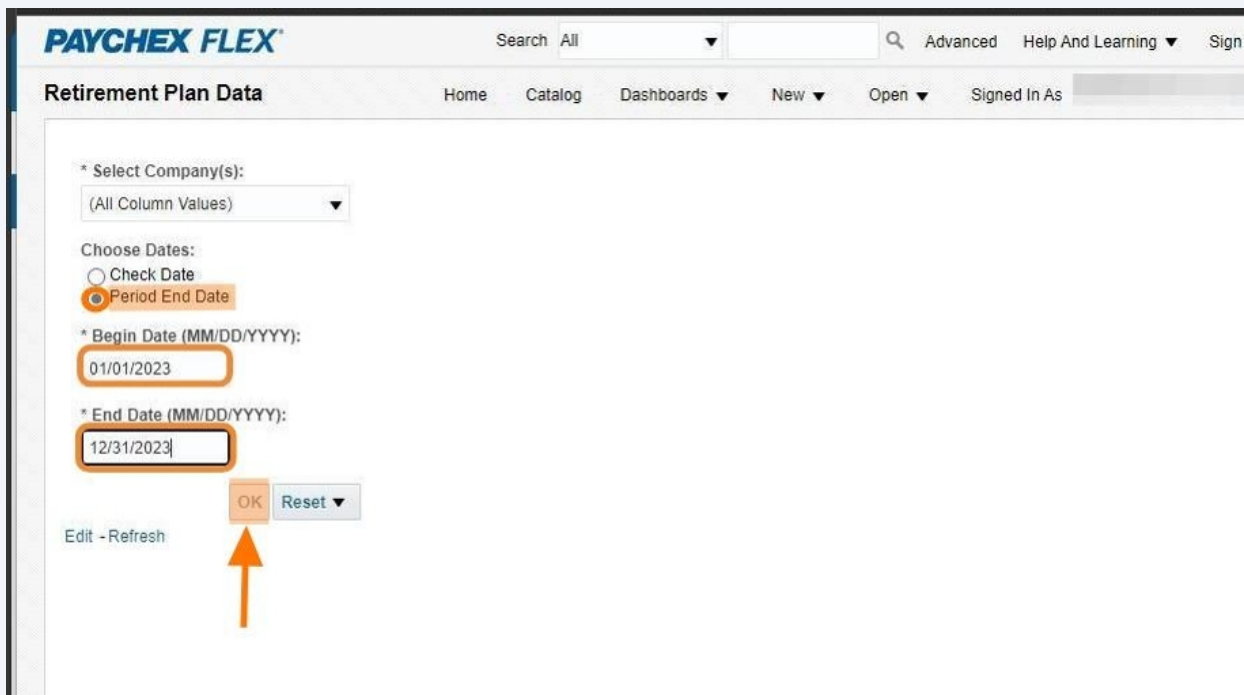
2

Once the new window is open, locate the search bar at the top of the page and type **Retirement Plan Data**. Find the report in the search results and click **Open** to access it.

