



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.



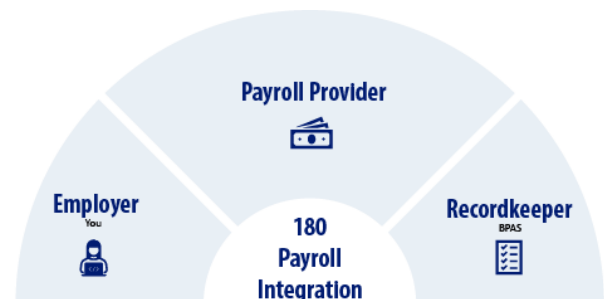
Work with the best in DC plan administration and your choice of payroll providers for highly automated services across the board.

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

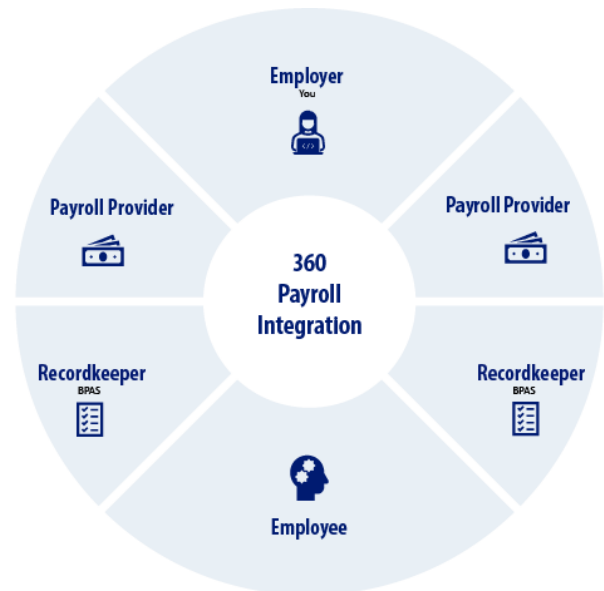
180-Degree Integration

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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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; password is case sensitive.
- Type in username and click on Proceed. Type in Password and click on Sign in.
- You will be asked to choose an Authentication Method. We offer the following options for MFA:
 - **Authentication App:** Use an app like Google Authenticator, Microsoft Authenticator, or Authy.
 - **Email:** Receive a one-time code via email.

Please follow the onscreen instructions. An additional guide called the “CensusPro MFA and Captcha Guide” is available.

Note: you are required to change your password on your first log in. Password changes are required every 90 days.

Password requirements: 8 characters; at least 1 uppercase letter, 1 lowercase letter, 1 number, and one special character: ' ! " \$ % & # () = + / (Please note these characters are deemed unsafe and can cause potential security threats and are blocked and cannot be used < > * % : \ ?)



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 drop-down menu for either **Payroll** (Indicative data with contributions) or **Employee Update** (indicative data only). Now click on **Start Payroll/Employee Update** and follow the process below: (see sample screenshot below)

- Choose a **Payroll/Employee Update Type** 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.)
- For **Payroll Type** you can choose Existing Payroll and any open work orders will show up, or click on Create New to follow the next steps.
- Type in a **Description**, i.e., plan name, pay frequency and date, or anything of your choosing.
- Choose your **payroll frequency** from the drop-down menu.
- Enter **Dates** (Start, End, and Due date) – please enter the check date in all 3 boxes.
- **Funding Method and Bank** options are defaulted, these items are not used via CPro2, our recordkeeping system controls banking or funding information.
- **Do NOT check test mode. Do NOT check Last Payroll Indicator** unless this is your last pay date of the year reporting hours and compensation. **Do NOT check createNewWO.disableNotifications.**
- Click **Create Payroll/Employee Update** – you will be taken to the dashboard showing your work orders. You may also hit NEXT to bring up the next step of loading a file or prepopulating your data rather than hitting Create and then choosing Start or Begin Entry. If you hit next, see below steps.

Payroll Type * : 777711

Create new

Payroll Information

Description * test

Frequency * Biweekly

Start Date * 05/12/2025

End Date * 05/12/2025

Due Date * 05/12/2025

Funding Method * Check

☐ Last Payroll Indicator

☐ Test Mode

☐ createNewWO.disableNotifications


*Indicates required field

[Dashboard](#) [Create Payroll](#) [Next →](#)

At any time during your session, you can use the links of **Advanced Search** (Upper right hand corner of the screen near green bell), **Dashboard** (Left hand side of screen), **Payroll or Employee Update** (select View All in the drop down menu) to see a list of recent work orders for your account. There is also a Quick ID Search feature you can use with your Work Order ID# listed in most screens and notifications.



