



CensusPro2 Welcome Guide

Your guide to submitting payroll data to BPAS

CensusPro2



Reduce Administrative Burdens

Thank you for choosing BPAS as your retirement plan provider. One of the essential items to run a plan successfully is employee payroll and census data. Here at BPAS, we use a proprietary, web-based portal for the collection of payroll and census data called CensusPro2. With the help of this guide, you'll learn about the lifecycle of your files and how to upload them.

Work with experts focused on saving you time and headaches.

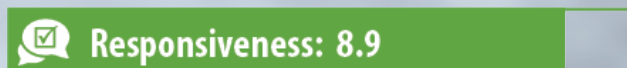
Our Team

Jason Acee spearheads the census team, with over 20 years of experience at BPAS within the Operations Department. He is dedicated to improving systems and processes for the betterment of the client experience. Jason leads the census department team of experts that are ready to assist clients in submitting their employees' payroll deducted plan assets and census data.

For assistance:
Phone: 315-292-6970
Email: Census@BPAS.com

BPAS Census Team

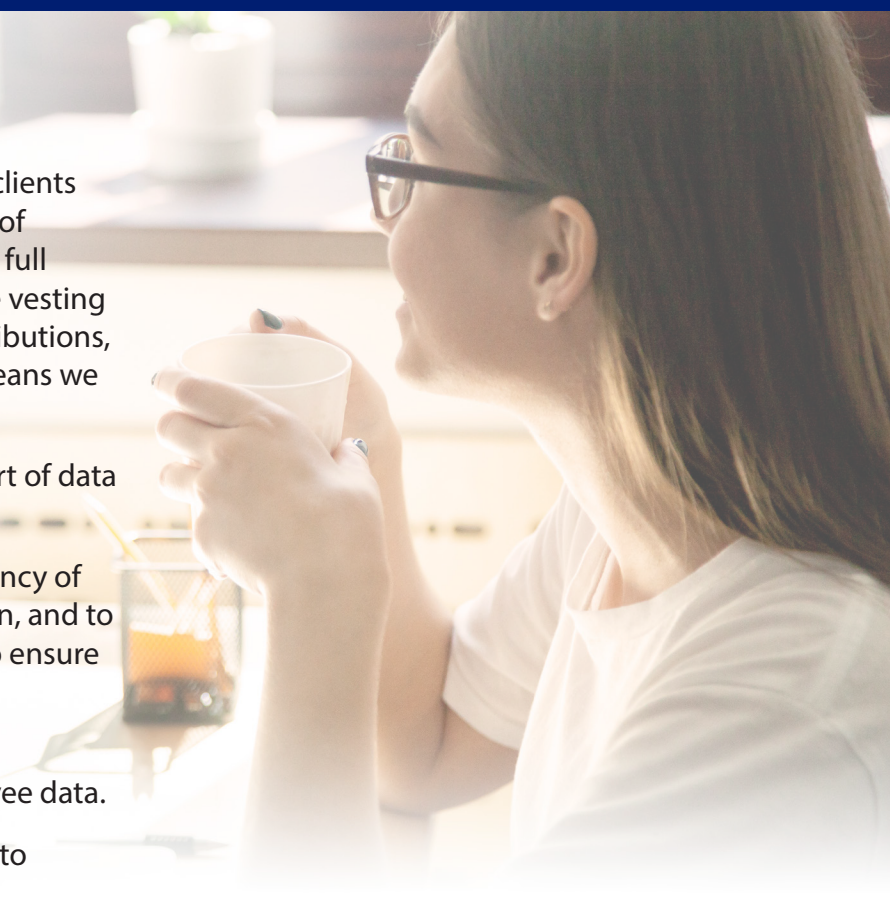
Average rating on a scale of 1 to 10



Beyond Recordkeeping

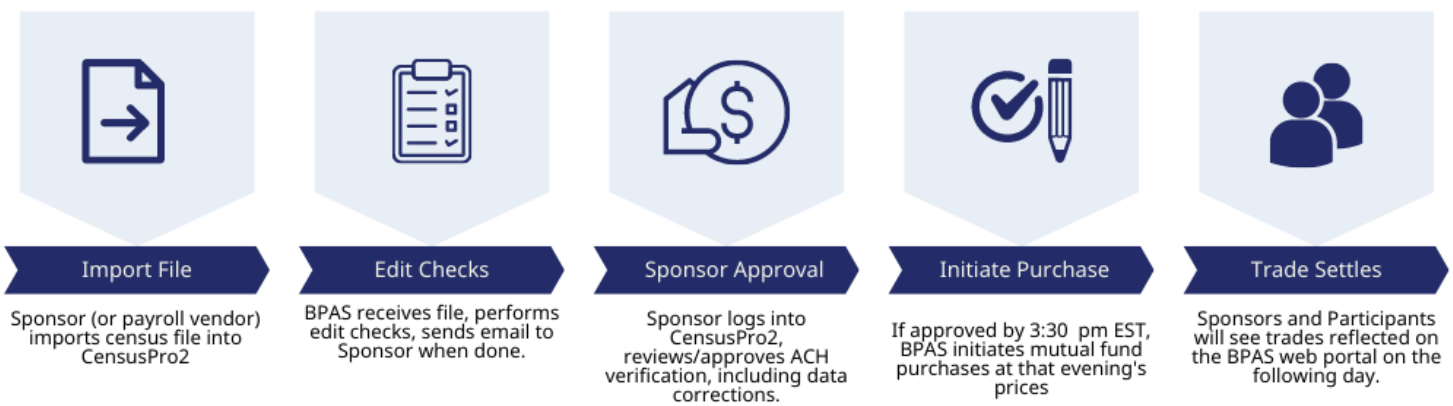
At BPAS, our service to workplace retirement plan clients goes beyond recordkeeping. We provide a full line of value added services like: eligibility determination, full online enrollment, automatic enrollment, real-time vesting updates, adjudication of loans, hardships and distributions, and more. Delivering this robust level of service means we need a bit more data each payroll period.

- Designed to allow manual entry as well as import of data through compatible electronic files.
