



# CensusPro 2 Tutorial

Uploading an Excel file  
Making a Contribution

# Getting Started

## Obtaining Your Login Information

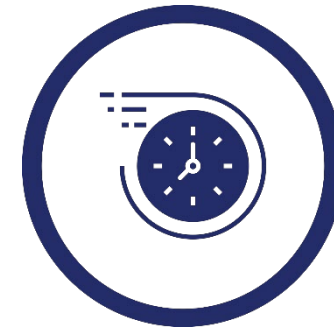
- BPAS will provide you with your initial CensusPro2 username and password
  - Note: Both username and password are case sensitive
- Your password must include at least:
  - 1 uppercase letter
  - 1 lowercase letter
  - 1 number
  - 1 special character: ' ! " \$ % & # ( ) = ? + \* /

# Getting Started: Creating Your Upload File



Follow the  
provided template

Be sure to save as  
an Excel Workbook  
(XLSX extension)



## **Time Saving Tip:**

If you're using a payroll provider, ask them for a file in this format. With a few quick edits, you'll be on your way!

# Getting Started: Creating Your Upload File

## Employee Information

(required fields may vary by plan)

- Social Security Number
- Name

## Financial Information

(type 0.00 in non applicable fields)

- **Active Claims Eligible:** contributions that can be used while employees are actively employed
- **Post Employment Claims Eligible:** contributions that can only be used upon termination or retirement



### Ensure accurate data:

Be sure financial data is in 0.00 format, **without a \$**.

<https://censuspro.bpas.com/>



Login


User name

Password



Username and Password  
are case sensitive

# Your CensusPro2 Home Page

Home ▾ Payroll ▾ Reports ▾Quick Work Order ID SearchWelcome **Demo!** [ Log Off ]VEBA DEMO[Advanced Search](#)[Change Password](#)

Dashboard / [Advanced Search](#)

### Advanced Search

**Work Order Type**  
- Work Order Group - ▾ - Work Order Type - ▾  Include Inactive

**Work Order Status**  
- Step - ▾ - Status - ▾

**Generation Method:** - Generation Method - ▾ **Frequency:** - Frequency - ▾ **Participant Group:** - Participant Group - ▾

**Date From:** 3/9/2022   **Date To:** 6/9/2022

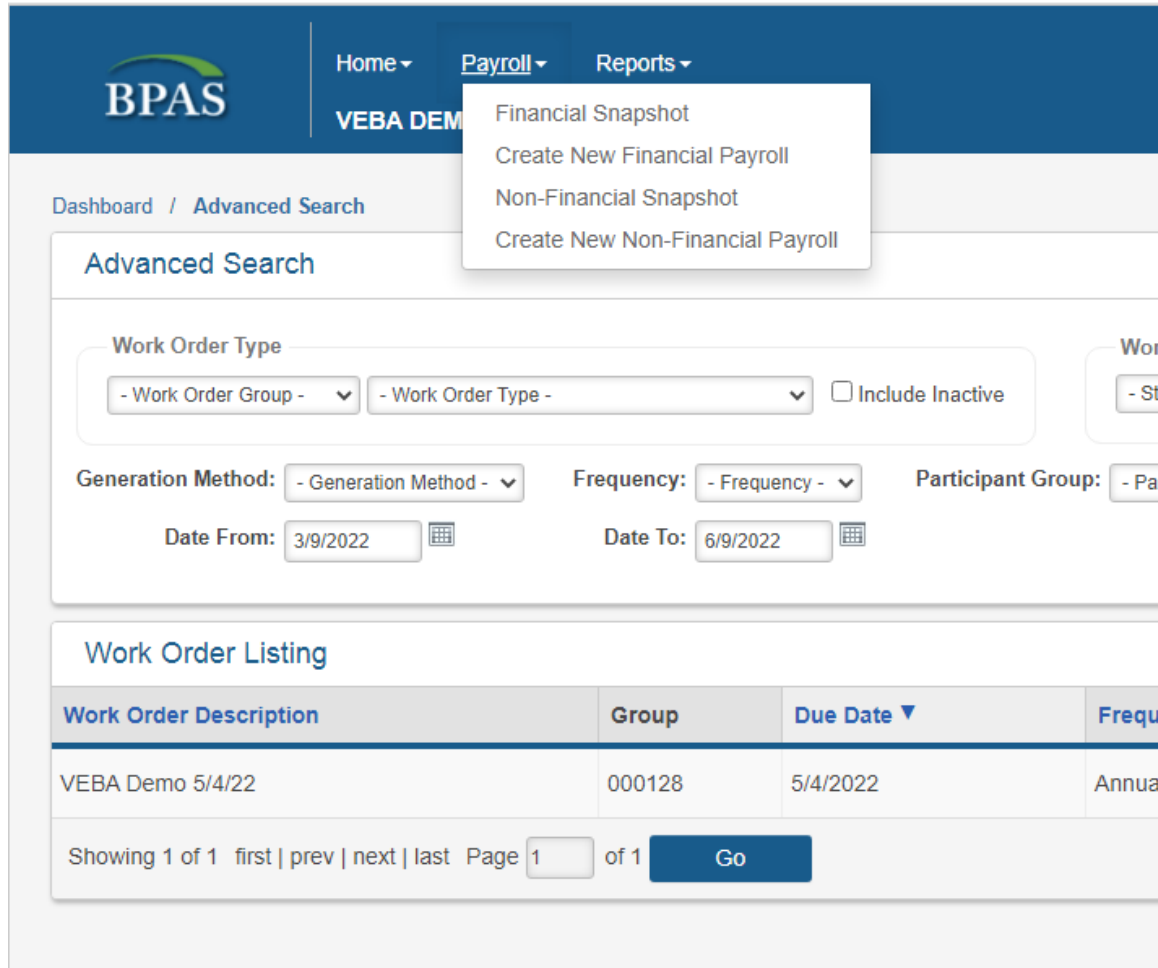
[Search](#) [Reset](#)

