

# CensusPro 2 Tutorial

Uploading an Excel file  
Making a Contribution



**BPAS**

Health & Welfare Plans



# Getting Started

## 1. CensusPro2 Credentials

- *Note: Both username and password are case sensitive*

## 2. Create Upload File

- Fill in template provided from BPAS.

- Follow Formatting to avoid Loading Errors.

**SAVE** file as an excel workbook (xlsx extension)

Data Entry Starts →  
On Row 5

	A	B	C	D	E	F	G
1	BPAS Plan Number	SSN	First Name	Last Name	leave	Active Claims Eligible (D)	Post Employment Claims Eligible (F)
2	Required	###-##-####			blank	Two decimal, no \$ Signs	Two decimal, no \$ Signs
3	6 digit						
4	Change to yours					For use while still employee	For use after termination
5	000128	123-45-6789	Jane	Doe		0.00	350.00
6	000128	333-33-3128	Penelope	Penny		2000.00	0.00
7							

# Create New Work Order / File Upload

- Navigate to <https://censuspro.bpas.com/>

Home Screen: Payroll >  
Create New Financial Payroll

Create Work Order / Add Work Order

Add Work Order: Financial

Client Name:

Client Work Order Type Name:

Description:

StartDate:

EndDate:

DueDate:


Frequency:

Test Mode:

\* - Designates Required Field.

Create



Home Screen: Work Order Status = NEW  
Click on , the begin entry icon to upload file.

Status	Amount	Work Order Id	Actions
Awaiting Posting	\$2,000.00	209884	   
New	\$0.00	210396	   



Browse for your file and Upload

BPAS | Home - Payroll - Reports - | Quick Work Order ID Search | Advanced Search

VEBA DEMO

Dashboard / Work Order Details / Begin Entry / Upload File

Upload A File

Please select a file to upload for your Work Order that has a proper XLSX extension. The extension must be all lower case.

Browse...

Cancel | Change Entry Method | Upload

# Work Order Status



**Loading** → **In Process** → **Loading Error** (Double check your template) →  
**Awaiting Light Validations** → **Errors Found** (View and correct errors) →  
**Awaiting Host Validations** → **BPAS Reviewing** (Log off BPAS will review) →  
**Awaiting Funding Approval** (View and approve funding using \$ button)



Approvals *before* 3:30 pm EST → posted same business day  
 Approvals *after* 3:30 pm EST → posted the next business day



ACH debit → investing of monies will occur on posting date  
 Checks or wires → investing of monies will occur once BPAS has received the assets

## Need Assistance? We're here to help!

- Contact the Census Department
  - M-F 7am-4pm CST
  - (p) 315-292-6970
  - email: census@bpas.com



# Frozen VEBA's



## “Frozen” VEBA HRA

- For those participants that have a HSA account, they will not be able to have a HRA or PRA VEBA account.
  - *The IRS doesn't allow multiple plan types to be used towards medical claim purposes.*
- A participant that has a HSA can choose to have a Limited Purpose HRA (LHRA) to be used only for dental and vision or a **FHRA**.
- A FHRA is a “Frozen” VEBA HRA account that allows a participant to continue receiving contributions but doesn't allow for claims reimbursements.
  - *The monies will continue to be invested in the participant's desired fund elections and continue to earn, however the HRA account balance will not be available to spend.*

# Frozen VEBA HRA Balances

HEALTH SAVING ACCOUNT		VEBA	
	AVAILABLE		AVAILABLE
Cash Account	\$3,678.17	VEBA Frozen Health Rei... ?	\$6,996.32
Investment Account	\$0.00		



# Sponsor Web for VEBA's



# Main Page

- On the initial page you will find basic plan information such as plan name, BPAS Consultant, plan sponsor contact and percentage of employees participating in the VEBA.

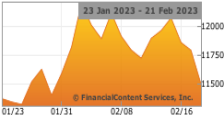
Welcome to the Plan Sponsor website

[Action Items](#)

Nasdaq Composite

↓ 11492.30 -294.97 (-2.50%)

■ Nasdaq Composite (COMP)



© FinancialContent Services, Inc.

↓ Nasdaq 11492.30 -294.97 (-2.50%)

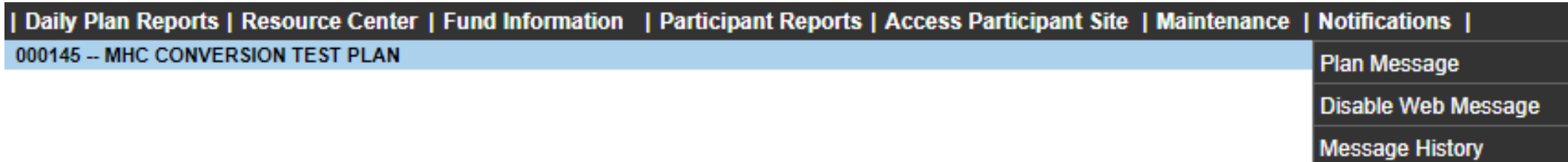
↓ SPX 3997.34 -81.75 (-2.00%)

Enter Symbol or Company

General Plan Information	
Plan Name	MHC CONVERSION TEST PLAN
BPAS Plan Account ID	000145
Consultant	AMY SHAUB
Consultant E-mail	ashaub@bpas.com
Telephone Number	1-866-401-5272
Plan Sponsor Contact	
Total Active Participants	0
Total Eligible Employees	1
Percent of Eligible Employees Participating	0%
Current Balance	\$0.00



# Notifications Tab



Under the notifications tab, you will find options to have a standardized message displayed to all participants. The message is completely up to you and can be done indefinitely or within a certain time frame. You will also have the ability to disable messages as well as see a message history. Participants will see these messages pop up when they first land on the BPAS participant portal.