- Validations are conducted to improve the efficiency of daily plan administration, year-end reconciliation, and to reduce the amount of work done by sponsors to ensure the data submitted is accurate and complete.
- Reports are available to assist client sponsors in monitoring their plan contributions and employee data.
- Divisional reporting and user roles are available to separate employee groups and user security.



Submitting Employee Census & Payroll Files

Current census data allows your plan recordkeeper to connect directly with your participants. With this connection, your recordkeeper can deliver your participants a secure online experience—giving them access to contribution, account management, and advice features—that can help improve their retirement readiness.



Work with experts focused on saving you time and reducing headaches.



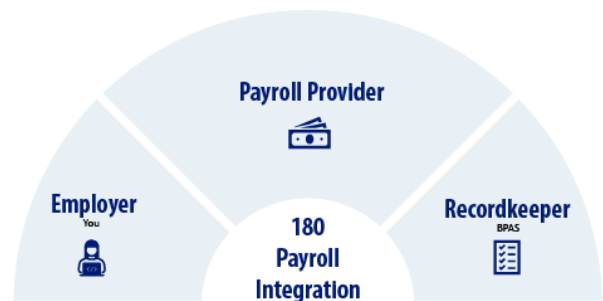
Work with the best in DC plan administration and your choice of payroll providers for highly automated services across the board.

The Census Department has experience working with many payroll companies and in house systems. BPAS has developed many relationships with payroll companies to build automation for passing data back and forth on behalf of our mutual clients.

Choose Your Integration Model

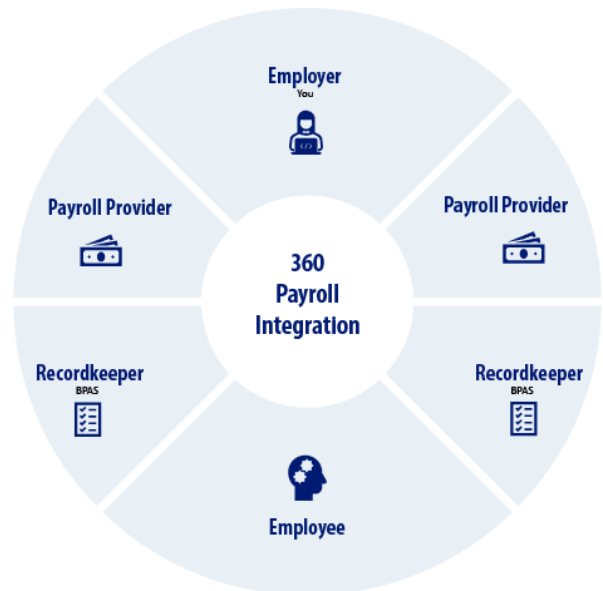
180-Degree Integration

Under this model, BPAS works with the payroll provider to allow the provider to securely submit census files directly to BPAS each pay period, without plan sponsor involvement. The client will receive an email when files are ready to be approved, at which point they will log onto CensusPro2 and approve the file for trading. It's that easy.