### Work Order Listing

Work Order Description	Group	Due Date ▾	Frequency	Type	Method	Status	Amount	Work Order Id	Actions
VEBA Demo 5/4/22	000128	5/4/2022	Annually	000128	Manual	New	\$0.00	138104	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✉</a> <a href="#">🗑</a>

Showing 1 of 1 [first](#) | [prev](#) | [next](#) | [last](#) Page  of 1 [Go](#)

# Submitting data and contributions



The screenshot shows the BPAS web application interface. At the top, there is a navigation bar with the BPAS logo and menu items: Home, Payroll, and Reports. The 'Payroll' menu is expanded, showing options: Financial Snapshot, Create New Financial Payroll, Non-Financial Snapshot, and Create New Non-Financial Payroll. Below the navigation bar, there is a 'Dashboard / Advanced Search' section. The 'Advanced Search' section contains several filters: 'Work Order Type' with dropdowns for '- Work Order Group -' and '- Work Order Type -', and an 'Include Inactive' checkbox; 'Generation Method' with a dropdown '- Generation Method -'; 'Frequency' with a dropdown '- Frequency -'; 'Participant Group' with a dropdown '- Par'; 'Date From' with a date field '3/9/2022' and a calendar icon; and 'Date To' with a date field '6/9/2022' and a calendar icon. Below the filters is a 'Work Order Listing' table with columns: 'Work Order Description', 'Group', 'Due Date', and 'Frequency'. The table contains one row: 'VEBA Demo 5/4/22', '000128', '5/4/2022', and 'Annual'. At the bottom of the table, there is a pagination control: 'Showing 1 of 1 first | prev | next | last Page 1 of 1 Go'.

Payroll






New Financial Payroll

# Add Work Order: Financial

Create Work Order / Add Work Order

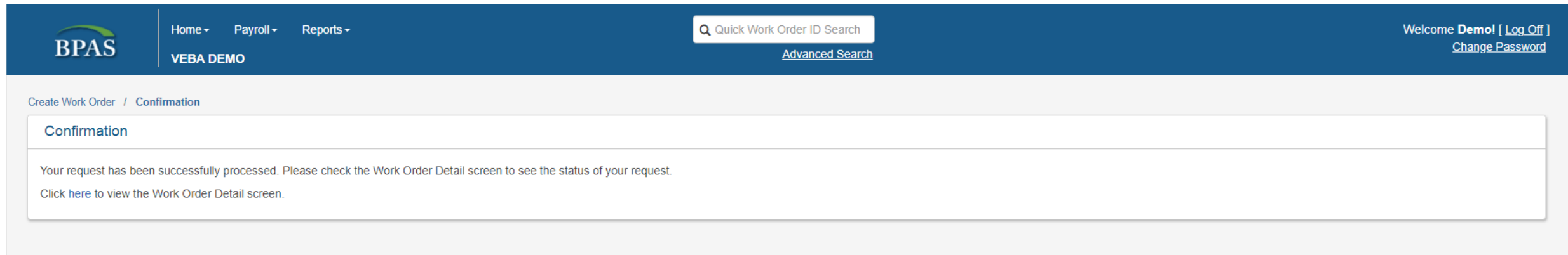
## Add Work Order: Financial

Client Name:	<input type="text" value="VEBA DEMO"/>	
Client Work Order Type Name:	<input type="text" value="- Work Order Type -"/>	*
Description:	<input type="text"/>	*
StartDate:	<input type="text"/> 	*
EndDate:	<input type="text"/> 	*
DueDate:	<input type="text"/> 	*
Frequency:	<input type="text" value="- Frequency -"/>	*
Test Mode:	<input type="checkbox"/>	

\* - Designates Required Field.



# Confirmation




The screenshot shows the BPAS VEBA DEMO interface. The top navigation bar includes the BPAS logo, menu items for Home, Payroll, and Reports, a search bar for Quick Work Order ID Search, and a link for Advanced Search. The user is logged in as Demo. The main content area shows a confirmation message: "Your request has been successfully processed. Please check the Work Order Detail screen to see the status of your request. Click here to view the Work Order Detail screen."