# Accessing the Participant Portal

| [Daily Plan Reports](#) | [Resource Center](#) | [Fund Information](#) | [Participant Reports](#) | [Access Participant Site](#) | [Maintenance](#) | [Notifications](#) |

000145 -- MHC CONVERSION TEST PLAN

[View Participant](#)

**Enter a complete and valid SSN, or the last four digits of an SSN:**

SSN:  -  -

**Or enter the first few characters of the participant's last name.**

Name:  [Submit](#) [Reset Entries](#)

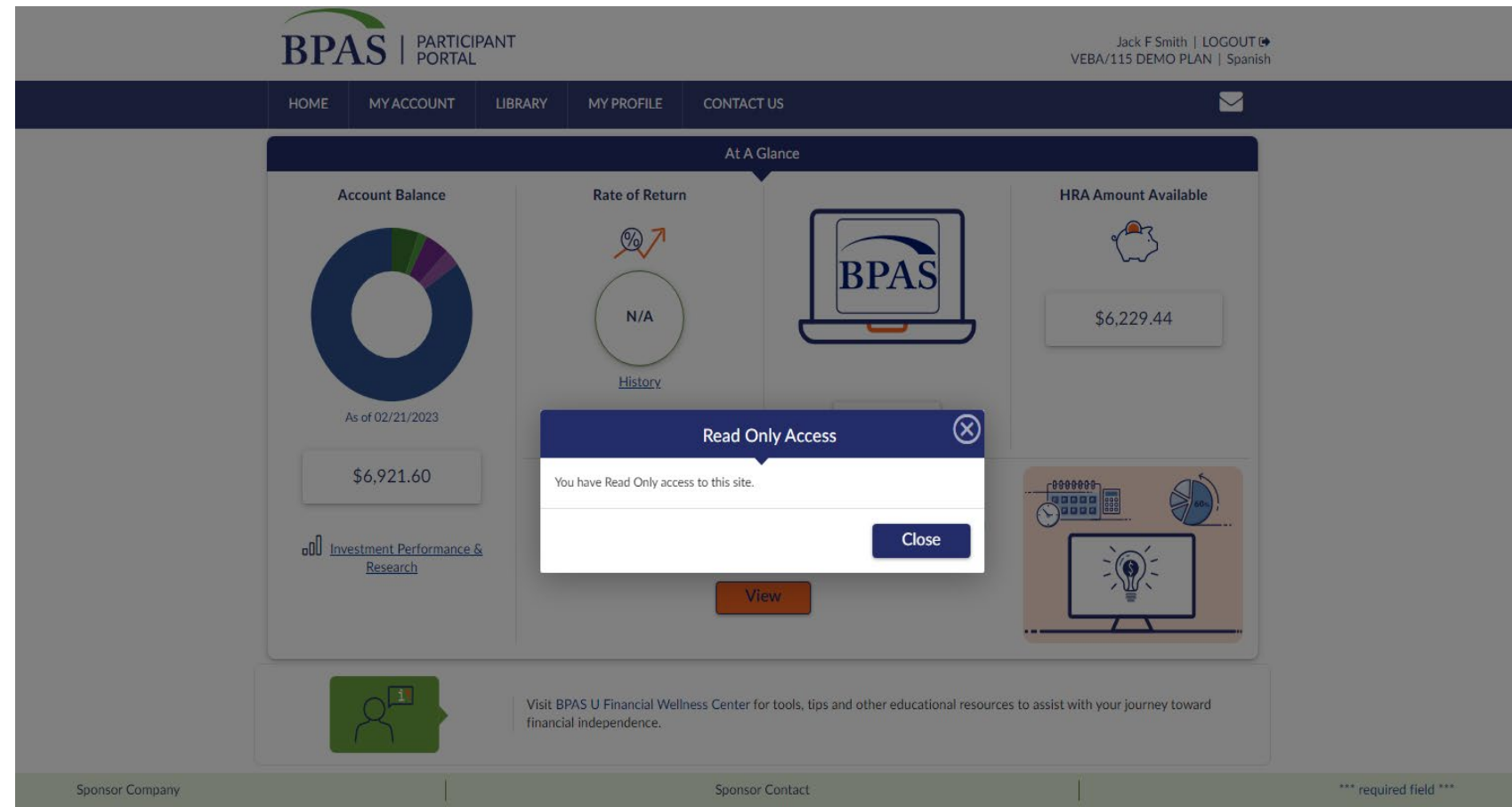
To view a participant's account on the BPAS portal, you can click on View Participant under the Access Participant Site tab.

Participants can be searched by SSN, last four of SSN or last name.

\*Helpful Hint: click one space in the Name field to pull up the entire participant population

# Participant Portal

\*\*\*Plan Sponsors have read-only access in the participant portal. They will be able to see most of what the participant sees however they will not be able to make any transactions on behalf of the participant.