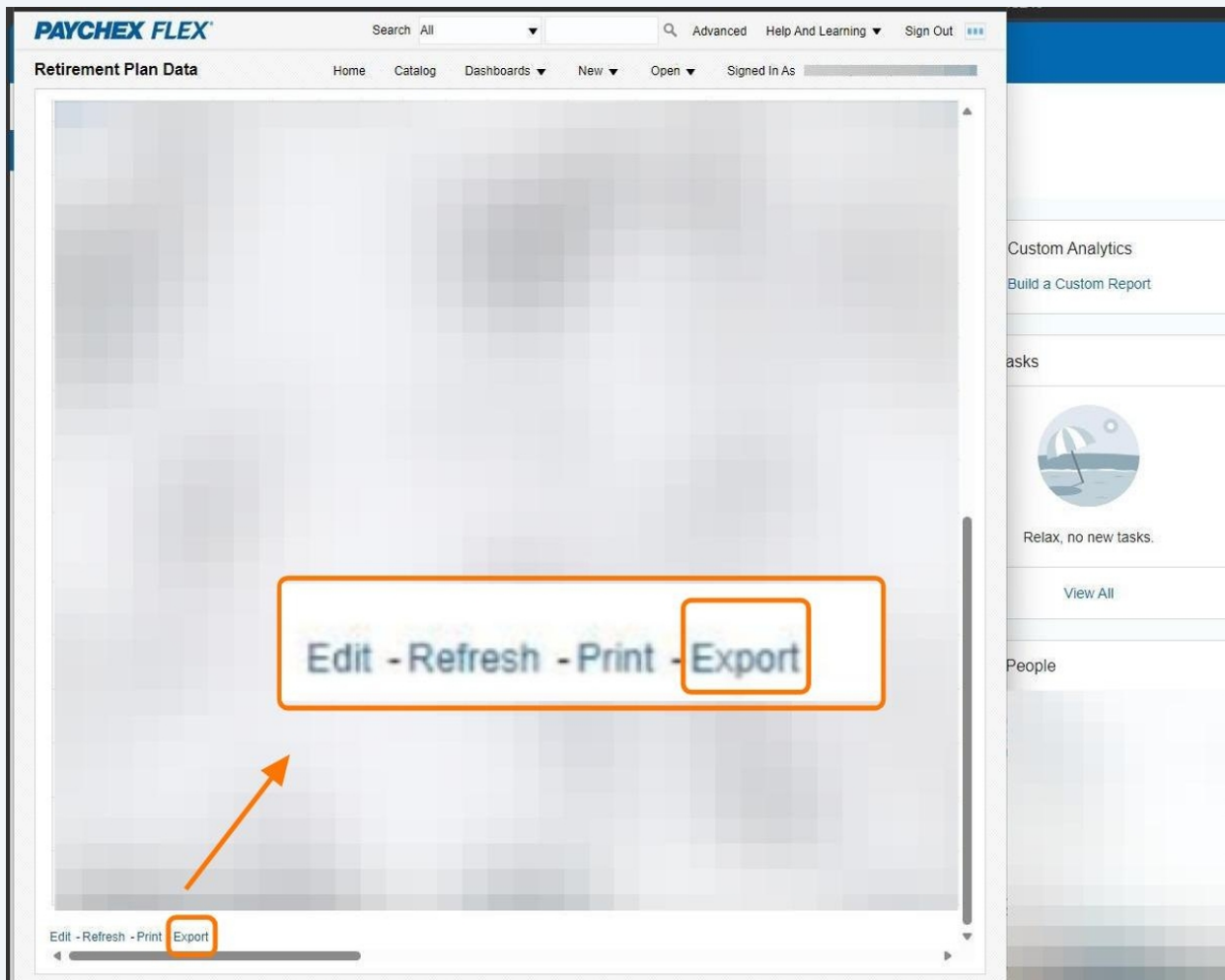


3

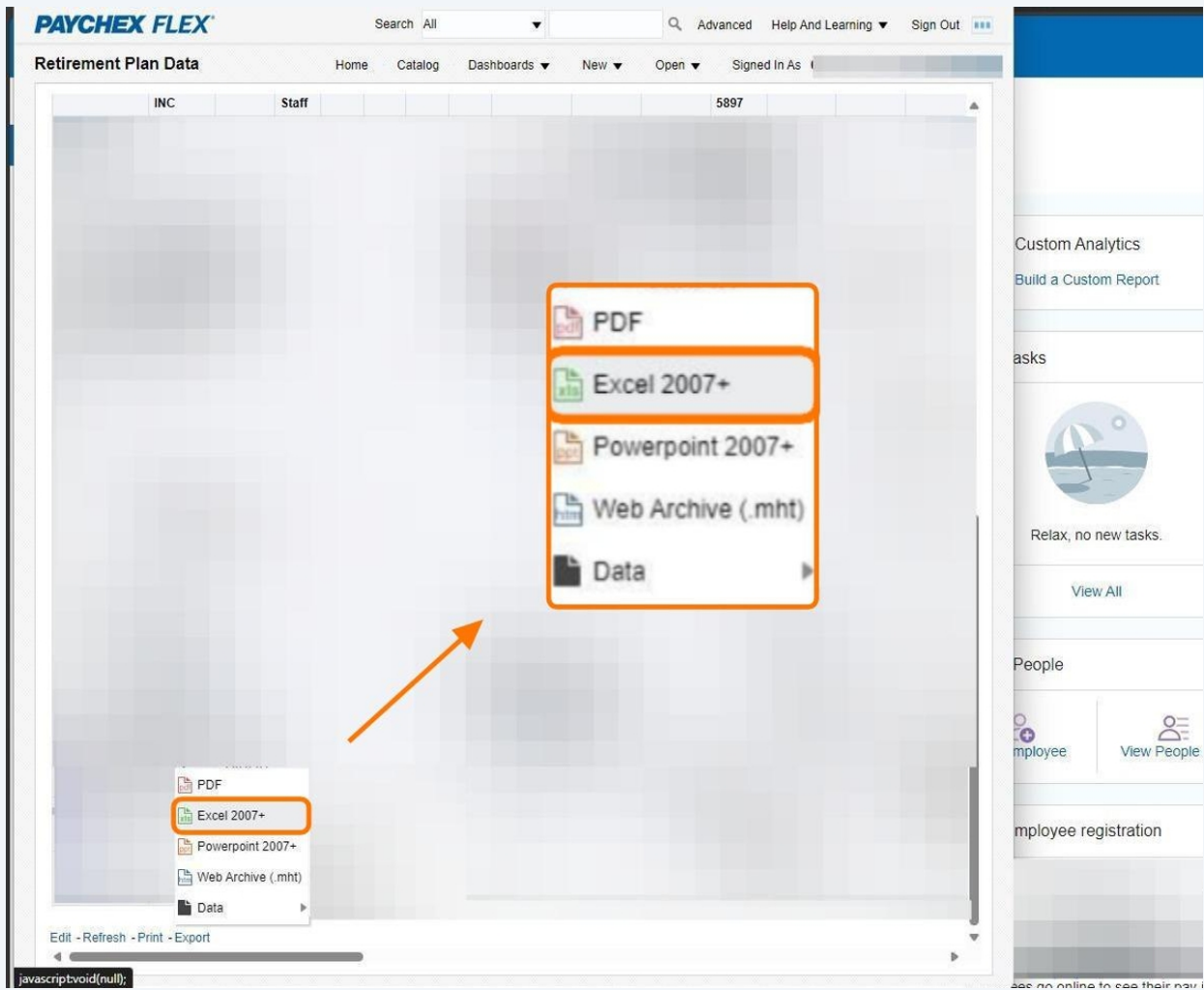
In the section **Choose Dates**, select **Period End Date**. In the **Begin Date** section, enter the start of the date range and in the **End Date** section, enter the end of the date range. Refer to the census request to ensure you use the correct year for both fields. Then click **OK** to proceed



