PayrollSync Report

PayrollSync Payroll Set-up Instructions

The instructions below will help you set up an email notification to be sent when the report is ready to be viewed.

1. Log in to your plan website and select **Run a New Report** from the home page.
2. Scroll through the reports and click **PayrollSync**.
3. Make the following selections under the **Schedule it** tab.
   - **Frequency:** Choose the frequency that matches your payroll cycle.
   - **End Date:** Select an end date that corresponds with your payroll cycle by clicking the drop down menu. You will want to pick an end date that will allow you enough time to review the PayrollSync report and make any applicable payroll updates. The next two report date ranges will appear below the End Date field.
   - **Begin Date:** This date will auto populate to match with the report frequency. The report will include any data changes between the beginning and ending dates.
   - **Format:** Select your preferred download format for the report.
   - **Notify Me:** Leave the **Yes** button checked for an email to be sent each time the report is generated.
   - **Email Address:** Select the email address from the drop down of authorized users who should receive the notification.
4. Click **Submit** to save your settings.

Once you set a schedule, the report will appear in the **Recent Reports** section of the Reports menu.

*Important Note: Remember to track when a participant's hardship suspension will end as PayrollSync does not systematically track this information.