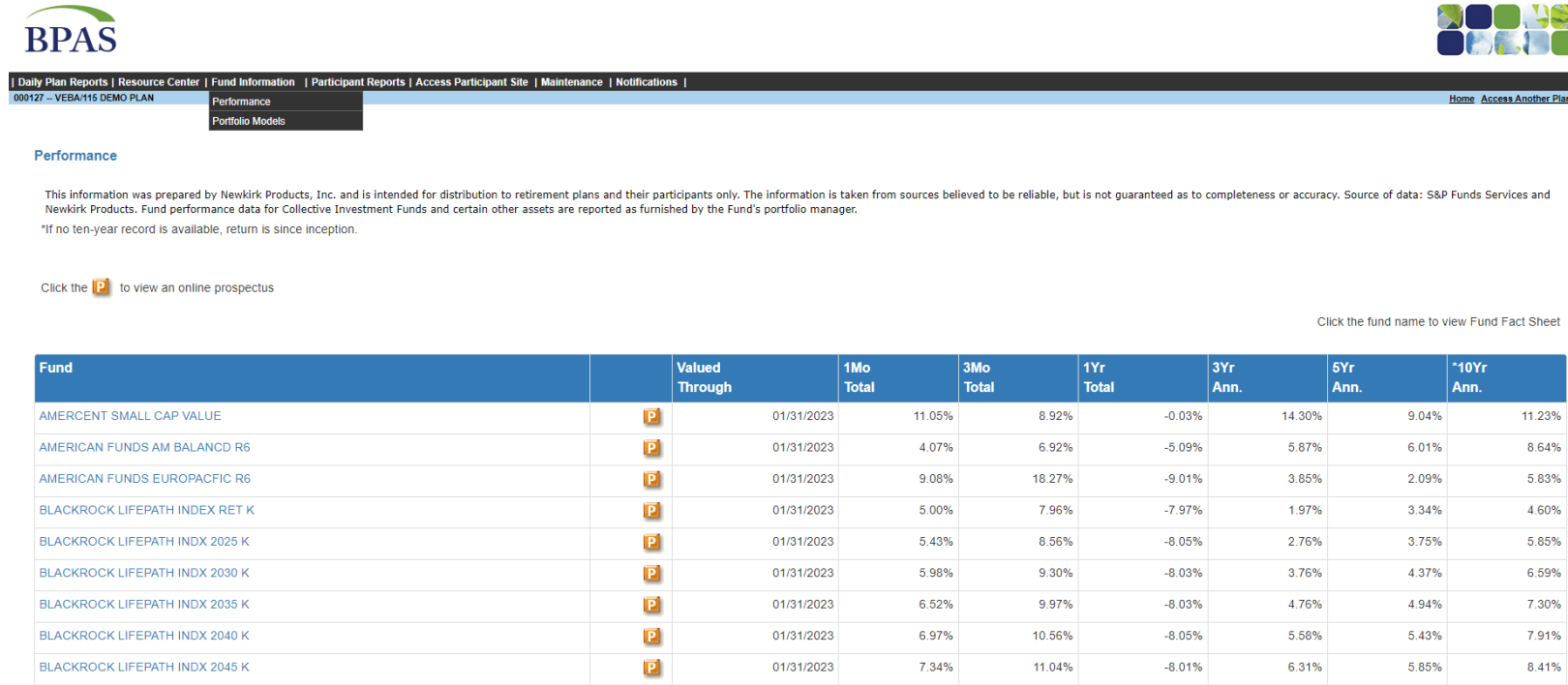




# Fund Information

Under the Fund Information tab, You will find fund related items like prospectus' and data on monthly and yearly returns.

This Data is updated on the dates shown in the “valued through” column.



The screenshot shows the BPAS Fund Information page for plan 000127 - VEBAL15 DEMO PLAN. The 'Performance' tab is selected, displaying a table of fund performance data. The table includes columns for Fund name, Valued Through date, and returns for 1, 3, 6, and 10 years. A prospectus icon is visible for each fund entry.

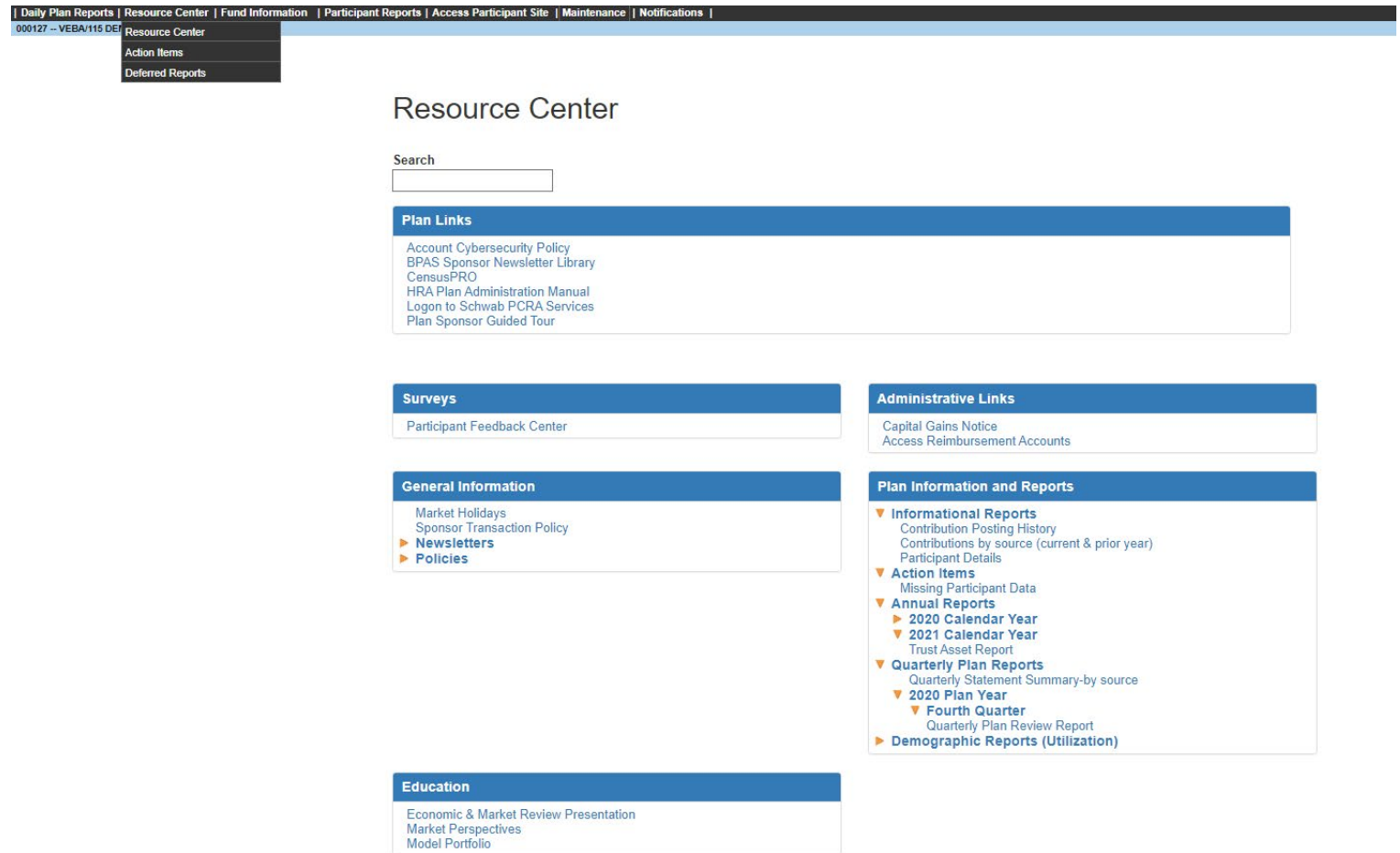
Fund	Valued Through	1Mo Total	3Mo Total	1Yr Total	3Yr Ann.	5Yr Ann.	*10Yr Ann.
AMERCENT SMALL CAP VALUE	01/31/2023	11.05%	8.92%	-0.03%	14.30%	9.04%	11.23%
AMERICAN FUNDS AM BALANCD R6	01/31/2023	4.07%	6.92%	-5.09%	5.87%	6.01%	8.64%
AMERICAN FUNDS EUROPACIFIC R6	01/31/2023	9.08%	18.27%	-9.01%	3.85%	2.09%	5.83%
BLACKROCK LIFEPAATH INDEX RET K	01/31/2023	5.00%	7.96%	-7.97%	1.97%	3.34%	4.60%
BLACKROCK LIFEPAATH INDX 2025 K	01/31/2023	5.43%	8.56%	-8.05%	2.76%	3.75%	5.85%
BLACKROCK LIFEPAATH INDX 2030 K	01/31/2023	5.98%	9.30%	-8.03%	3.76%	4.37%	6.59%
BLACKROCK LIFEPAATH INDX 2035 K	01/31/2023	6.52%	9.97%	-8.03%	4.76%	4.94%	7.30%
BLACKROCK LIFEPAATH INDX 2040 K	01/31/2023	6.97%	10.56%	-8.05%	5.58%	5.43%	7.91%
BLACKROCK LIFEPAATH INDX 2045 K	01/31/2023	7.34%	11.04%	-8.01%	6.31%	5.85%	8.41%

