ABOUT THIS GUIDE

Use these resources in conjunction with the Paychex Online Payroll Training site, which is available when you log in to www.paychexonline.com. Select the Payroll service icon and click Learn More from the bottom of the screen.

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Customizing Your Payroll - Check out how to use application Preferences to customize the Payroll Entry screens to match how you normally record and enter your payroll in Online Payroll.

Creating Additional Checks - Learn how to use the Add a Check Option in Payroll Entry to create additional checks for your employees. This may include checks you wrote in-house or using the Gross to Net or Net to Gross options to calculate a hypothetical check.

Using the Edit Option - Use the Edit option to make one-time only changes to an employee's check during Payroll Entry. This includes one-time changes to earnings, deductions, and withholdings.

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Distributing Hours and Earnings in Pay Entry - Find out how to use Multiple and Individual Pay View to distribute an employee's hours or earnings to different organization units or departments.

Getting Started with Online Reports - Learn how to view and download payroll reports, tax returns, and invoices with the Paychex Online Reports product.

Managing Employee Access - Learn how to use the Manage Employee Access Online screen from the People services icon in www.paychexonline.com to control employee access to personal and payroll information, check stubs, and copies of Forms W-2.
OTHER ONLINE PAYROLL TRAINING

Tutorials (1)
Each training topic will walk you through a different area of the application. There is also a 20-minute recorded training session, which gives an overview of the application.

Resources (2)
Refer to the Resources section to view the individual documents in this guide.

Release Notes (3)
Refer to the Release Notes section for more information on updates or enhancements to the application.

Live Training Sessions (4)
If you would like additional training, register for a live Online Payroll WebEx® session facilitated by a Paychex trainer.
Getting Started with Paychex Online Payroll

Prepare Payroll and Login

Before you begin payroll, make sure to do the following:

1. Contact your Paychex representative with any company maintenance changes. Company bank changes must be reported to Paychex at least 2 business days before your payroll reporting date.

2. Verify your payroll processing date, especially when there is a holiday.

Next, log in to the application:

2. Enter your Paychex Online username and password (1) and click Log-In.
3. Enter your PIN and click the Payroll service icon. (2)
4. Enter new employee and contractor information or employee changes.

Begin New Payroll

1. Select Payroll and select Multiple or Individual Pay View to enter payroll. (3) You can also take a shortcut and click Automatically Create and Review Payroll to pay all your employees with standard hours and salaries. Standard hours, rates, and salaries must be preloaded in Employee Maintenance.

2. The check date defaults to your next regularly scheduled pay period. Begin entering payroll or select another check date.

Enter Payroll in Multiple Pay View

1. Select the checkbox (4) to create a check for the employee. You can also click All to pay all workers in the Multiple Pay View screen, instead of checking each individual employee.

2. Enter the employee’s hours or pay amounts.

Use the following features as needed:

- Click Edit (5) or use Individual Pay View to make one-time overrides to a check’s earnings, deductions, or withholdings.

- Click Add a Check (6) to enter a regular, manual, or calculate a gross-to-net or net-to-gross check.

- Click Void a Check (7) to void a previously issued check.
Review and Submit Payroll

Once you finish entering your payroll, click **Review Payroll**. (1)

Confirm your payroll by reviewing the check and payroll totals for your hours and earnings. To calculate and view the complete payroll, click **Payroll Journal**. Click **Cash Requirements** to determine your cash required for the payroll.

3. Click **Submit Payroll** (3) to release your payroll to Paychex for processing.

Normally, your payroll will process within an hour after submitting it to Paychex. If you use Online Reports, Paychex will email you and post a message on your personal Message Center when your payroll is done processing.

From the Message Board, select the Reporting service icon to view or print your reports.

For more information about how to use Online Payroll, click Learn More from the bottom of any Online Payroll screen. You will have access to:

- an in-depth tutorial on the application and functionality
- printable job aids for the most common tasks
- a recorded WebEx session, and
- sign up for a live training session with a Paychex representative.
Payroll in 4 Easy Steps

Learn the basics of completing your payroll in 4 easy steps.

Step 1: Prepare Payroll

Entering payroll and employee changes ahead of time saves you time on your payroll reporting date.

