


CensusPro® - Adding Employees

The screenshot displays the CensusPro administrative interface. At the top, the 'censusPRO a BPAS Service' logo is visible. Below the logo is a navigation menu with tabs for Dashboard, Plan Configuration, Employees, Contributions, Reports, Tools, Help, and Log Out. The 'Employees' tab is selected, and a dropdown menu is open, showing options: Update Employees, Add/Edit Employees (highlighted), and Delete Employees. A mouse cursor is pointing at the 'Add/Edit Employees' option. To the right of the menu, the user role is 'TPA Administrator' and the current plan is '800014 - AUTOROLLOVERS ...'. Below the navigation, the 'Administrative Dashboard' is shown, with sections for 'Plans and Users' and 'Pay Date Status'. A callout box with a blue border and white background is overlaid on the dashboard, containing the text: 'Step 1: Select "Add/Edit Employees" from the "Employees" drop down menu.'

Step 1: Select "Add/Edit Employees" from the "Employees" drop down menu.



a BPAS Service

Dashboard | Plan Configuration | Employees | Contributions | Reports | Tools | Help | Log Out

Your user role is: **TPA Administrator** Select a plan to edit: 800014 - AUTOROLLOVERS ... ▾

You are viewing plan: **800014** AUTOROLLOVERS Active Terminated All

[Español](#)

Employee Information

Show all employees.
 Show only employees with invalid data.

Quick look-up by SSN

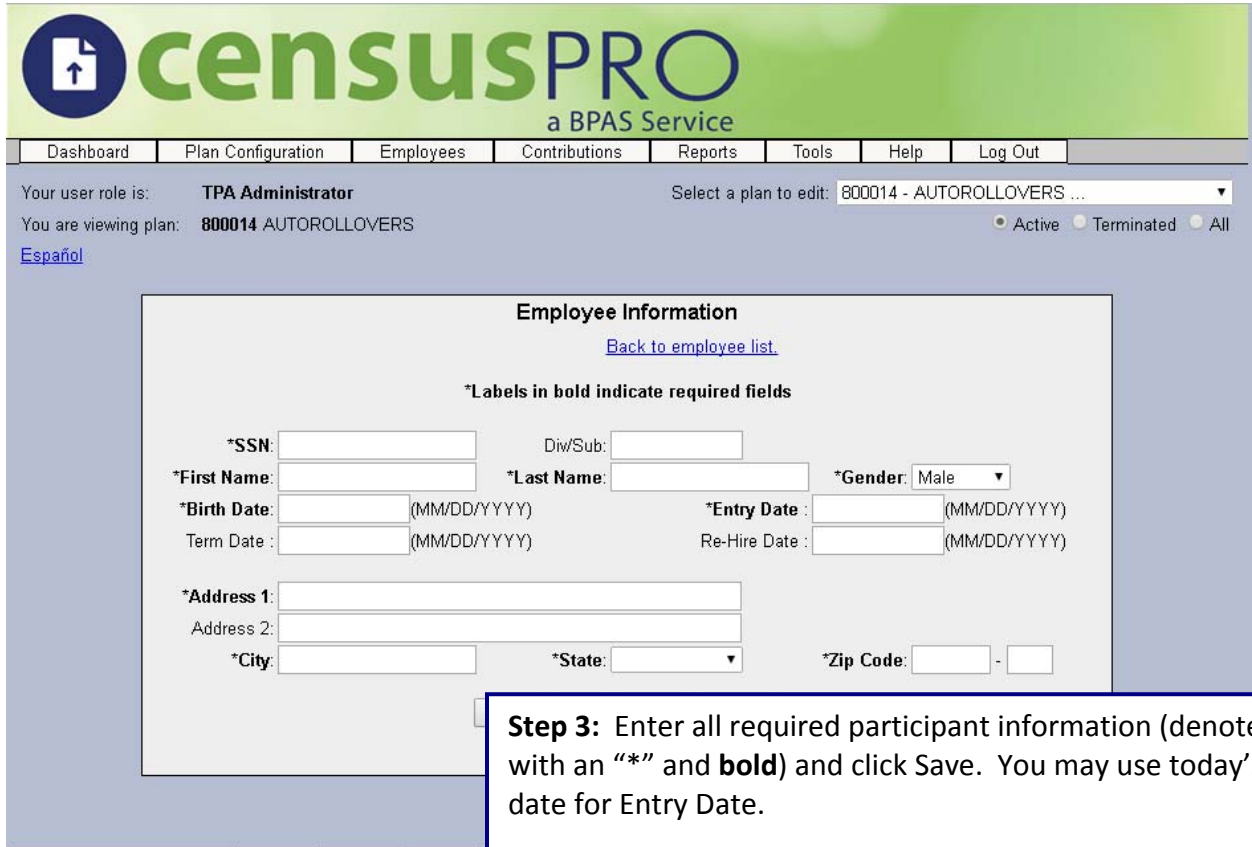
[Click here to view automated QP import history.](#)