**Check your email!** You'll also receive a confirmation that your request was successfully processed.

# Uploading Your Excel File

 Home ▾ Payroll ▾ Reports ▾
Welcome **Demo!** [ [Log Off](#) ]  
[Change Password](#)

VEBA DEMO

[Advanced Search](#)

Dashboard / [Advanced Search](#)

### Advanced Search

**Work Order Type**

- Work Order Group - ▾

- Work Order Type - ▾

 Include Inactive

**Work Order Status**

- Step - ▾

- Status - ▾

**Generation Method:** - Generation Method - ▾
**Frequency:** - Frequency - ▾
**Participant Group:** - Participant Group - ▾

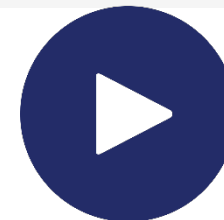
**Date From:**  
**Date To:**

Search
Reset

### Work Order Listing


Work Order Description	Group	Due Date ▾	Frequency	Type	Method	Status	Amount	Work Order Id	Actions
New Contribution File, adding Wonder Woman	000128	5/9/2022	SemiAnnual	000128	Manual	New	\$0.00	139037	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✉</a> <a href="#">🗑</a>
VEBA Demo 5/4/22	000128	5/4/2022	Annually	000128	Manual	New	\$0.00	138104	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✉</a> <a href="#">🗑</a>

Showing 1 - 2 of 2 first | prev | next | last Page  of 1 Go



**Begin Entry**

# Upload a File

Home ▾ Payroll ▾ Reports ▾[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.

# Confirmation



[Home](#) ▾ [Payroll](#) ▾ [Reports](#) ▾

VEBA DEMO

[Advanced Search](#)

Welcome **Demo!** [ [Log Off](#) ]

[Change Password](#)

[Dashboard](#) / [Work Order Details](#) / [Confirmation](#)

## Confirmation

Your request has been successfully processed. Please check the Work Order Detail screen to see the status of your request.  
[Click here to view the Work Order Detail screen.](#)

# Work Order Status

BPAS VEBA DEMO

Home ▾ Payroll ▾ Reports ▾

Quick Work Order ID Search

Welcome Demo! [ Log Off ]  
Change Password

Dashboard / Advanced Search

Advanced Search

Work Order Type: - Work Order Group - ▾ - Work Order Type - ▾  Include Inactive

Work Order Status: - Step - ▾ - Status - ▾

Generation Method: - Generation Method - ▾ Frequency: - Frequency - ▾ Participant Group: - Participant Group - ▾

Date From: 3/9/2022  Date To: 6/9/2022

Search Reset

Work Order Listing


Work Order Description	Group	Due Date ▾	Frequency	Type	Method	Status	Amount	Work Order Id	Actions
New Contribution File, adding Wonder Woman	000128	5/9/2022	SemiAnnual	000128	Manual	Errors Found	\$6,294.36	139037	
VEBA Demo 5/4/22	000128	5/4/2022	Annually	000128	Manual	New	\$0.00	138104	

Showing 1 - 2 of 2 first | prev | next | last Page 1 of 1  Go



**Loading → In Process → Loading Error (Double check your template) → Awaiting Light Validations → Errors Found (View and correct errors) → Awaiting Host Validations → BPAS Reviewing**

# Log Back in when the Status is Awaiting Funding Approval

 Home ▾ Payroll ▾ Reports ▾

[Advanced Search](#)

Welcome **Demo!** [ [Log Off](#) ]  
[Change Password](#)

Dashboard / [Advanced Search](#)

### Advanced Search

**Work Order Type**

- Work Order Group - ▾

- Work Order Type - ▾

Include Inactive

**Work Order Status**

- Step - ▾

- Status - ▾

**Generation Method:** - Generation Method - ▾











**Frequency:** - Frequency - ▾

**Participant Group:** - Participant Group - ▾

**Date From:**

Search
Reset

### Work Order Listing

Work Order Description	Group	Due Date ▾	Frequency	Type	Method	Status	Amount	Work Order Id	Actions
New Contribution File, adding Wonder Woman	000128	5/9/2022	SemiAnnual	000128	Manual	Awaiting Funding Approval	\$6,294.36	139037	     
VEBA Demo 5/4/22	000128	5/4/2022	Annually	000128	Manual	New	\$0.00	138104	   

Showing 1 - 2 of 2 first | prev | next | last Page  of 1 Go

# Review and Approve Totals

Dashboard / Work Order Details / Funding Approval

Initializing
Entry
Validating
Errors
Funding
Complete

Work Order: SemiAnnual 5/9/2022 000128

Work Order Messages

Funding Approval

Please verify the funding totals displayed below.

Source	000128 Work Order Total	Non-Financial Summary	
		Participant Count	6
ER Contribution 1	\$5,266.24		
ER Contribution 2	\$1,028.12		
Employee Pretax	\$0.00		
<b>SUBTOTAL:</b>	<b>\$6,294.36</b>		
<b>TOTAL:</b>	<b>\$6,294.36</b>		
<b>FUNDING TOTAL:</b>	<b>\$6,294.36</b>		



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



**Status =**  

---

**Complete!**