Before you begin payroll, make sure to do the following:

1. Enter new employee and contractor information.
   - **Note:** Paychex HR Solutions - Professional Employer Organization (PEO) clients cannot add or maintain contractors.

2. Enter employee changes, such as rate, address, or bank account changes.

3. Have your completed time cards or timesheet available.

4. Contact your Paychex representative with any company maintenance changes.

5. Verify your payroll processing date, especially when there is a holiday.

Refer to the Links of Interests to access payroll resources and learn more about other Paychex products and services. (1)

- **Company bank changes must be reported to Paychex at least 2 business days before your payroll reporting date.**

- **If there is a bank holiday, you may need to adjust your payroll reporting date or your check date to ensure timely processing.**
Step 2: Begin New Payroll

1. If needed, maximize the workspace on your screen:
   • change your monitor resolution (recommended resolution setting is 1280 x 1024), or
   • maximize the window or resize the window as needed.
2. Click Start Payroll and select Multiple or Individual Pay View to enter payroll. (1)
3. The check date defaults to your next regularly scheduled pay period (2). Begin entering payroll or select another check date.

Click Preferences to customize your payroll entering experience, including the columns that you want to display in the payroll entry grid. You can find out more information about this feature in the Customizing Your Payroll job aid located in the tutorial.

Take a shortcut and click Automatically Create and Review Payroll to pay all your employees with standard hours and salaries. Standard hours, rates, and salaries must be preloaded in Employee Maintenance.

To create additional workspace on your screen, click ← to hide the left navigation menu or ⇪ to hide the employee information panel at the bottom of the screen. (3)
Step 3: Enter Payroll

Use this process to pay your employees using Multiple Pay View:

1. Select the checkbox to create a check for the employee. You can also click All (1) to pay all workers in the payroll entry grid, instead of checking each individual employee.
2. Enter the employee’s hours or pay amounts.
3. Click Edit (2) to make one-time overrides to a check’s earnings, deductions, or withholdings.
4. Click Add a Check (3) to enter a regular or manual check, calculate a gross-to-net or net-to-gross check, or add a check using a check template. Click Void a Check (4) to void a previously issued check.

Use Individual Pay View to see additional check details for each employee.

Make changes to a check’s earnings, deductions, or withholdings (6) directly from the Individual Pay View screen.
Step 4: Review and Submit Payroll

1. Once you finish entering your payroll on the Multiple or Individual Pay View screen, click **Review Payroll.** (1)

   Confirm your payroll by reviewing the check and payroll totals for your hours and earnings. To calculate and view the complete payroll, click **Payroll Journal.** Click **Cash Requirements** to determine your cash required for the payroll. (2)

2. Click **Submit Payroll** to release your payroll to Paychex for processing. (3)

   *Only the Payroll Journal (4) is available for Paychex HR Solutions- Professional Employer Organization (PEO) clients. Review the invoice through Online Reports for the total cash required for the payroll.*

*Your payroll calculates when you select the Payroll Journal or Cash Requirements or click **Submit Payroll.** You will may experience a slight delay while the application calculates your payroll.*

*If you have any payroll changes, click on an employee or click **Edit Payroll.** Make the changes and click **Review Payroll** to review the updated information.*
Normally, your payroll will process within an hour after submitting it to Paychex. If you use Online Reports, Paychex will e-mail you and post a message on your personal Message Board when your payroll reports are ready. (1)

You can set up your report favorites so that the most current payroll reports display in the Report Favorites (2) section. Click the Reporting service icon to access the Online Reports application.

There are situations in which your payroll processing may be delayed. Please refer to the Message Board to determine when your payroll is done processing.

Paychex will deliver your payroll package according to your chosen delivery method.

Please refer to the Message Board for information about regularly scheduled maintenance that may affect your payroll processing times and additional communication from Paychex regarding your payroll account.
Contacting Paychex for Company Changes

Company maintenance changes can only be made by your Paychex representative. Contact your local representative before reporting payroll when you need to update your account.

Common Maintenance Changes

Contact your Paychex representative to:

- add a new earning or deduction to your account
- change any of your company's standard information, such as legal or business name, address, phone number or payroll contact information.
- modify the organization structure (add or remove departments)
- add a new Check Template to use during payroll
- add a check stub message for an individual employee or all employees, or
- subscribe to additional Paychex reports or services.