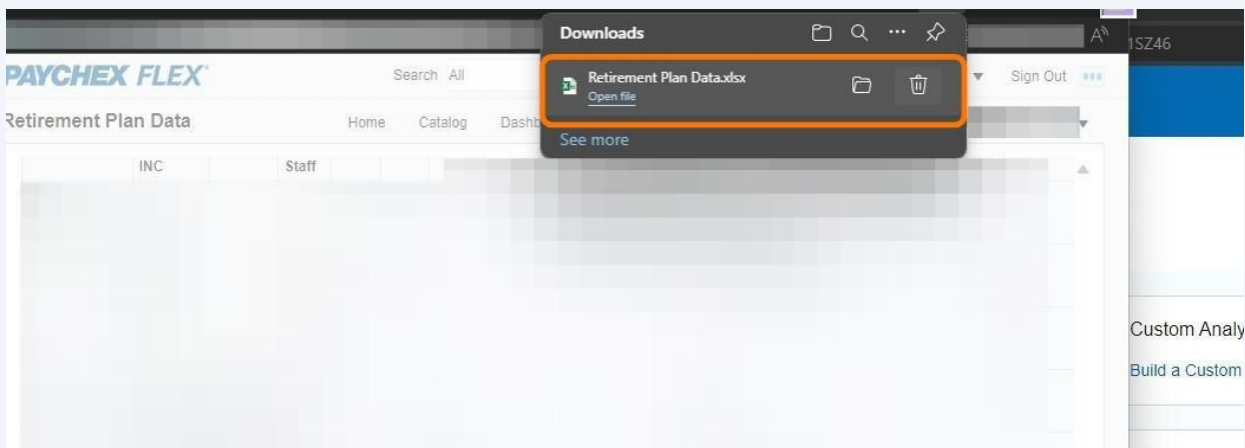
6 Once the report is open, go to the bottom left corner. Click on **Export**



