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How to pull a Payroll/Census Report via ADP, PAYCHEX, Paylocity and Quickbooks

MUST ALWAYS BE EXPORTED TO EXCEL

Details needed for initial Evaluation:

- First and Last Name (use unique #'s or just last name if you prefer)
- State
- Date of Birth
- Annual GROSS Income (estimate for employees that are under a year and hourly employees)
- marital status
- W4 Dependents

ADP Census/Payroll Report

This information may vary slightly depending on your version

Building a Custom Report

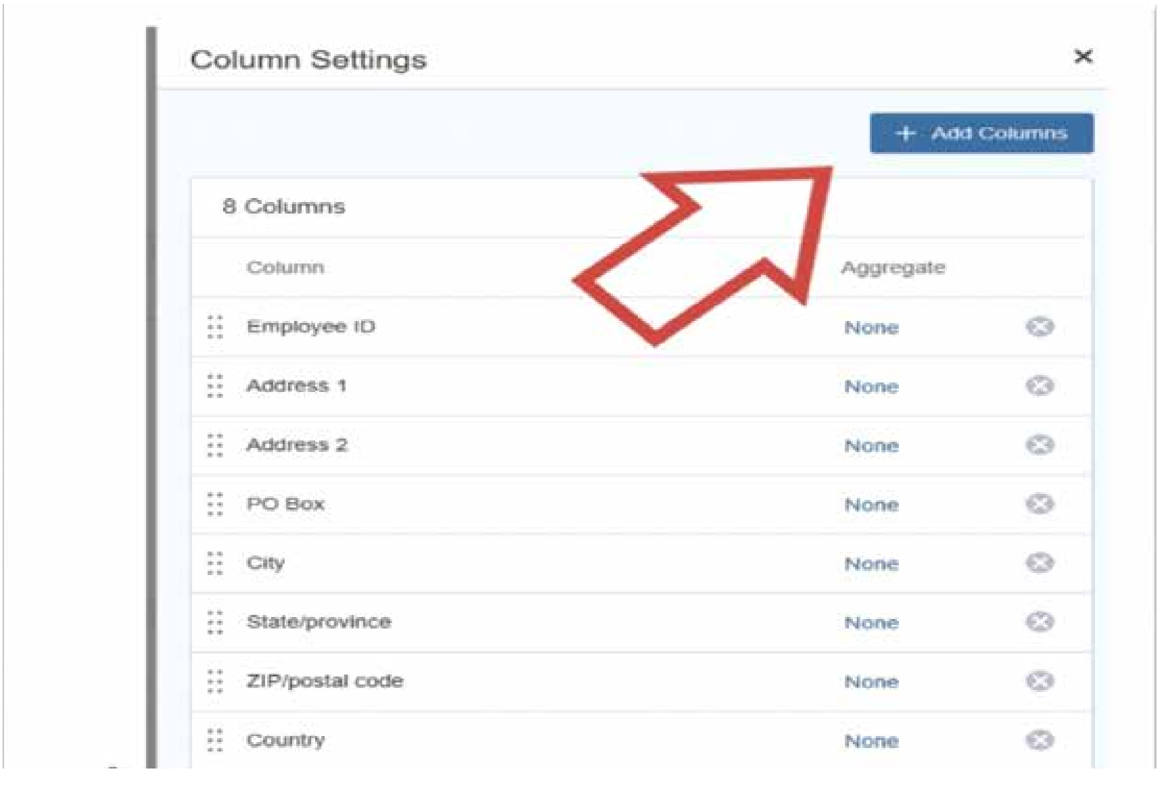
1. Go to **RUN > Reports > Build custom reports.**
2. On the **What would you like to do?** page, select one of the categories:
   - **Employee and contractor**
   - **Payroll**
   - **Deductions**
   - **Paid Time Off**
3. On the **Build Your Report – Step 1** page, type your **Report title** and **Report description**.
4. In the **Step 2** section, drag and drop the fields to include on the report from the list of fields in the left panel.
5. To preview the report, click **RUN Report** and select **View Online** (or one of the other output formats).
6. Make any needed changes to the report (add / delete fields, change the order of the columns).
7. If needed, click **Filter Your Report.**
   - In the left column, click to select one or more fields to filter.
   - Click **Add Filter Conditions.**
   - On the panel that slides in, enter the conditions for the fields selected. Click **Apply Changes.**
8. If needed, click **RUN Report** to preview or run the report again.
9. To save the report to use again, click **Save Report.**

PAYCHEX Census/ Payroll Report

This information may vary slightly depending on your version.