Special Checks

Contact Paychex to issue checks for disability payments or vendors.

DISABILITY PAYMENTS
Disability payments are generally any amount paid under a plan to your employee for a temporary absence from work due to injury, sickness, or disability. Short- and long-term disability payments are often paid by a third party, such as an insurance company, but must be reported to Paychex for tax purposes.

VENDOR CHECKS
Paychex can issue company payments to third-party vendors, for anything from recurring electric or phone bills to one-time retirement or health insurance payments. To set this up, provide your Paychex representative with the vendor information and report the payment amount before entering your payroll. A check for this amount will be issued and sent to you to sign and remit to the vendor.
Company Bank Account Changes

Company bank account changes must be submitted to your Paychex representative at least 2 business days before your check date.

Adding Tax Regulations

You must contact your Paychex representative to add or modify any state or local income tax or state unemployment insurance regulations.

Changes for PEO Clients

In addition to these changes, Paychex HR Solutions - Professional Employer Organization (PEO) clients may also need to contact their Paychex representative to:

- modify the employment status for any employee with a status of “transferred”
- change an employee to “exempt” for any withholding taxes
- add or modify certain Paychex-administered earnings and deductions, and
- report a check written in house.

If you use our Taxpay® service, additional setup time is needed to enable Paychex to collect and remit tax payments for the new tax regulations. Contact your Paychex representative with these types of changes before your next payroll processing date.
How to Contact Paychex

Click Need Assistance? in the top-right corner of your screen to access Online Help in the application or to contact Paychex directly. (1)

For questions on how to use the application or technical issues, please contact your local Paychex representative via phone.
Customizing Your Payroll

The Preferences menu allows you to customize the way you enter payroll. From the top task menu, select Preferences. (1) You can also access Preferences from the home screen.

Automatic Pay

The Automatic Pay payroll entry method creates a check for all employees and contractors with salaries or standard hours. You can control the workers who are paid with this feature. For example, if you want to just pay all salaried employees and manually enter hourly information, make that selection here. (2)

When you use Automatic Pay, you will bypass the payroll entry screen and go directly to the Review Payroll step to verify your check and payroll totals.

Paychex HR Solutions - Professional Employer Organization (PEO) clients cannot add or maintain contractors. The contractor options will not be available in the Automatic Pay preferences screen.
Payroll Entry Sort Order

This preference allows you to determine the order in which your employees and contractors display on the payroll entry screen. You can sort employees alphabetically by organization (department), last name, or employee number.

The sort order you select applies to both Multiple and Individual Pay View.

The preference you select here, will also control how your employees display in the Check Totals section of the Review Payroll screen.
Customize Payroll Entry Columns

You can select up to eight earnings and deductions to display on your Multiple Pay View screen. Use this preference to add, delete, or sort the most common earnings and deductions you will use to report payroll each week.

SORT COLUMNS

Your payroll entry columns display in the Selected Earnings and Deductions section (1) labeled with a for earnings and a for deductions. To change the order of these columns, click on an earning or deduction box, drag it to where you want it, and drop it in place.

From the Multiple Pay View screen, you can also click Edit to access all earnings and deductions available on your account. You can also use Individual Pay View to enter any additional earnings or deductions for the current pay period.

In this example, the last column, Regular Rate, will be placed before the Bonus Amount column. (2)
ADD COLUMNS

You can display up to eight columns in your Multiple Pay View screen. These eight columns should represent the most common earnings and deductions you use when entering your payroll.

To add a column, select the item from the Available Earnings or Deduction section at the bottom of the screen, drag it up to the Selected Earnings and Deductions section, and drop it in place.

DELETE COLUMNS

You can also remove an earning or deduction from the Multiple Pay View screen. Click on the item in the Selected Earnings and Deductions section, drag it to either the Available Earnings or Available Deductions section, and drop it in place.
IMPORT FILE SETUP

This preference allows you to identify the data included in your ASCII file. Before you import your first ASCII file:

1. Select the File Format of the ASCII file. (1)
   Choose:
   - Comma Delimited – Unquoted Strings
   - Comma Delimited – Quoted Strings, or
   - Fixed Length.
2. Enter the number of header records. (2)
3. Enter the number of trailer records. (3)
4. Select the fields to include in the file. (4)
5. Select the order of the fields. Enter the default rate for each hours earnings, if desired. (5)

   Note: You can import the rate along with the hours with your selection. A rate in your import file overrides the rate selected on this screen.
6. Save your preferences.