SSN	Div/Sub	First Name	Last Name	Details
██████████		██████████	██████████	<input type="button" value="Details"/>
██████████		██████████	██████████	<input type="button" value="Details"/>
██████████		██████████	██████████	<input type="button" value="Details"/>
██████████		██████████	██████████	<input type="button" value="Details"/>

... [301](#) [302](#) [303](#) [304](#) [305](#) [306](#) [307](#) [308](#) [309](#) [310](#) ...

Red rows indicate employees whose information contains invalid data
Yellow rows indicate employees who have loans that contain invalid payment amounts

Step 2: Select "Add".



Employee Information
[Back to employee list.](#)

*Labels in bold indicate required fields

*SSN: Div/Sub:

*First Name: *Last Name: *Gender: Male

*Birth Date: (MM/DD/YYYY) *Entry Date: (MM/DD/YYYY)

Term Date: (MM/DD/YYYY) Re-Hire Date: (MM/DD/YYYY)

*Address 1:

Address 2:

*City: *State: *Zip Code: -

Step 3: Enter all required participant information (denoted with an "*" and **bold**) and click Save. You may use today's date for Entry Date.

Also, Div/Sub may be used if you wish to be able to track participants by Plan or Administrator (contact us at autorollers@bpas.com if you would like to use this feature).


Once all participants have been added, proceed to **Reporting Rollover Amounts**

CensusPro® - Reporting Rollover Amounts

The screenshot shows the CensusPro web application interface. At the top, there is a navigation bar with tabs for Dashboard, Plan Configuration, Employees, Contributions, Reports, Tools, Help, and Log Out. Below the navigation bar, the user's role is identified as 'TPA Administrator' and the plan being viewed is '800014 AUTOROLLOVERS'. A dropdown menu is open under the 'Contributions' tab, listing options: Add Pay Date, Edit Contributions, Submit Pay Date, Reset Pay Date, and Delete Pay Date. The 'Add Pay Date' option is selected, and a dialog box titled 'Add Pay Date' is displayed. The dialog box shows a calendar for October 2017. The date October 31, 2017, is highlighted in yellow, indicating it is the currently selected date. Below the calendar, there is a legend: a green square for 'Data pending', a red square for 'Data submitted', a blue square for 'Data received by BPA', and a yellow square for 'Currently selected date'. The 'Selected date: October 31, 2017' is displayed. At the bottom of the dialog box, there are 'Add' and 'Cancel' buttons.

Step 1: Select "Add Pay Date" from the "Contributions" drop down menu.

Select today's date and click "Add"



Dashboard | Plan Configuration | Employees | Contributions | Reports | Tools | Help | Log Out

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You are viewing plan: **800014** AUTOROLLOVERS Active Terminated All

[Español](#)

Edit Pay Date

[Back to calendar.](#)

Pay Date: 10/31/2017

All Employees Active Employees
 Employees With Errors Employees To Review

Quick look-up by SSN

SSN	Div/Sub	First Name	Last Name	Contributions	Reviewed	Edit
██████████		██████████	██████████	0.00	○	<input type="button" value="Edit"/>
██████████		██████████	██████████	0.00	○	<input type="button" value="Edit"/>
██████████		██████████	██████████	0.00	○	<input type="button" value="Edit"/>

1 2 3 4 5 6 7 8 9 10 ...

✓ Reviewed ○ Not reviewed X Prior year terminated employee (review not required)


Total of all contributions for this pay date: **\$0.00**

Red rows indicate employees with i

Yellow rows indicate employees with i

Step 2: Locate the participant that needs to be reported and select "Edit".

Tip: Be sure to mark "All Employees".