7 A dropdown menu will appear and then select **Excel 2007+**



8 The file will be saved automatically to your **Downloads** folder



How to Download Diversity and Equal Pay Report

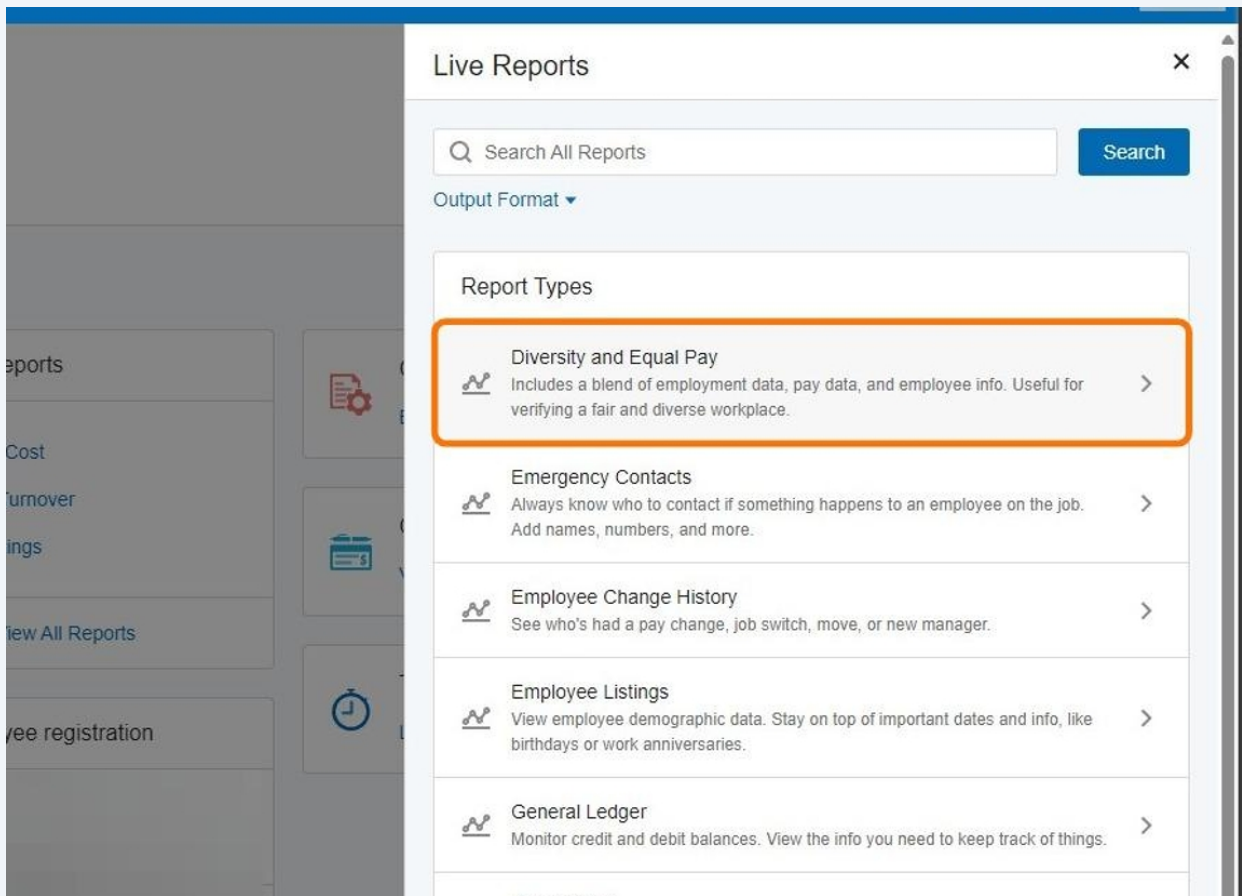
9

On the **Analytics & Reports** page, In the Menu Live Reports Select on **View all Report**

The screenshot displays the 'Analytics & Reports' interface. On the left is a navigation menu with items like 'Dashboard', 'Analytics & Reports', 'Payroll Center', 'Company Directory', 'Human Resources', 'Hiring', 'Company Details', 'General Ledger', and 'OTHER' (including 'Company Settings', 'Help Center', and 'HR Library'). The main content area is titled 'Analytics & Reports' and has a sub-tab 'Overview' selected. Below this, there are several report categories: 'Quick Reports' (with sub-items: Sets, Favorites, Last Payroll, View All Reports), 'Live Reports' (with sub-items: Payroll Labor Cost, New Hires & Turnover, Employee Listings, View All Reports), 'Employee registration' (with a table showing 'Employee accounts 21/151' and 'Registered 13%'), 'Custom Analytics' (with 'Build a New Report'), 'Check Stubs' (with 'View checks'), and 'Time & Attendance' (with 'Learn more'). An orange box highlights the 'Live Reports' section, and an arrow points to the 'View All Reports' button within it. The footer contains 'Security | Privacy' and 'Copyright © 2024 by Paychex, Inc.'