If you change your ASCII file in the future, you must update this screen to match it.
Creating Additional Checks

You can add four types of regular employee checks from the Multiple or Individual Pay View screens.

ADD A REGULAR CHECK

Select this option to add an additional check, such as a separate commission check, for an employee. The check will be taxed based on the employee’s normal pay frequency and withholding information.

1. From your pay entry view, select the employee for whom you want to add a check.
2. Click Add a Check (1) to open the drop-down menu.
3. Select Regular Checks | Add a Regular Check.
4. Enter the hours or amounts for the check.
5. Click Edit to check the Deductions and Withholdings screens for any recurring amounts you want to block or change.
ADD A MANUAL CHECK

Select this option to add amounts from a manually written check to the employee's year-to-date totals or to produce a check with pre-determined amounts. You need to enter specific earning, deduction, withholding, and net pay amounts.

1. Select the employee and click Add a Check | Regular Checks | Add a Manual Check. (1)
2. Enter the Net Pay amount. (2)
3. Click Add an Earning (3) and select the earning type from the drop-down menu. Enter the hours or amounts.
4. Click Deductions (4) at the top of the page to add, change or block deductions amounts, if necessary.
5. Click Withholdings (5) at the top of the page and enter the withholding amounts for each tax deducted from the check.
6. Click Calculate and review the check.
7. Select the check output (6) and click Apply to Pay Period. (7)

The Add a Manual Check option is not available for Paychex HR Solutions - Professional Employer Organization (PEO) clients. Contact your Paychex representative to report checks written in house.

You can enter the net pay on the Earnings, Deductions, or Withholdings screens.

When you click Calculate, the application checks the figures you entered to ensure the earnings minus the deductions and withholding amounts are equal to the net pay amount.
CALCULATE GROSS TO NET

Select this option to calculate the net amount of a check when you know the gross amount. You can use this option to answer what-if questions or to find out how much to pay an employee outside of your regularly scheduled payroll.

1. Select the employee and click Add a Check | Regular Checks | Calculate Gross to Net. (1)

2. Click Add an Earning and select the earning type from the drop-down menu. Enter the hours or amounts.

3. Click Deductions at the top of the page to enter or block deductions on the check.

4. Click Withholdings at the top of the page to make changes to the withholding instructions.

5. Click Calculate (2) and verify the check calculation.

6. Select the output for the check (3) and click Apply to Pay Period. (4)

The employee’s recurring deductions are included in the calculation unless you block them.

The withholdings are based on the employee’s normal withholding instructions, unless changed.
CALCULATE NET TO GROSS

This option allows you to calculate a gross pay when you have the net pay amount. Use this option to find out the gross amount of a check when you have a specific net amount.

1. Select the employee and click Add a Check | Regular Checks | Calculate Net to Gross. (1)

2. Enter the net pay amount (2) and select the earning type (3) the gross will be applied to.

3. Click Deductions at the top of the page to enter or block deductions on the check.

4. Click Withholdings to make changes to the withholding instructions.

5. Click Calculate and verify the check calculation.

6. Select the output for the check (4) and click Apply to Pay Period. (5)

The employee’s recurring deductions are included in the calculation unless you block them.

The withholdings are based on the employee’s normal withholding instructions, unless changed.
Using the Edit Option

To make one-time earning, deduction, or withholding changes for an employee’s check while in payroll entry, click the Edit button. You can also select the direct deposit icon to block direct deposit. Any changes you make will be for the current check only.

ACCESS THROUGH MULTIPLE PAY VIEW

1. Click Edit. (1)

2. In the Edit Check screen, select Earnings, Deductions, or Withholdings. (2)

ACCESS THROUGH INDIVIDUAL PAY VIEW

1. From the Individual Pay View screen, select Earnings, Deductions, or Withholdings. (3)
EDITING EARNINGS

The Earnings screen is used to add one-time additional earnings for a single check. Permanent changes must be made in Employee Maintenance. You can make changes directly in the Multiple (if the earning displays in your grid) or Individual Pay View screens, or you can click the Earnings button.