Dashboard | Plan Configuration | Employees | Contributions | Reports | Tools | Help | Log Out

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You are viewing plan: **800014** AUTOROLLOVERS Active Terminated All
[Español](#)

Edit Pay Date

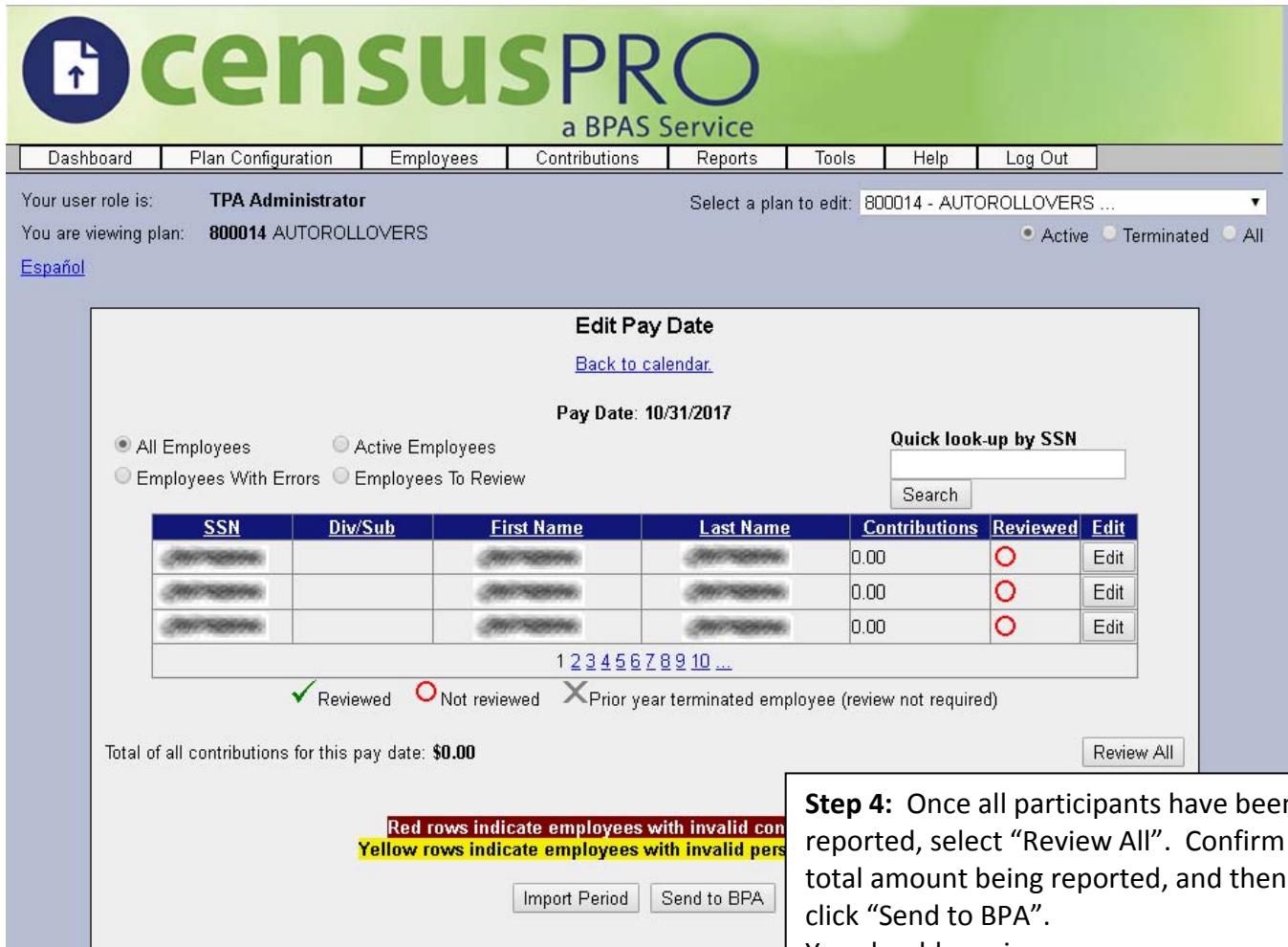
[Back to employee list.](#) [Back to calendar.](#)

Contribution details for: **JOHN DOE**

TRADITIONAL ROLLOVER:

Step 3: Enter the Rollover Amount and click "Save". Repeat steps 2 & 3 for each participant that needs to be reported.

Tip: Use the **Back to employee list** link to find the next participant to report.



Step 4: Once all participants have been reported, select "Review All". Confirm the total amount being reported, and then click "Send to BPA". You should receive on-screen confirmation that your data was successfully sent.

Please send any feedback regarding these instructions to:
autorollers@bpas.com.

PLEASE NOTE:

ACH Transfers will not be accepted and will be returned to the source.