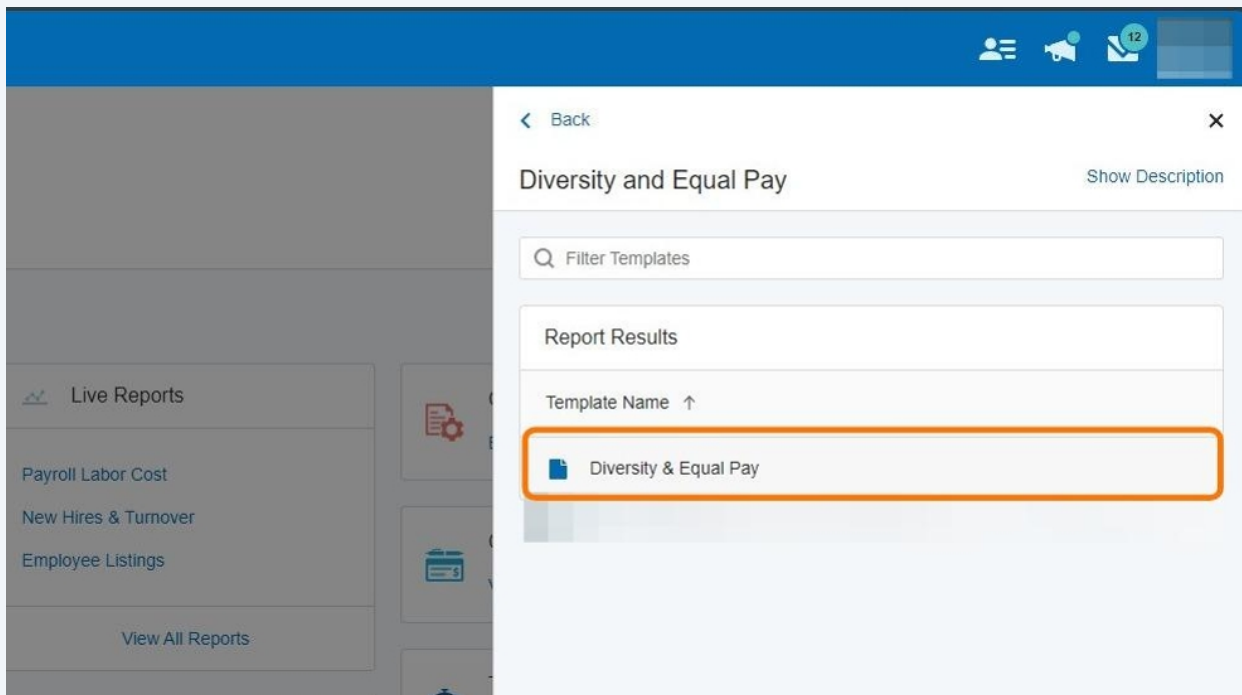
10

Once the **Live Reports** menu is open, select **Diversity and Equal Pay**.