# Resource Center

The Resource Center is the most popular tab in Sponsor Web. This is where you will find all VEBA based reports.

The Plan Information and Reports section houses all plan level reports. A couple common reports: Participant Details - demographic information and balances for the entire plan by participant Trust Asser Reports – certified trust reporting of all activity based on quarter or annual QPRR - offers a wide angle view of the plan and historical data.

*(The data on most reports are updated weekly. Run dates are listed within the reports.)*



The screenshot shows the BPAS Resource Center web interface. At the top, there is a navigation bar with links: Daily Plan Reports, Resource Center (selected), Fund Information, Participant Reports, Access Participant Site, Maintenance, and Notifications. Below the navigation bar, there is a search box and a dropdown menu for the Resource Center, which includes links for Action Items and Deferred Reports. The main content area is titled "Resource Center" and contains several sections:

- Plan Links:** Account Cybersecurity Policy, BPAS Sponsor Newsletter Library, CensusPRO, HRA Plan Administration Manual, Logon to Schwab PCRA Services, Plan Sponsor Guided Tour.
- Surveys:** Participant Feedback Center.
- Administrative Links:** Capital Gains Notice, Access Reimbursement Accounts.
- General Information:** Market Holidays, Sponsor Transaction Policy, Newsletters, Policies.
- Plan Information and Reports:**
  - Informational Reports:** Contribution Posting History, Contributions by source (current & prior year), Participant Details.
  - Action Items:** Missing Participant Data.
  - Annual Reports:** 2020 Calendar Year, 2021 Calendar Year, Trust Asset Report.
  - Quarterly Plan Reports:** Quarterly Statement Summary-by source, 2020 Plan Year, Fourth Quarter, Quarterly Plan Review Report.
  - Demographic Reports (Utilization)**
- Education:** Economic & Market Review Presentation, Market Perspectives, Model Portfolio.

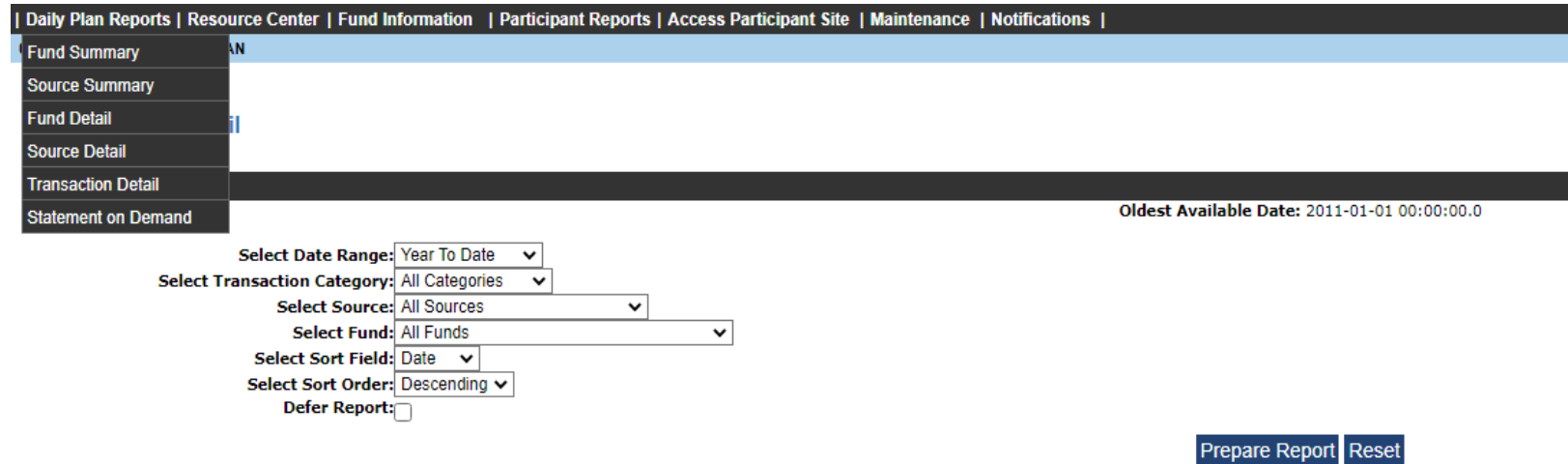
# Daily Plan Reports

Daily Plan Reports allows you to run any transactional report at any frequency.

The Summary and Detail reports show the monies in the VEBA by source and fund.

Transaction detail can be filtered using the filters shown on the right. This will show transactions based on the date range chosen.

Statement on demand will provide a quick snapshot of the VEBA HRA plan based on the date range selected.



The screenshot displays the BPAS web interface for generating reports. At the top, a navigation bar includes links for 'Daily Plan Reports', 'Resource Center', 'Fund Information', 'Participant Reports', 'Access Participant Site', 'Maintenance', and 'Notifications'. A dropdown menu is open, listing report types: 'Fund Summary', 'Source Summary', 'Fund Detail', 'Source Detail', 'Transaction Detail', and 'Statement on Demand'. Below the menu, a set of filters is visible: 'Select Date Range' (Year To Date), 'Select Transaction Category' (All Categories), 'Select Source' (All Sources), 'Select Fund' (All Funds), 'Select Sort Field' (Date), and 'Select Sort Order' (Descending). A 'Defer Report' checkbox is present and unchecked. On the right side, the text 'Oldest Available Date: 2011-01-01 00:00:00.0' is displayed. At the bottom right, there are two buttons: 'Prepare Report' and 'Reset'.

