



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

With decades of experience, the BPAS census team is dedicated to enhancing systems and processes to improve our clients' experience. Our experts 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



Responsiveness: 8.9



Ease of File Submission: 8.5

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.



Import File

Sponsor (or payroll vendor) imports census file into CensusPro2



Edit Checks

BPAS receives file, performs edit checks, sends email to Sponsor when done.



Sponsor Approval

Sponsor logs into CensusPro2, reviews/approves ACH verification, including data corrections.



Initiate Purchase

If approved by 3:30 pm EST, BPAS initiates mutual fund purchases at that evening's prices



Trade Settles

Sponsors and Participants will see trades reflected on the BPAS web portal on the following day.

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



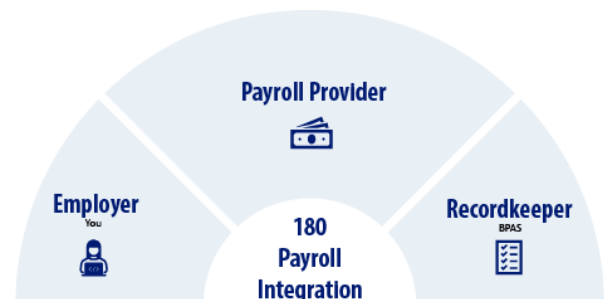
Work with the best in DC plan administration and your choice of payroll providers for highly automated services across the board.

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

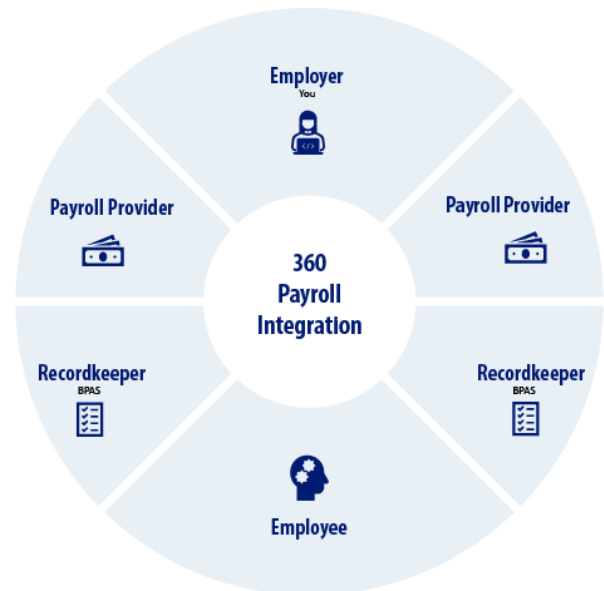
180-Degree Integration

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.**



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



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