Adding a One-time earning

1. Click **Add an Earning.**
2. Select the earning you need from the Description drop-down menu.
3. Enter the earning amount in the Amount field.
4. Click **Apply to Check** to save your changes and return to the regular payroll entry screens.

Stopping a Recurring Earning on a Single Check

1. Select the **Block** checkbox for the earning.
2. Click **Apply to Check** to save your changes and return to the regular payroll entry screens.

Learn more about how to customize the payroll entry columns from the Customizing Your Payroll job aid, located in the Resources section of the Paychex Online Payroll® Training site.
EDITING DEDUCTIONS

The Deduction screen is used to make one-time changes to deductions for a single check. Permanent changes must be made in Employee Maintenance.

Changing a Deduction

1. To edit the amount of the deduction, click in the **Amount** field. (1)
2. Enter the one-time amount.
3. Click **Apply to Check** (2) to save your changes and return to the regular payroll entry screens.

Adding a One-time Deduction

1. Click **Add a Deduction**.
2. Select the deduction you need from the Description drop-down menu. (3)
3. Enter the amount in the Amount field.
4. Click **Apply to Check** to save your changes and return to the regular payroll entry screens.

Stopping a Recurring Deduction on a Single Check

1. Select the **Block** (4) checkbox for the deduction.
2. Click **Apply to Check** to save your changes and return to the regular payroll entry screens.

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Contact your Paychex representative to add a new deduction to your account.

Learn more about how to customize the payroll entry columns from the Customizing Your Payroll job aid, located in the Resources section of the Paychex Online Payroll® Training site.

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EDITING WITHHOLDINGS

The Withholdings screen is used to make one-time changes to tax withholdings for a single check. Permanent changes must be made in Employee Maintenance.

You have several options for making one-time changes to an employee’s federal, state, or local income tax withholding on a check. You can change the tax frequency (1), method, amount, percentage, additional amount, or you can block (2) the tax completely for the pay period.

Some withholding override options are not available for Paychex HR Solutions - Professional Employer Organization (PEO) clients.
BLOCKING DIRECT DEPOSIT

Use this feature to make one-time changes to direct deposit settings for a single check. Permanent changes must be made in Employee Maintenance.

1. Click .
2. Select the appropriate direct deposit option:
   - **Block Direct Deposit for all Net Pay** blocks all direct deposit accounts set up on the employee's Salary and Bank Information screen.
   - **Unblock Direct Deposit for all Net Pay** unblocks direct deposit for all accounts set up in the employee's Salary and Bank Information screen.
   - **Change Direct Deposit Allocation** allows you to block a single account when the employee has multiple direct deposit accounts.

From the Override Direct Deposit screen, click **Apply to Check** to save your changes and return to the regular payroll entry screens.

When direct deposit is blocked, the icon changes to .

When part of the direct deposit is blocked, the icon changes to .
Using Check Templates

Check templates assist you when creating checks that have specific earning, deduction, and withholding settings.

For example, every month you pay a separate bonus check to each employee and withhold FICA taxes only. Check templates enable you to withhold FICA on the bonus check and automatically block other earnings, deductions, and withholdings.

To create a check using this feature, click **Add a Check | Template Checks**. (1)

**Not all check templates shown in this training are available for Paychex Hr Solutions - Professional Employer Organization (PEO) clients**

If you normally use Multiple Pay View to enter your payroll, click **Preferences | Customize Payroll Entry Columns** to add a Bonus Amount column (2) to the screen.

You can also use Check Templates from the Individual Pay View screen.
TEMPLATE TYPES

Each check template creates a separate bonus check for the employee. All recurring earnings and deductions, except employee retirement contributions, are blocked. Based on the bonus template you select, the following taxes are withheld:

- **Add a Bonus - FICA only Check** — Only social security and Medicare are withheld from the check.

- **Add a Bonus - Suppl Taxes Withheld Check** — Federal income tax is withheld at the supplemental rate (which is currently 25%). Regular state and local income taxes are withheld, except where a supplemental rate is required. State disability taxes, such as NY and HI, are blocked.