# Transaction Detail

## Transaction Detail

Plan: VEBA/115 DEMO PLAN

Run New Report

Date Range: Other - 01/01/2022 To 02/02/2023

Transaction Category: All Categories

Source: All Sources

Fund: All Funds

Sort Field: Process Date (Descending)

Download To:

Click the arrow to the left of the category to view details.

Displaying page 1 of 1

Transaction Category	Amount
▶ Contribution	\$1,450.00
▶ Plan Xfer Out	\$75.00

 [Printer-Friendly Page](#)

Displaying page 1 of 1

# Statement on Demand

**Plan Totals**

Select Date Range:

Oldest Available Date: 01/01/2011

Defer Report:

[Submit](#)

[Reset Entries](#)

By choosing to defer the report you will be free to navigate to other areas of our website as well as any other sites on the internet. You can then return to this site and view your report under the Deferred Reports menu. However, if you are still logged in at the time of completion, you will be notified via a pop-up message.

**VEBA/115 DEMO PLAN**

Sponsor Address 1  
Sponsor Address 2  
Utica, NY 13502

Your Statement of Account for the Period  
01/01/2023 through 02/22/2023

**Activity by Fund 01/01/2023 through 02/22/2023**

Fund	Beginning Balance	Contributions	Earnings Gain Loss	HRA Other Withdrawals	Transfers	Fees Expenses	Other	Ending Balance
FRANKLIN SMALL CAP VALUE	423.61	0.00	25.10	0.00	0.00	0.00	0.00	448.71
HARBOR INTERNATIONAL	102.33	0.00	6.89	0.00	0.00	0.00	0.00	109.22
HB&T METLIFE STABLE VALUE R1	2,326.17	0.00	7.05	0.00	0.00	0.00	0.00	2,333.22
HEARTLAND VALUE PLUS INSTL	436.66	0.00	22.31	0.00	0.00	0.00	0.00	458.97
INVESCO DEVELOPING MKTS Y	527.56	0.00	40.60	0.00	0.00	0.00	0.00	568.16
PIMCO HIGH YIELD INSTL	58.93	0.00	0.16	0.00	0.00	0.00	0.00	59.09
PIMCO TOTAL RETURN INSTL	279.50	0.00	0.67	0.00	0.00	0.00	0.00	280.17
SCHWAB S&P 500 INDEX	752.02	0.00	32.76	0.00	0.00	0.00	0.00	784.78
STABLE VALUE FUND	61,767.51	0.00	0.00	0.00	0.00	0.00	0.00	61,767.51
T. ROWE PRICE MID-CAP GROWTH	308.90	0.00	21.18	0.00	0.00	0.00	0.00	330.08
T. ROWE PRICE MID-CAP VALUE	517.81	0.00	41.46	0.00	0.00	0.00	0.00	559.27
TOUCHSTONE SMALL COMPANY Y	647.81	0.00	42.02	0.00	0.00	0.00	0.00	689.83
VANGUARD INFLATION-PROT SEC	325.51	0.00	1.67	0.00	0.00	0.00	0.00	327.18
VANGUARD MID-CAP INDEX SIGNAL	51.10	0.00	0.00	0.00	0.00	0.00	0.00	51.10
<b>Grand Total</b>	<b>68,525.42</b>	<b>0.00</b>	<b>241.87</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>68,767.29</b>

**Activity by Source 01/01/2023 through 02/22/2023**

Source	Beginning Balance	Contributions	Earnings Gain Loss	HRA Other Withdrawals	Transfers	Fees Expenses	Other	Ending Balance
EMPLOYER CONTRIBUTION	68,525.42	0.00	241.87	0.00	0.00	0.00	0.00	68,767.29
<b>Grand Total</b>	<b>68,525.42</b>	<b>0.00</b>	<b>241.87</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>68,767.29</b>

[Printer-Friendly Page](#)



# Resources For Your MHC VEBA HRA Overview Document





**Minnesota  
Healthcare  
Consortium**  
Participating Minnesota Service Cooperatives

# RESOURCES FOR YOUR MHC VEBA HRA



ALL OF YOUR PLAN SPONSOR  
RESOURCES ARE LOCATED AT  
[HTTPS://VIMEO.COM/SHOWCASE/  
BPASMHC](https://vimeo.com/showcase/bpasmhc)  
FOR YOUR CONVENIENCE

THROUGHOUT THIS SLIDESHOW, THERE ARE  
SCREENSHOTS AND SHORT DESCRIPTIONS  
OF THE AVAILABLE ITEMS. CLICK ON THE  
IMAGE TO NAVIGATE DIRECTLY TO A  
PARTICULAR DOCUMENT OR VIDEO.  
TO REVIEW EVERYTHING, SCAN OR CLICK ON  
THE QR CODE.