360-Degree Integration

This model operates in conjunction with our full online enrollment service and takes the benefits of 180-degree integration a step further. When there are "action items" that impact payroll, BPAS communicates directly with the payroll provider. Action items include new enrollments, contribution rate changes, new loans, hardship distributions and similar activity. BPAS transmits data directly to the payroll provider which saves time for the client. 360-integration is available for payroll providers that have larger books of plans in common with BPAS and have the operational infrastructure to manage the process.



A win-win! When a client has the option to work with BPAS, a specialist at DC plan administration, and a payroll provider of their choosing (under 180- or 360-degree integration), the result is a win-win: The best level of automated service while working with best-in-class providers. We maintain a growing list of payroll providers that support 180- and 360-degree integration. And, many payroll providers are willing to start 180-degree integration at little or no cost. **We'll take care of the details. You enjoy the time you'll save.**



Login to Your CPro2 Account

To log into your CPro2 account, please go to: <https://censuspro.bpas.com/DVW/>.

- For first-time users, BPAS will provide you with your CPro2 username and password; both are case-sensitive.
- Type in username
- Type in your password and click “Log on”

Important: You’ll need to reset your password annually. We’ll send you an email reminder prior to the password expiration date.

Password requirements: 8 characters; at least 1 uppercase letter, 1 lowercase letter, 1 number, and one special character: ' ! " \$ % & # () = ? + * /

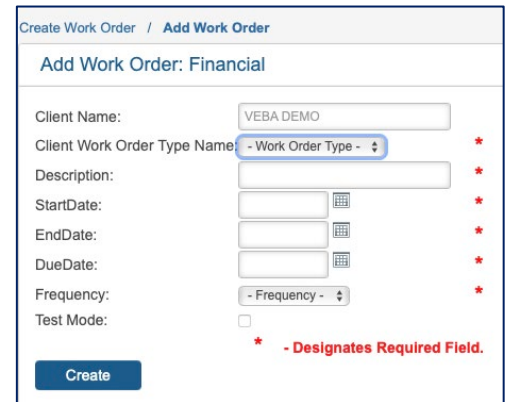


Add Work Order

For regularly scheduled payroll dates, Work Orders are automatically created for you. You may manually add a work order for off-cycle dates, cases where a scheduler is not used, or if you need to start over.

To add a work order, click on the **Payroll** drop-down menu and choose **Create New Financial Payroll**. To submit employee indicative data only, choose **Create New Non-Financial Payroll** and follow the same process below:

- Choose a **Client Work Order Type Name** from the drop-down menu. The name will typically be your plan number and division code, if applicable. (Note: special cases may call for other naming conventions.)
- Type in a **Description**, i.e., plan name, pay frequency and date, or anything of your choosing
- Enter **Dates** (Start, End, and Due date) – please enter the check date in all 3 boxes
- Choose your **payroll frequency** from the drop-down menu
- **Do NOT check test mode**
- Click **Create**



You’ll get a message that your request is being processed. You may view Work Order details by selecting the “Here” link or choose the **Advanced Search** to return to the Work Order list screen.



Data Submission

Locate the appropriate work order and click on **Begin Entry** in the **Actions Required** column on the right side of the screen.


- **Populate an Existing Work Order** – Choose the process for how you’d like to submit data (file upload or prepopulate for manual entry). For the initial file upload, you’ll need to coordinate with the Census team to create a map that will read your file. Then, you’ll use the same format for future files.
- Depending on your setup, you’ll access the following screens:
 - **Populate Work Order via File Upload** – Browse to choose your file from your directory, then choose Upload
 - **Prepopulate With Recordkeeping Data** – This process will gather your current employee data from our recordkeeping system and allow you to manually edit and update.

After completing the steps above, you'll receive a confirmation/successful message. This message means the system is reading your file or gathering your current data. You may choose **Click [here](#) to view the Work Order Detail screen** or select **Advanced Search** to see the status of your Work Order and available **Action** icons.