- **Add a Bonus Standard Taxes Withheld Check** — Regular taxes are withheld based on the employee’s pay frequency, marital status, and exemptions.

- **Add a Supplemental Pay Check** — This template calculates the same taxes as the Suppl Taxes Withheld template, but state disability taxes, such as NY and HI, are withheld.

When you use the Supplemental Pay Check template, the employee’s recurring garnishment or garnishment fee is blocked; the other templates will withhold garnishment deductions.

If needed, you can modify a check created with a check template. From the Multiple Pay View screen, select the check and click **Edit**.

If you use the Paychex Time Off Accrual product, the three “Add a Bonus” check templates will calculate accruals if the information entered on the template is part of your Time Off Accrual calculation base.

If you want to see how a template will affect a check, click **Payroll Journal** from the Review Payroll screen to display the check.
APPLYING A TEMPLATE TO UNPAID CHECKS

In Multiple Pay View, you also have the option to apply a check template to any unpaid checks for that pay period. You can easily issue multiple checks with the same taxability, such as a bonus or a commission payroll.

From the top of the Multiple Pay View screen, click **Options | Default Unpaid Checks** and select a check template. (1)

If you use this feature and navigate to another screen, you will have to reselect the template to use it for any additional unpaid checks.

CUSTOM TEMPLATES

If you regularly issue checks that have attributes different from the check templates available in Online Payroll, contact your local Paychex representative to create a custom check template. (2)
ADDING A NEW PAY PERIOD

Bonus or supplemental checks are common at year-end. If you need these types of checks dated differently than your standard pay-period checks, or if the checks should display on separate reports, you must add a new pay period in Online Payroll.

1. From the Multiple or Individual Pay View screen, click Add a Payroll. (1)
2. Enter the bonus pay period information and click Save & Close. (2)
3. The Check Date list displays the new pay period. (3)

OTHER BONUS OR SUPPLEMENTAL CHECK CONSIDERATIONS

If you plan to issue bonus or supplemental checks in Online Payroll, consider these questions before entering the checks:

- How will the checks be taxed?
- Which recurring earnings or deductions do you want on the check?
- Should the check be negotiable?
- Do you need to calculate the gross or net amounts first?
- If processing with regular payroll, should the amounts be on separate checks?
- Can your Paychex representative, set up a custom check template that will fit your needs?

Once a bonus check processes, the year-to-date amount on future check stubs will include the bonus amount.

Contact your Paychex representative for additional assistance, if needed.
Distributing Hours and Earnings in Payroll Entry

You can use Multiple or Individual Pay View to distribute an employee’s hours or earnings to different organization units or departments.

### Using Individual or Multiple Pay View

If you regularly distribute hours or earnings for multiple employees, Individual Pay View allows easier access to the Earnings screen (1) to add earnings and enter organization units.

You may also distribute hours or earnings in Multiple Pay View. From the Multiple Pay View screen, select the employee and click Edit. (2) The Edit Check screen displays, and you can enter distributions on the Earnings screen. (3)

The Earnings screen of Individual Pay View and the Edit Check screen of Multiple Pay View function the same way; decide which method works best.

Contact your Paychex representative to set up or change the organizational structure to your account.
Entering Distributed Hours or Earnings

1. From the Earnings screen, click **Add an Earning**. (1)

2. From the Description drop-down menu (2), select the earning type.

3. Enter the hours, rate, or flat dollar amount.

4. From the Organization column (3), select the organization or department to which you will distribute the hours or earnings.

Only organization units set up at the company level display in the drop-down menu. Contact your Paychex representative to add, delete, or change your organization structure.

You can also use this functionality with independent contractors and 1099-MISC compensation.

All hours and earnings automatically default to the employee’s home organization, which displays in the employee information panel at the bottom of the screen. (4)

If the Organization column is blank, the hours or amounts in that earnings row default to the home organization.
Editing Distributed Hours or Earnings

In Multiple Pay View, only the first entry displays if you have multiple distributions for an employee's hours or earnings. To edit all hours or earnings, click **Edit** (1) and make updates from the Edit Check screen. Click **Apply to Check** (2) when complete.