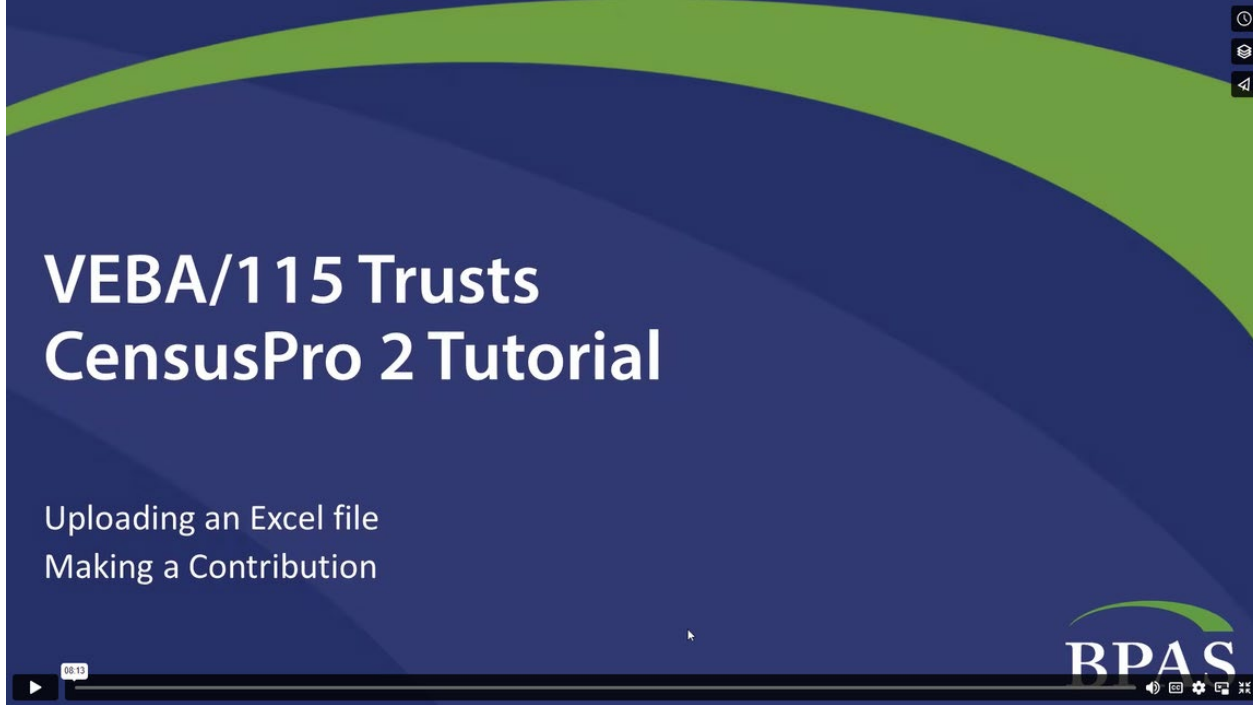


**Minnesota  
Healthcare  
Consortium**  
Participating Minnesota Service Cooperatives



# CENSUS PRO 2

## RESOURCES



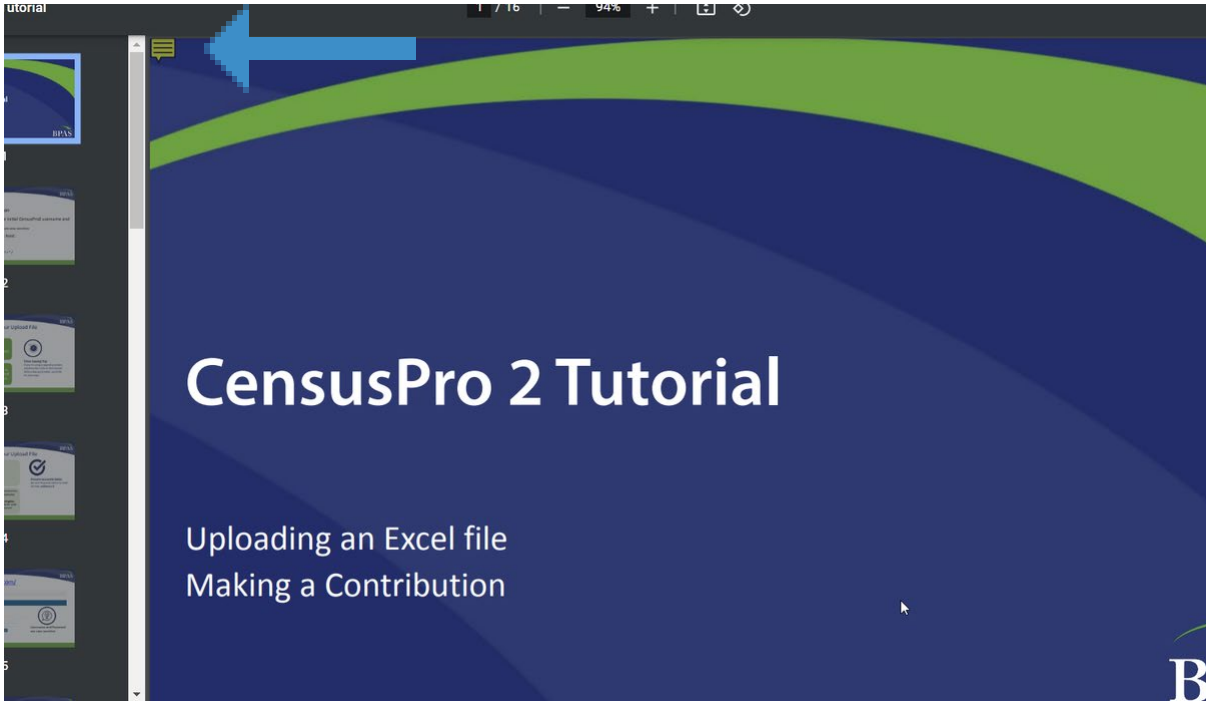
## VIDEO TUTORIAL

Learn how to upload the Excel file and make contributions.

Click the image to navigate to the video.