Icon Guide

To the right of each work order are **Actions Icons** , if you click on the three dots, a menu will appear. The available options will depend on the current status of your work order. Here is a list of the various icon you will see at different stages












View Data



View Details





Begin Entry

-  View Validation History
-  Delete
-  View Notifications
-  Print Invoice
-  Download Original File
-  Download Payroll Adjustment Report
-  View Bank Information
-  Set Last Payroll Indicator
-  Download Data



Data Submission

On the Dashboard or Advanced Search screen, locate the appropriate work order and click on **Start Button** over to the right. You may also click on the **Actions Icon**  on the right side of the screen and click on **Begin Entry**  If you hit next on the previous Create Work Order screen you will already be on the Begin Entry screen.

- **Submission Type** - On the begin entry screen you will choose one of the following processes or you will already be defaulted to one:
 - **Employees on file (Manual Data Entry)** - This process will gather your current employee data from our recordkeeping system and allow you to manually edit and update. This will bring over active employees and terminated employees with a balance.
 - **Hit Next** to start the process of gathering your data. You will see a progress bar.
 - **If errors are found** – hit next to view and correct them.
 - **If no errors are found** – hit next and you will see your employee data. Edit or add all required indicative data and payroll amounts. Once complete, hit **Save** and then **Next**.
 - Review totals and hit **Next**.
 - **File upload** – This process will allow you to upload an electronic file. **In order for a file to be used it must be mapped and tested to the CensusPro2 site.**
 - **Browse** to choose your file from your directory, then hit **NEXT**.
 - You will now have a progress bar. **Please note**, you must work with the census team to set up the system to read your file or if you have made changes.
 - If you received notice of a **loading error**, review the message, correct your file, reset the work order and start over. For assistance please contact the Census Department.
 - **If errors are found** - hit next to view and correct them.
 - **If no errors are found** – you can now hit Next to perform the final steps or you may return to the advanced search screen.

Please note – any process taking over 2 minutes will stop the live processing screen, you will then need to navigate to the advanced search screen or dashboard where your status will be updated when the process is complete.

After completing the steps above, CPro2 will be sending your data over to our record keeping system for review at a plan compliance level. If any errors are found at this level your status will become **BPAS Reviewing**, at this time please log off CensusPro2. A dedicated processing team will review the errors found and work internally to resolve. You will receive an email when the final funding approval step is ready.



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.
- **Loading Error** – there is something wrong with your file and a message was sent to the Census Team. For this status, click on **Reset With Errors**. Depending on the error you will either see what the error was or ETL Execution Error. If you have details you can correct your file, reset the work order and reload the corrected file. When you see ETL Execution Error you will need to contact the census team for assistance. They received a message and will review.
- **Awaiting Light Validations** – the system is reviewing the information for data or formatting issues. Please wait and refresh.
- **Errors Found** – there are data or formatting errors that you need to correct. Click on Next or if you have navigated away from the screen, click on Resume when returning to the site. Click on 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** – 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** – 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.
- **Awaiting Posting** - You have submitted and approved your data, your work is complete. BPAS will post the data once funding is complete. The following day the work order will move to a status of **Completed**.



Funding Approval

After your data has cleared all validation checks you will have a final approval step. Whether you are still logged in and completed this step in a few minutes or had to wait for BPAS to review errors, you will receive an email notice when this step is ready.

- Locate the appropriate work order on the Advanced Search screen, Dashboard or use the Quick ID Search, the work order number will be listed in the email notice. Click on the **Approve Funding** icon or link.
- You should see the **Funding Approval** page at this time – please review the data carefully.
- If you plan allows for Forfeiture use, you will see a line with the available amount to be used, in the text box you can enter the amount you would like to use up to the Max amount.
- If you **agree** with the data, click **Approve** to complete the work order. If you do not agree see the next page.
- Once you click on **Approve**, you'll see a Funding Approval confirmation page. You will have an option to Print an Invoice.
- 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.



Funding Approval – Amounts are not correct

If you **DO NOT agree** with the contribution totals, please click **Cancel** or return to the Advanced Search or Dashboard screen and follow the instructions below for next steps.

Did BPAS Make any Adjustments?

- Click on the View Data button for a read-only version of all your data.
- Choose **Participant Notes** as your Select option, check the option of **Exist** and then click the **Search icon** (magnifying glass). The results will show you anyone that was adjusted.
- Click on the Note icon to see what was adjusted and why.
- If you agree with the changes, click the Advanced Search link at the top of the screen and follow the steps above to approve. If you disagree with the changes please contact your plan consultant to discuss.

Did BPAS Not Make any Adjustments?

- Click on the View Data button for a read-only version of all your data.
- Review your data to find your discrepancy. If you determine the numbers are correct, return to the Advanced Search screen and follow the approval steps.
- If you do find errors that need to be corrected, scroll to the bottom of the screen and hit Enter Data.
- Your data will now be editable, make any corrections needed and hit **Save**.
- When complete, scroll to the bottom of the screen and hit **Next**
- Review your totals and hit **Next**
- Your data will now be run through all validation checks again discussed earlier in this guide.

Questions? We're here to help.

Call the Census team at 315-292-6970 or email census@bpas.com.