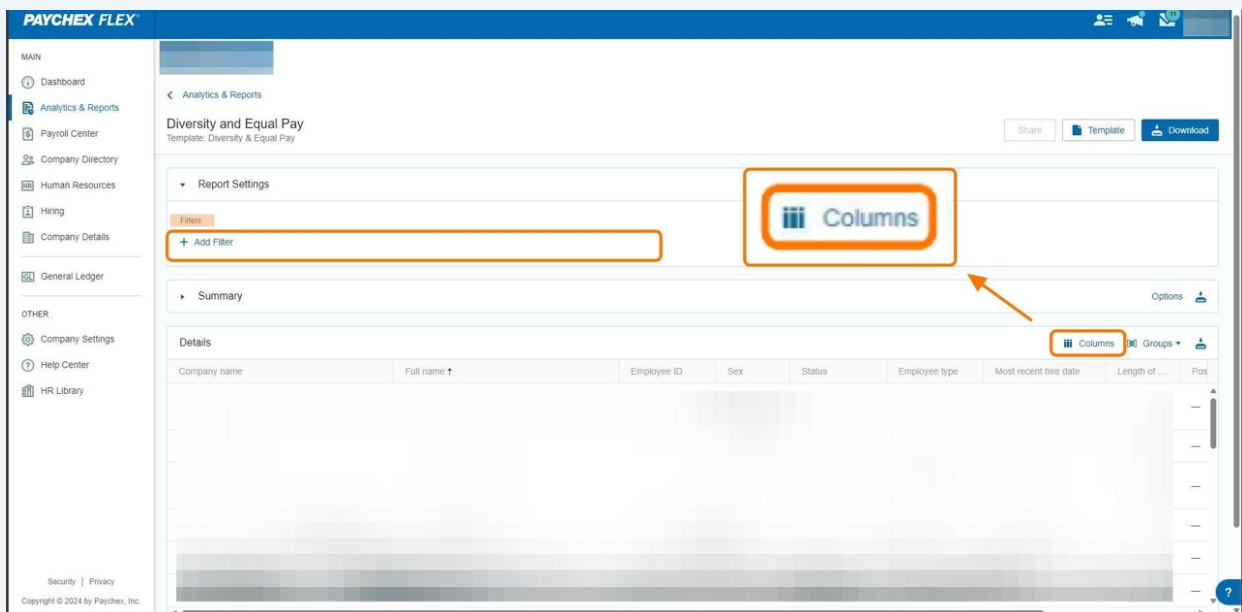
11

After opening the **Diversity and Equal Pay** menu, select the **Diversity & Equal Pay** option to proceed.