CENSUS PRO 2 RESOURCES





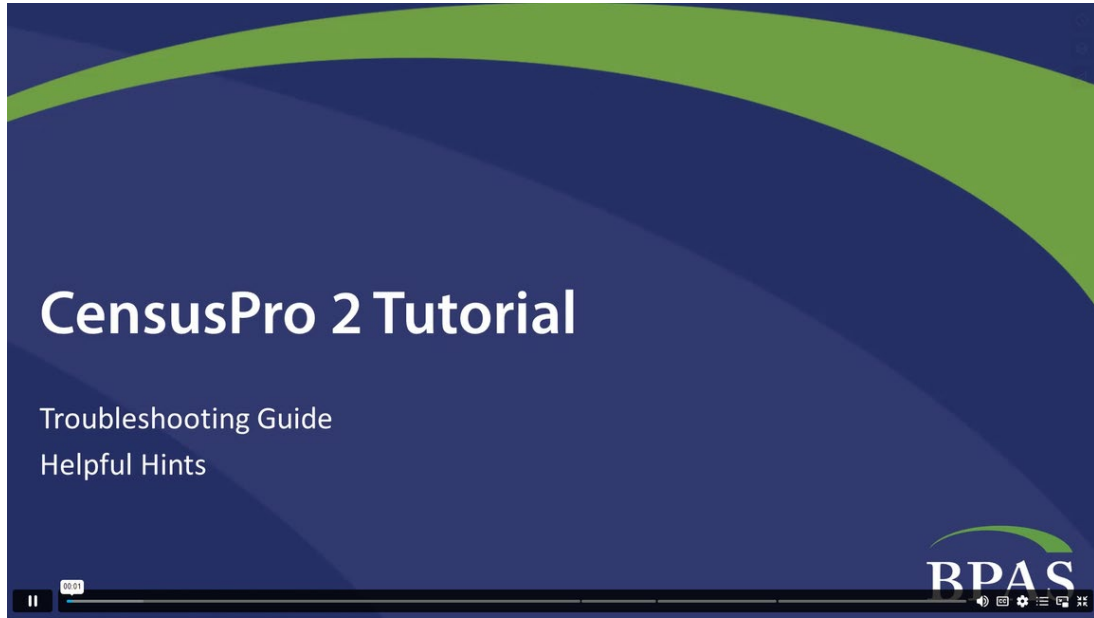
## SLIDES

Prefer a slideshow instead?

Hint: the yellow comment option on the top left includes notes!

Click the image to navigate to the document.

CENSUS PRO 2 RESOURCES



## TROUBLE SHOOTING VIDEO

Our troubleshooting guide provides quick tips to common questions.

Click the image to navigate to the video.

CENSUS PRO 2 RESOURCES

1 / 3 | - 100% + | [ ] [x]

**BPAS** CensusPro2 User Guide

### Login to Your CPro2 Account

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

- 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.

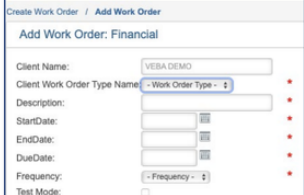
Password requirements: 8 characters; at least 1 uppercase letter, 1 lowercase letter, 1 number, and one special character: '! " \$ % & # ( ) = ? + \* /

### 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




# USER GUIDE

A convenient overview for using  
CensusPro2!

Click the image to navigate to the document.

CENSUS PRO 2 RESOURCES

1 / 3 | - 90% + | [Home] [Refresh]


FAQ

<b>Where do I login to CensusPro2?</b>	You may access CensusPro2 (CPro2) directly at <a href="https://censuspro.bpas.com/DVW/">https://censuspro.bpas.com/DVW/</a> . Or, you may login from the home page at <a href="https://bpas.com">bpas.com</a> .
<b>Where can I get help with the CensusPro2 site and submitting contributions?</b>	The BPAS Census team is available to help you learn and navigate the CPro2 site. The team is available Monday through Friday from 8 am to 5 pm ET (7 am to 4 pm CT). You can call them directly at 1-315-292-6970 or email <a href="mailto:census@bpas.com">census@bpas.com</a> .
<b>What do I do if I get a message that says "BPAS reviewing file?"</b>	BPAS receives MHC employee data from WEX. You'll need to first enter new employee information into the WEX Leap system ( <a href="https://employerbenefits.wexhealth.com/">https://employerbenefits.wexhealth.com/</a> ). Wex then transfers employee data to BPAS daily and it gets posted overnight. If you get an error message, log off and wait 1-3 business days for the processing team to review. The Census Department will follow up with you if the errors persist.
<b>How do I get full employee data over to BPAS? Also what is the timing of this transfer?</b>	You'll need to enter new employee information in the WEX Leap system ( <a href="https://employerbenefits.wexhealth.com/">https://employerbenefits.wexhealth.com/</a> ). Be sure to flag new employees as VEBA eligible so the data flows over to BPAS. New data entered into the Leap system before 1 p.m. ET will be posted to the BPAS system that evening.
<b>What are the two types of contributions on the file template and in CensusPro2?</b>	There are two contributions types for MHC clients (not all clients use both): <ol style="list-style-type: none"> <li>1. Active Claims Eligible (D): Contributions that may be used while still employed.</li> <li>2. Post-Employment Claims Eligible (F): Contributions that may be used after separation from employment.</li> </ol> <p>Contribution types are based on when an employee may use the funds, NOT the employee status at the time of the contribution.</p>
<b>On the Template file what goes in the BPAS Plan Number column?</b>	Each plan has a BPAS plan number or also known as a Group Number. This number is 6 digit long and starts with 486XXX. Your Plan Number will be in the subject line of the initial email you receive from the census team. Once you log into your CensusPro2 account, you can review your Plan Number by selecting the drop down located under Participant Group.
<b>On the template file, can I</b>	No. Your real data must start on line 5. Whether you leave the column headers or not, CensusPro2 will ignore the first 4 lines of the file.

# FREQUENTLY ASKED QUESTIONS

FAQs to help you with Census Pro 2.

Have additional questions? Please contact the Census team at:

- [census@bpas.com](mailto:census@bpas.com)
- 315.292.6970

Click the image to navigate to the document.