Note: You'll need to refresh your screen as the system goes through multiple steps. To refresh your status, click on the **Advanced Search** link at the top of the screen or you may also use your browser refresh feature.

Status List and Meaning

Below is a list of the various status messages and actions you may see during the process:

- **Loading** – the system is reading your file or gathering current data; please wait and refresh.
- **In Process** – the system has retrieved your current data file. You may now select the **Edit Data** action to update your information. After entering your data, click **Save** and then **Complete**. Be sure to review and verify the totals before submitting.
- **File Loading Error** – this status means there is something wrong with your file and a message was sent to the Census Team. For this status, click on **View Loading Errors and Reset**. Important: **DO NOT RESET!** Please delete the Work Order and add a new one. The reset function may erase your new data; we are working on a fix for this issue and hope to have it resolved soon.
 - To delete the Work Order, click on the **Delete** link or **Trash Can** icon under **Actions**
 - Now type a reason for future reference and then click on the Delete button.
 - Now proceed to add a new work order (instructions are above).
- **Awaiting Light Validations** – the system is reviewing the information for data or formatting issues. Please wait and refresh.
- **Errors Found** – this status means there are data or formatting errors that you need to correct. Click on the  which is the **Correct Errors** icon to view and edit errors, click on the **Save** button, then select **Complete** to see the summary page. Check the summary details, then **Submit**. You'll see a new confirmation message again. You may now go back to either the Work Order Detail Screen or Advanced Search screen.
- **Awaiting Host Validations** – the system is reviewing your data against the Recordkeeping system for plan document level errors. Please wait and refresh.
- **BPAS Reviewing** – this status means there are errors at a plan document level that the BPAS processing team will review and correct within 1-3 business days. You'll receive an email when completed.
- **Funding Page Initiation** – the system has completed the validation review and is building the funding page.
- **Awaiting Funding Approval** – this status means all validations have been reviewed and you may now do the final approval for BPAS to process the data. You'll get an email notification when this status is ready.

Icon Guide



- | | |
|----------------------|-----------------------------|
| 1 View Data | 6 Reset |
| 2 Work Order Details | 7 View Validation History |
| 3 View Notifications | 8 Delete Work Order |
| 4 Edit Data | 9 View Validation Errors |
| 5 Correct Errors | 10 View and Approve Funding |



Funding Approval

Log into your CPro2 account at: <https://censuspro.bpas.com/DVW/>

- Locate the appropriate work order under the **Work Order Listing** using the work order number from the Funding Approval email you received from noreply@bpas.com
 - Status should read **Awaiting Funding Approval**
 - Under **Actions** on the right, click on the **View and Approve funding** icon
- You should see the **Funding Approval** page at this time – please review the data carefully.
- If you **agree** with the data, Click **Approve** to complete the work order.
- Once you click on **Approve**, you’ll see a Funding Approval confirmation page. At the bottom, you’ll see a **Done** and **Print** button.
 - You may click **Print** to keep a copy of this confirmation.
 - Click on **Done** for a secondary confirmation.
- Congratulations. This completes your work order submission. You may click on **Advanced Search** to return to the Work Order listing screen to review other work orders or you may log out at this time.
- If you **DO NOT agree** with the data, please click **Cancel** to return to the Work Order listing screen and follow the instructions below for next steps.

Did BPAS Make Adjustments?	Did BPAS Not Make Adjustments?
<ul style="list-style-type: none"> • Click on the View Data button for a read-only version of all your data. • Choose Participant Notes under Filter on, then click Search. The results will show you anyone that was adjusted. • Click on the Note icon to see what was done. • Once you are done click the Advanced Search link at the top of the screen and follow the steps above to approve. 	<ul style="list-style-type: none"> • Click the Edit Data icon to see a list of all employees with multiple data tabs. • Find and correct any incorrect data. • When complete, select Save followed by Complete. • You’ll see a summary page showing totals. If the data is correct, select Submit to send the data back to BPAS for review. • You may now log out and wait for a new Funding Approval email notice to start the approval process steps listed above.



One Company. One Call.

WE'RE HERE TO HELP

When we receive complete and accurate census data from you at the close of each plan year, we can administer your retirement plan, find potential issues before they become problematic, and help your plan stay compliant.

CensusPro2



Questions? Let's talk.
☎ 315.292.6970 | ✉ census@bpas.com | 💻 bpas.com