In Individual Pay View, all entries for the employee's hours and earnings display on the Earnings screen. (3) Edit as needed and click **Save**. (4)
Getting Started with Online Reports

Online Reports gives you easy access to payroll reports, tax returns, and invoices on your personal computer at any time. Reports can be viewed and downloaded (saved) to your PC.

**Important Reminder:** Paychex Online Reports is compatible with Adobe® Flash® Player version 10.1 or higher. If needed, download the latest version at http://get.adobe.com/flashplayer.

**Logging in**

Follow these steps to log in to Online Reports:

2. Enter your Paychex Online username and password (1) and click Log-In.
3. Enter your PIN and click the Reporting service icon. (2)

**Options to Get Your Reports**

All online reports are organized to help you find what you are looking for quickly and easily. Drag and drop the filing cabinet icons (3) on the home page of the application to wherever is convenient for you.

**MY FAVORITES**

Use My Favorites to quickly view or download reports you use often. Report categories are Pay Period, Quarterly, Annual, and Invoice. My Favorites also display on the Company Desktop.

Paychex Professional Employer Organization (PEO) clients: Reports displayed in this job aid may not display for you; reports display based on the services you subscribe to.
PAYROLL FILING CABINETS

From the home page, use the filing cabinets to view or download your payroll, quarterly, annual, or invoice reports.

For example, to view or download (save) the most recent payroll reports package:

1. From the home screen, select the **Pay Period** filing cabinet.
2. Select the check date folder for the payroll package.
3. Choose how you want to access reports:
   - Click **Browse Folder** to display the contents of the package in the table.
   - Click **View Folder** to open a PDF of the selected reports. Save or print the file as needed.

ON-DEMAND REPORTS

The On-Demand Reports filing cabinet allows you to create custom, point-in-time reports based on the most up-to-date payroll data. This feature includes Employee Earnings Records and if you subscribe to the General Ledger Reporting Service, General Ledger reports.

Additional Resources

From the home screen, click **Help** or the **Learn More** from the bottom of the screen to learn how to use and customize Online Reports to your specifications.
Managing Employee Access

Employee Access Online is a suite of products that enables employees to access their personal and payroll information, check stubs, or copies of Forms W-2 online at www.paychexonline.com.

Depending on the products you choose to offer your employees, you may use the Manage Employee Access Online screen in Paychex Online to control what information your employees see.

Getting Your Employees Started

Click Learn More (1), at the bottom of the Paychex Online Log-In screen to print the Registration job aid and access the Paychex Online Registration tutorial. Use these resources to help guide your employees through the simple registration process.

Employees may self-register for a Paychex Online account by clicking Sign-Up (2) from the Log-In screen, at www.paychexonline.com, and entering the required personal and account information.

If employees already have access to this Web site, they will not have to register; they can use their current user name and password.

Once logged in, the employee can click the Documents service icon to view the information he has access to. (3)

Contact your Paychex representative for assistance with Employee Access Online services.
EMPLOYEE QUESTIONS ABOUT ACCESSING W-2S AND CHECK STUBS

Employees may have questions about using Paychex Online. Direct them to the following resources:

- For questions about the information on their check stub or Form W-2, employees should contact you. If you are unable to answer their questions, you can contact your Paychex representative.
- For questions about user name and password resets and access to the site, employees should review the Paychex Online tutorials and job aids at www.paychexonline.com.

Using Manage Employee Access Online

Important Reminders:
Paychex Online is compatible with Adobe® Flash® Player version 10.1 or higher. If needed, download the latest version at http://get.adobe.com/flashplayer.

Regardless of which Employee Access Online products you subscribe to, Manage Employee Access Online, is accessible from the People services page by selecting the Actions tab. (1)

You control employee access to the products you select.

Personal and Payroll Information (2)

- Grant or block employee access to view or edit their own personal and payroll information.