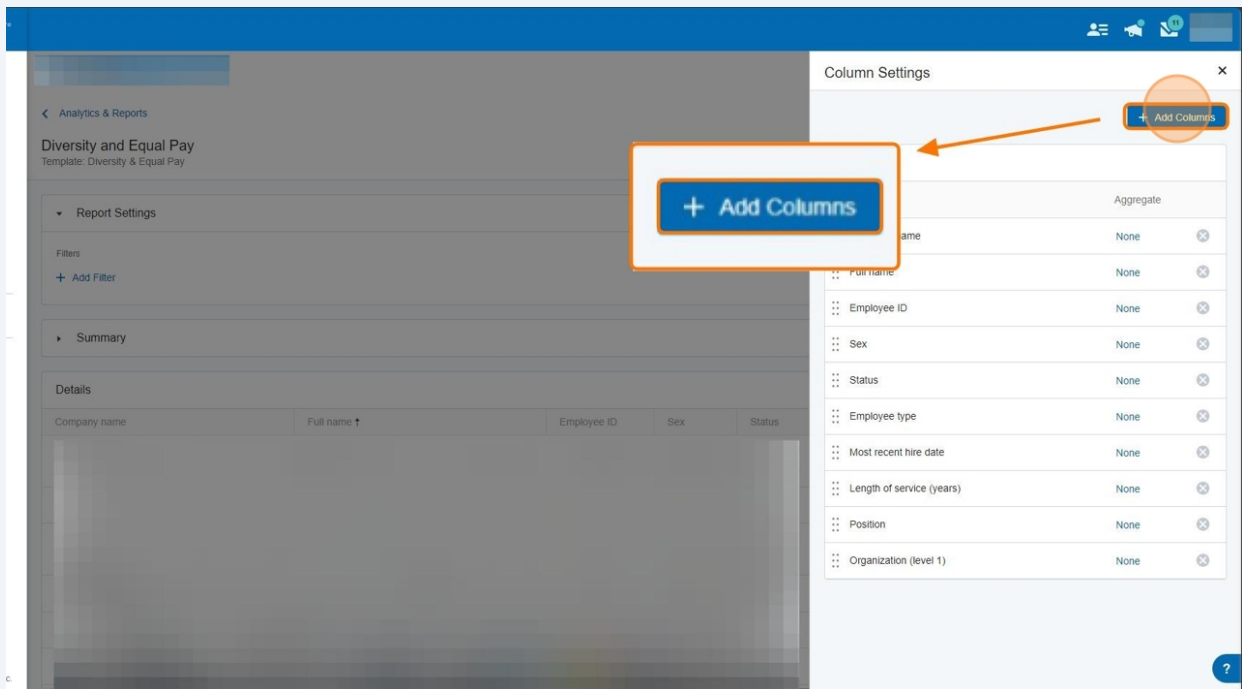


12

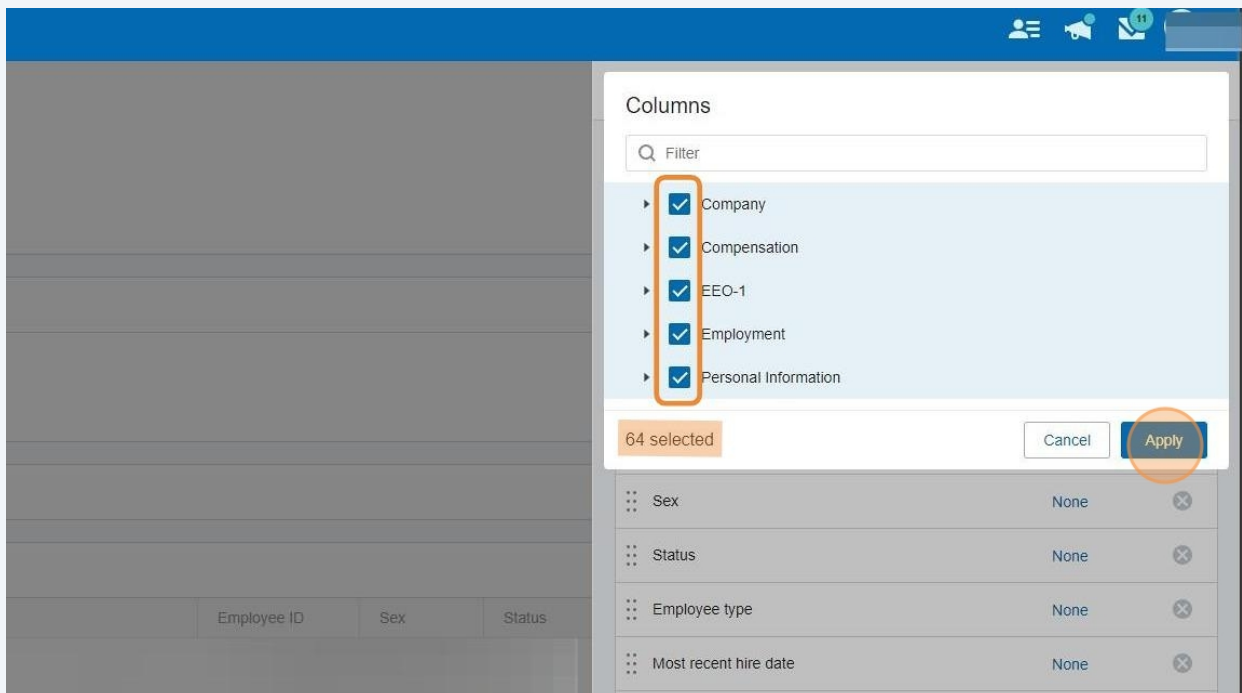
When the **Diversity and Equal Pay** report is open, ensure that no filters are applied. Then, click on **Columns**.



13 In **Column Settings**, select **Add Columns**.



14 In the **Add Columns** section, ensure that you select all the relevant categories and their subcategories. A total of **64** columns should be selected. Once done, click **Apply**.



