Report Blueprints

PAYROLL

How to Create Popular HRPyramid
Tax Reports in Report Center

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Create Your Favorite HRPyramid Reports in Report Center with Step-by-Step Blueprints

Following the sunset of HRPyramid on June 30, 2023, it's important to us that you have access to the reports you need in Report Center. Our Report Center experts put together a series of do-it-yourself *Report Blueprints* to make it easy for you to create your favorite and most-used HRPyramid reports in Report Center.

In this guide you'll find *Blueprints* **for the top Payroll reports in HRPyramid:**

- Payroll Deduction Summary Within Pay Dates Report
- 401(k) Employee Contribution & Employer Match Register Report
- Workers' Compensation Reporting > By Company/EE ID/Class Code/Rate (Diff) Report
- Insurance Census Report by Company
- Voucher Benefit Audit by Employee Report
- Workers' Compensation Reporting > By Company/Class Code/Rate Report

Find more Report Blueprints in the HRP Sunset section of the Customer Resource Center.

Need help creating these reports?

PrismHR Professional Services can do it for you!

Sometimes it's easier (and faster) to let the pros do it for you. Whether you need one report or many— our team of experts is here to help.

Reach out to your Customer Success Manager to learn more about our Report Building options which can be tailored to exactly what you need.

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Payroll Deduction Summary Within Pay Dates Report

HRP Menu Path: Operations Management > Report > Payroll Reports > Payroll Deduction Reports > Payroll Deduction Summary Within Pay Dates Report

Process ID: OM.DED.SUM.RPT.ENTRY

Starting Report in Report Center: Employee Deductions

Columns

HRP COLUMNS	REPORT CENTER COLUMNS
Deduction Code	Deduction Code
Deduction	Deduction Description
Deduction Amount	Deduction Amount

Aggregations
- Deduction Amount - Sum

Groupings
- Deduction Code
- Deduction Description

Filters
- None

Summary Mode
Yes

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401(k) Employee Contribution & Employer Match Register Report

HRP Menu Path: Operations Management > Report > Benefit Reports > 401(k) Reports

Starting Report in Report Center: Report Parameters

Columns

HRP COLUMNS	REPORT CENTER COLUMNS
Company Name	Client Name
ID	Client ID
Employee	Employee Name
Qualified Earnings	Retirement Earnings
Hours Worked	Hours Worked
Pre - Tax	Retirement Pre-Tax Amount
Catchup Contrib	Retirement Catch Up Amount
Roth	Retirement Roth Amount
Catchup Contrib	Retirement Roth Catch Up Amount
Post - Tax Contrib	Post Tax
Loan Payment	Retirement Loan
Employer Match	Retirement Match
Non-Elect Match	Retirement Match Non Elective
Safe Harbor (1) Match	Retirement Match Safe Harbor 1
Safe Harbor (2) Match	Retirement Match Safe Harbor 2
Employee Total	Total Retirement

Fields of Note Not Available on HRP Report

- Client Fields
  - Client Legal Name
  - Client Employer
  - Client Federal Tax ID

- Employee Fields
  - First and Last Name Separated
  - Employee SSN
  - Deferral Percent
  - Match Percent

- Employee Address
- EE Highly Comp'd

- EE Officer

- Other Fields
  - Total Retirement Deferrals
  - Total Retirement Match
  - Employer ID
  - Employer Name
  - Retirement TPA Plan ID

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Aggregations
- Hours Worked
- Retirement Match Safe Harbor 1
- Retirement Match Safe Harbor 2

Groupings
- Client Name
- Client ID
- EE ID
- Employee Name

Filters
- Retirement Plan
- Insurance Class
- Employer
- Client
- Employee

Summary Mode
No

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Workers' Compensation Reporting > By Company/EE ID/Class Code/Rate (Diff) Report

HRP Menu Path: Operations Management > Report > Workers Compensation Reports > Workers Compensation Reporting > By Company/EE ID/Class Code/Rate (Diff) Report

Starting Report in Report Center: Workers' Comp Liability

Columns

HRP COLUMNS	REPORT CENTER COLUMNS
Client ID	Client ID
Client Name	Client Name
Client Address	Client Address
Client City	Client City
Client State	Client State
Client Zip Code	Client Zip Code
EE ID	EE ID
Employee Name	Employee Name
St. Class	EE Status Code
EE Type Code	EE Type Code
WC Class Code	WC Class Code
Rate Disc	WC Gross Rate
Mod	WC Accrual Modifier
Total Hours	WC Hours Worked
WC Basis	WC Basis Pay
WC AdjPay	WC Taxable Pay
Calc Prem	Calc Premium
TRIA Amt	WC TRIA Amount
ACCTACCRL	WC Accrual Amount (Voucher)

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Aggregations
- WC Hours Worked - Sum
- WC Basis Pay - Sum
- WC Taxable Pay - Sum
- Calc Premium - Sum
- WC TRIA Amount - Sum
- WC Accrual Amount (Voucher) - Sum

Groupings
- Client ID

Filters
- Check Status = Void

Summary Mode
No

Insurance Census Report by Company

HRP Menu Path: Operations Management > Report > Benefits Reports > Benefit Census Reports > Insurance Census By Company Report

Process ID: B:EXEC.CENSUS.RPT,G

Starting Report in Report Center: Insurance Census by Date

No changes are needed to the Report Center version of this report to replicate.

Voucher Benefit Audit by Employee Report

HRP Menu Path: Operations Management > Report > Benefit Reports > Benefit Billing Reports > Voucher Benefit Billing Reports

Starting Report in Report Center: Benefit Billing Detail

Columns

HRP COLUMNS	REPORT CENTER COLUMNS
Co ID	Client ID
ER ID	Employer ID
Company Name	Client Name
EE ID	EE ID
Employee Name	Employee Name
Plan Code	Plan ID
Plan Description	Plan Descriptions
Pay Date	Pay Date
Period	Coverage Period
Voucher #	Voucher Number
Premium	Premium Cost
Premium Collected	Benefit Adjustment Reference Number
Client Amount Billed	Billed Amount
Employee Amount Deduction	EE Deduction Amount
Not on Report	Net Billed Amount

Aggregations
- Premium Cost

Groupings
- As Needed

Filters
- Plan ID (Optional)
- Insurance Class (Optional)

Summary Mode
Yes

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Workers' Compensation Reporting > By Company/Class Code/Rate Report

HRP Menu Path: Operations Management > Report > Workers Compensation Reports > Workers Compensation Reporting > By Company/Class Code/Rate Report

Starting Report in Report Center: Workers' Comp Liability

Columns

HRP COLUMNS	REPORT CENTER COLUMNS
Company ID	Client ID
Company Name	Client Name
ST.Class	WC Class Code
Rate	WC Gross Rate
Mod	WC Accrual Modifier (Voucher)
Total Hours	WC Hours Worked
Total Pay	Currently not available (May release)
WC Basis	WC Basis Pay
WC ADJPAY	WC Taxable Pay
Calc Premium	Calc Premium
TRIA Amount	TRIA Amt
WC Amount	WC Accrual Amount (Voucher)

Aggregations
- WC Hours Worked - Sum
- WC Basis Pay - Sum
- WC Taxable Pay - Sum
- Calc Premium - Sum
- WC TRIA Amount - Sum
- WC Accrual Amount (Voucher) - Sum

Groupings
- Client ID
- WC Class Code

Filters
- None

Summary Mode
No

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