Check Stubs/W-2’s (3)

- Grant or block employee access to view their own check stubs or copies of Forms W-2.
- Indicate when employees can view their check stubs online.
PERSONAL AND PAYROLL INFORMATION

If you subscribe to this product, you can grant your employees access to their own personal and payroll information. The following screen displays for the employee. (1)

Up to six categories display in the left navigation menu. They contain the following information:

- **Personal** — Name, address, phone numbers, and employment status
- **Time Off** — Accrual rate and current balance for any policies maintained
- **Bank Accounts** — Net pay direct deposit information and any allocations
- **Taxes** — Filing status for federal, state, and local taxes (if applicable)
- **Compensation/Pay** — Pay information, including rate of pay or salary and any additional recurring earnings or compensation
- **Deductions** — Recurring paycheck deductions

The Time Off category (2) is only available to the employee if your company subscribes to the Time Off Accrual product. The Bank Accounts category only displays if you subscribe to the Direct Deposit product and your employee has a direct deposit account.

Paychex Professional Organization (PEO) clients: Employer-paid benefit deductions, such as Health and Benefit Employer Contribution, will not display to your employees.
How to Manage Employee Access to this Information

From the Manage Employee Access screen, select **Personal and Payroll Information**. (1)

This screen displays your active and inactive employees, regardless of whether they are registered on the Paychex Online Web site. The following workers will not display (and they cannot access their information online):

- employees who have been terminated for more than 30 days
- independent contractors (1099 payees)

You can control employee access to personal and payroll information:

**View** (3) — This is the default setting. This allows employees read-only access to all six categories of information.

**Block** (4) — Select **Block** to prevent the employee from accessing all categories of his personal and payroll information.

**Edit** (5) — Select **Edit** to allow the employee to view all categories and edit some of his personal information.

Granting “edit” access to an employee enables him to change his address, home and work e-mail addresses, and phone numbers. Updates to this information may change state or local tax withholding status in your payroll records.

Paychex Professional Employer Organization (PEO) clients: Granting access to edit information in this screen is not available. Contact your Paychex representative if you have questions.
CHECK STUB/W-2’S

If you subscribe to this product, employees can access up to four years of Forms W-2 that were processed by Paychex. They will have access to check stubs starting with the first run date after you enroll with the Employee Access Online product. Check stubs are available to employees for up to two years.

The Check Stub/W-2’s screen (1) in Manage Employee Access Online has two functions:

- **Block Individual Employee Access** — block or grant online access to all check stubs or copies of Forms W-2 for individual employees
- **Block Individual Payroll’s Check Stubs** — block all employees’ access to check stubs from a particular payroll or indicate when a payroll should be released for employee view

**Block Individual Employee Access**

You may control whether each employee can view his check stubs or Forms W-2.

To block an employee from accessing either his Forms W-2 or check stubs, select the appropriate box: **Block W-2** (2) or **Block Check Stub** (3).

**Paychex Professional Employer Organization (PEO) clients:** If you cannot change an employee’s access for Forms W-2 or check stubs, contact your Paychex representative.

**Employees of Paychex Professional Employer Organization (PEO) clients** can only access Forms W-2 for tax years 2011 and greater.

**Use Paychex Online Reports to view your employees’ Forms W-2 and check stubs.**

**Select Block All or Unblock All** (4) to apply the same W-2 or check stub option to all employees.

**If you block or unblock an employee, it takes 24 hours for that service icon to be removed from or added to the employee’s Message Center at www.paychexonline.com. The data will not be available, but the menu option still displays for 24 hours.**
Managing Employee Access

Managing Employee Access

Paychex Online

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Block Individual Payroll’s Check Stubs

This section of the Manage Employee Access Online screen allows you to:

- block all employees from seeing records from an entire payroll, (1) or
- indicate when check stubs should be available to the employees. (2)

This only applies to payrolls with a future check date. You can allow employees to access their check stubs on the check date or on the day the payroll processes (the run date).

If you block a payroll, you must unblock it within 40 days from the day it processed for the employees to have online access to that check stub. Check stubs for any payroll still blocked after 40 days will be permanently unavailable to the employees. If the company subscribes to Paychex Online Reports, you will be able to access check stubs there.

If you use Paychex Online Payroll to input payroll information, you may block a payroll or change the release date for a payroll only after the payroll has processed. Once it processes, log in to Paychex Online, access the Manage Employee Access Online screen and change your options. If you need to update these options before you submit your payroll, contact your Paychex representative.

You can only block a payroll or individual check date from view after the payroll has processed.

If a payroll has a check date after the system date or if you blocked the entire pay period, the Release to Employees on field (3) will be disabled.