CENSUS PRO 2 RESOURCES



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# PLAN SPONSOR PORTAL

## RESOURCES



## VIDEO TOUR

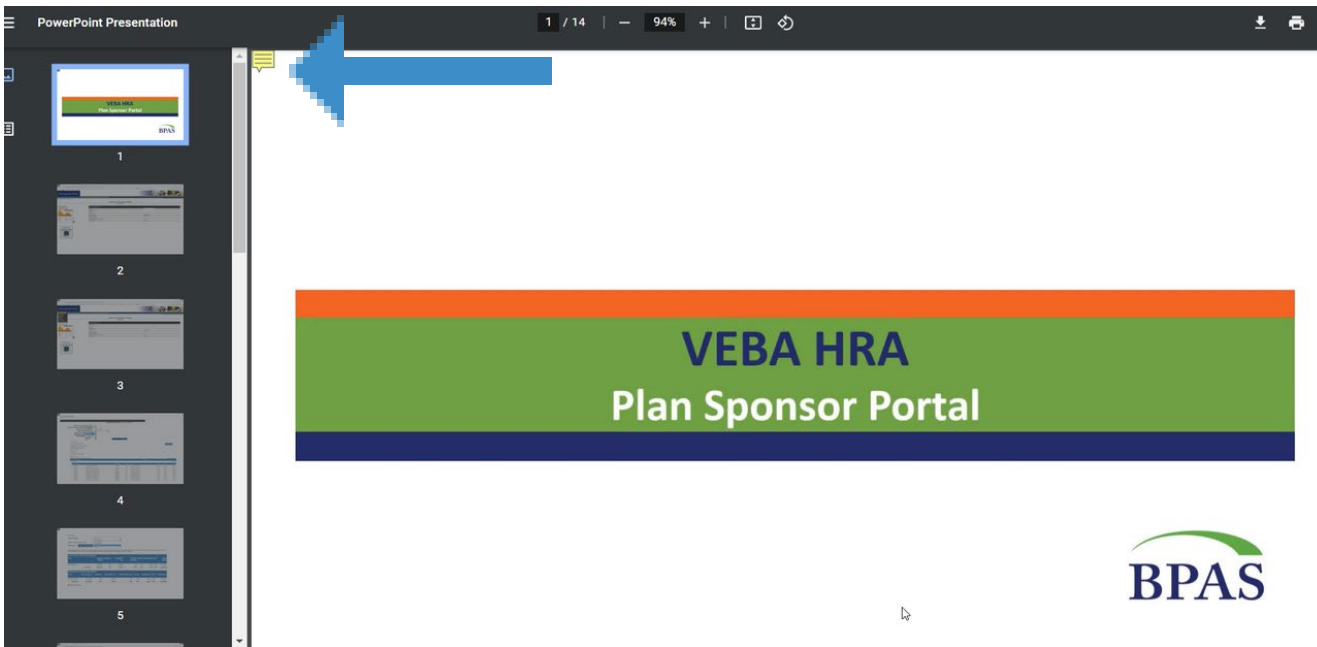
A quick overview of navigating the Plan Sponsor Portal.

Please note that some items may not appear based upon timing, plan provisions and more.



Click the image to navigate to the video.

PLAN SPONSOR PORTAL RESOURCES



# SLIDES

Prefer a slideshow instead?

Hint: the yellow comment option on the top left includes notes!

Please note that some items may not appear based upon timing, plan provisions and more.

Click the image to navigate to the document.

PLAN SPONSOR PORTAL RESOURCES



# SLIDES

Print off the guide to take notes, or to indicate specific areas of interest.

Please note that some items may not appear based upon timing, plan provisions and more.

Click the image to navigate to the document.

PLAN SPONSOR PORTAL RESOURCES



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# PARTICIPANT

# RESOURCES



# ENROLLMENT GUIDE

For new employees, for all employees, this guide walks the participant through the basics of a VEBA HRA.

Feel free to share this resource with your employees!

Click the image to navigate to the document.

PARTICIPANT RESOURCES



## PARTICIPANT PORTAL DEMO

An overview video of the participant online experience.

Feel free to share this resource with your employees!

Click the image to navigate to the video.

PARTICIPANT RESOURCES





## PARTICIPANT PORTAL SLIDES


If you're planning an employee meeting, or want a reference for an occasional question, the slide version of the video will help.

Feel free to share this resource with your employees!

Click the image to navigate to the document.

PARTICIPANT RESOURCES

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**A Guide to the BPAS Participant Portal**

The BPAS Participant Portal is a great tool to help you get on the road to financial security. This guide provides an overview of the interactive website features available to help manage your account. Actual options and links available in your account may vary depending on your plan's configuration, design, and features.

Main Tab	Description
Home	<ul style="list-style-type: none"> <li><b>At-a-Glance:</b> a dashboard displaying account balance, investment balance mix, rate of return, debit card availability, access to the claims portal, and other features based on account type, plus a rotating block of announcements with quick links</li> <li><b>Messages:</b> view important account messages</li> </ul>
	<p><b>Summary</b></p> <ul style="list-style-type: none"> <li><b>Balance:</b> view account balance total and details by investment or source</li> <li><b>Activity:</b> personalize the transaction details report within a selected date range, filtered by category, source, fund, etc.; view confirmations; and review any daily pending transactions</li> </ul>

# PARTICIPANT WEB GUIDE

A quick roadmap of the participant site.

Feel free to share this resource with your employees!

Click the image to navigate to the document.

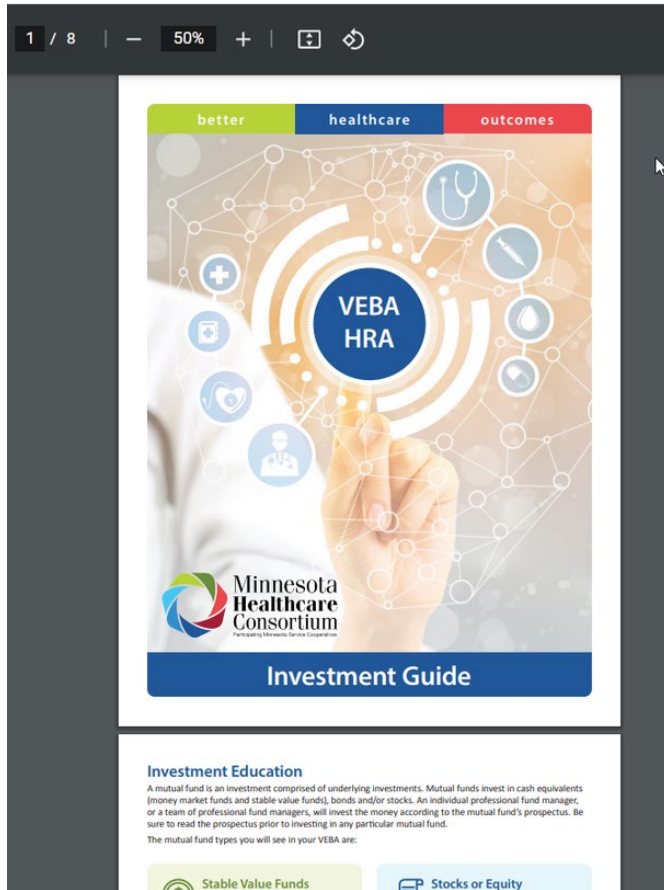


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Participating Minnesota Service Cooperatives



# INVESTMENT

## RESOURCES



# INVESTMENT GUIDE

An overview of investment types, selection questionnaire, FAQs and instructions on how to make changes within the participant portal.

Feel free to share this resource with your employees!

Click the image to navigate to the document.

INVESTMENT RESOURCES



FOR BPAS RELATED  
QUESTIONS, PLEASE  
CONTACT YOUR PLAN  
CONSULTANT