Please export as excel

1. Log into Paychex Flex Dashboard
2. Click “Live Reports” from analytics & Reports Section
3. Click “Employee Listings”
4. Click Employee Address”
5. You will see date criteria as well as filtering options - the default is to only provide info for employees that are NOT terminated (active employees only). You will see a summary section which can be ignored.
6. Scroll down to “Details” section. You will see your employees basic info displayed.
7. Click on the “Columns” button to customize and add fields into this dashboard. Click “X” next to fields you would like to remove (i.e. country, company name etc.).
8. Click “+ Add Columns” to add fields into the report. Click the six grey vertical dots to drag and reorder.
9. **Please export as excel.**



<u>Paylocity Census/Payroll Report</u>

This information may vary slightly depending on your version

1. Select Report Class
2. Click Next
3. Select Employee Info (left hand side)

- First Name
- Last Name
- Address
- City
- State
- Zip
- Phone
- Gender
- DOB
- Email
- Annual Income (if an employee hasn't been there for a year or is hourly, please estimate their annual salary)
- Under demographics select Marital Status
- Under Insurance Plans add Dependent Eligibility Coverage

You can use the search field at the top if you are unable to locate any of these fields

- Click Next
- Click Employee Status and then select Active to only show active employees
- Click Next

Select Save and Run in the top right-hand corner

Click on Report Pickup Library

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<u>QUICKBOOKS Census /Payroll Report</u>

This information may vary slightly depending on your version.

- Click on employees on the top row, and open employees center
- On the left side, select payroll.
- At the bottom of the screen you should see Summarize Payroll Data
- Select Summarize payroll data.
- Select Last Month.
- Click get QuickBooks data and **please export as excel**.
- After you have your excel, you can remove any unnecessary items

PAYCOM Census /Payroll Report

This information may vary slightly depending on your version.

How to Set up and Run the Paycom Payroll Data Report

The Paycom Payroll Data report uses the parent-child schema in the service code label relationship. This requires organizations to follow the data protocols below to run and export the report properly.

To set up the Paycom Payroll Data report:

1. Navigate to the Insights module and select Staff Management
2. Click the Paycom Payroll Data Report
3. Users need to designate parent service codes with the exact parent label name (quotations should be removed from names).
    - "Paycom Earning Codes" as the first parent label name.
    - "Paycom Mileage Code" as the second parent label name.
    - Only appropriate types of labels should be in the organization's parent label parent-child relationship. The report will collect data for any labels under these parent labels.
4. Organizations must avoid using multiple labels from the same designated parent-label type on the same payroll item. If multiple "Paycom Earning Codes" labels are applied to the same payroll item, the item will not aggregate multiple times and the user cannot choose which Earning Code label is used.
    - Please note, users should utilize the exact text of the above parent labels (e.g., no added spaces).

5. Once set up is complete, run payroll for the applicable period.

6. In order for drive time to reflect properly for the current day, organizations need to use a separate drive time service code with the appropriate “Paycom Earning Codes” label.

7. If the “Drive Info” (Hours and Mins) section of the timesheet for drive time is utilized, those drive time hours will not reflect on the report, but will count as part of the overtime calculation.

- Please note:
  - All drive time needs to be captured one time using a drive time service code.
  - Mileage pulls from the “Drive Info” (Miles) section of the timesheet. To reflect mileage on the report, add the appropriate “Paycom Mileage Code” service code child label. The service code can have one child label from both the “Paycom Earning Codes” and “Paycom Mileage Code” groups.

Please export as excel