15 Close the Column Settings

Column Settings

+ Add Columns

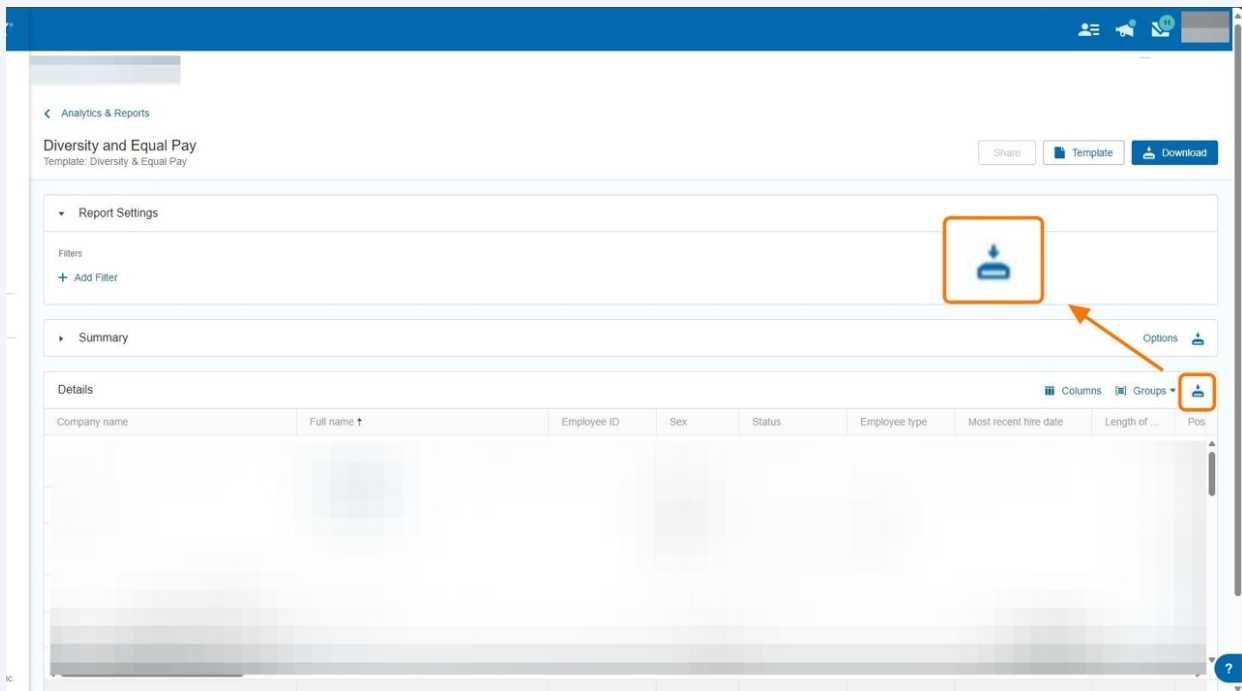
64 Columns

| Column | Aggregate |
|-----------------------------------|-----------|
| Company name | None |
| Full name | None |
| Employee ID | None |
| Sex | None |
| Status | None |
| Employee type | None |
| Most recent hire date | None |
| Length of service (years) | None |
| Position | None |
| Organization (level 1) | None |
| Company ID | None |
| Display name (same as Federal ID) | None |
| Annual wage | None |

Employee ID Sex Status

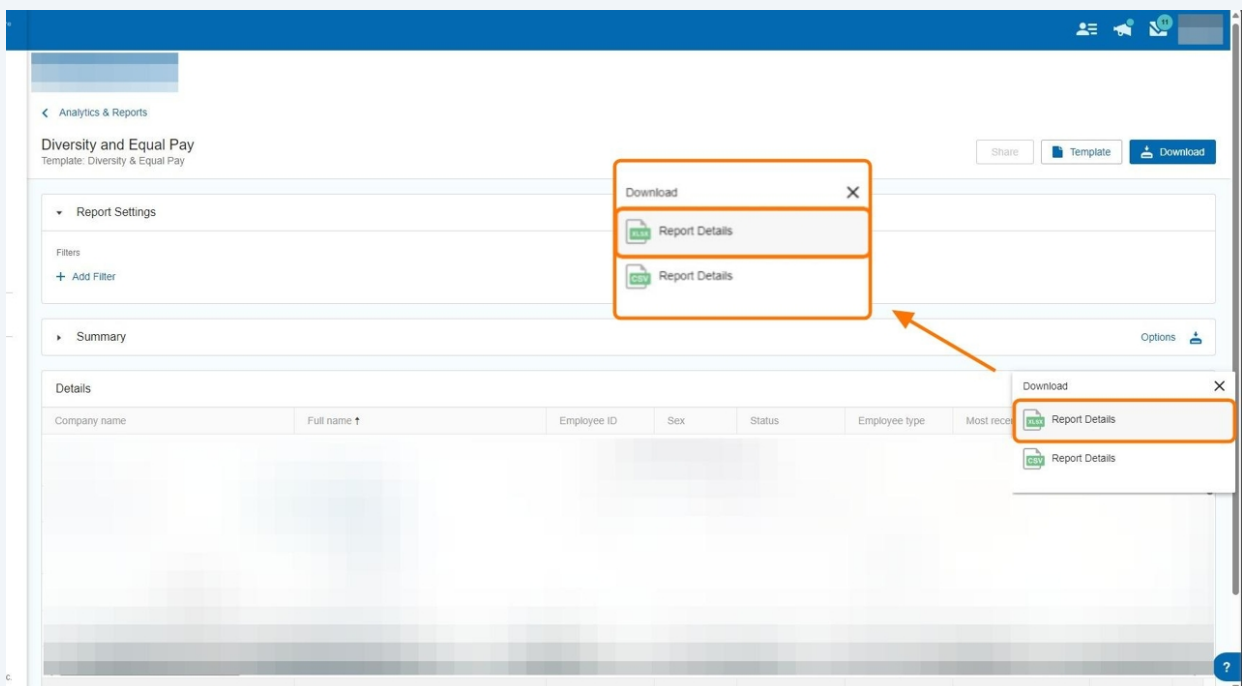
16

Once back in the **Diversity and Equal Pay** report, go to **Details** and then click on the **save icon**



17

Once you click the save icon, scroll-down menu will appear. From the menu, select **Report Details Excel (XLSX)** to save the report.



18 The report will be saved automatically to your **Downloads** folder

