HR Online Utilization

Employee Edition

The Paychex® HR Online Experience

PAYCHEX®

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The functionality covered in this document does not necessarily represent the functionality available to you from Paychex HR Online.

The availability of the functionality covered herein is determined by your organization.

Getting Started in Paychex® HR Online

Step 1: Log In

Using either the Microsoft® Internet Explorer® Version 7.0 or higher, or Mozilla® Firefox® 2 or higher Web browser, go to eservices.paychex.com. Log in to the application using the following information:

- Company ID = **04## XXXX**
  - **04##** = Branch ID
  - **XXXX** = Client ID
- Your user name is the first initial of your first name and your entire last name (for example, the user name for Stacy Smith would be ssmith).
- Your password is the first initial of your first name, the first initial of your last name (both capitalized), and the last four digits of your social security number.

For example, using Stacy Smith with a social security number of XXX-XX-6789, the password would be SS6789.

Step 2: Change Your Password

To better protect your account, make sure that your password is memorable for you but difficult for others to guess. Do not share your password with anyone, and do not use a password that you've used in the past.

For security purposes, your new password must be a minimum of six characters.

A strong password contains a combination of uppercase and lowercase letters (remember that your password is case sensitive), numbers, and special characters, such as +, ?, and *.

After logging in to HR Online, you will see a series of links which allow you to navigate the application.

Left Navigation Menu

To access links in the left navigation menu:

1. Click the plus sign next to today's date to expand the full list of links. (1)
2. Click a category heading to expand the links available in that section.

Message Center

When you log in, you may find new messages. The Message Center has three sections:

- **New Messages**
  By selecting **View Message Details**, you will see comments sent by your supervisor or the company administrator about your PTO Requests, Benefit Elections,or Training Enrollment requests. (2)
- **Reminders**
  By selecting **View Reminder Details**, you can see Custom or Self Reminders. (3)
- **Action Required**
  Action Required indicates that an acknowledgement is required for receipt of a performance review or an employee handbook. (4)

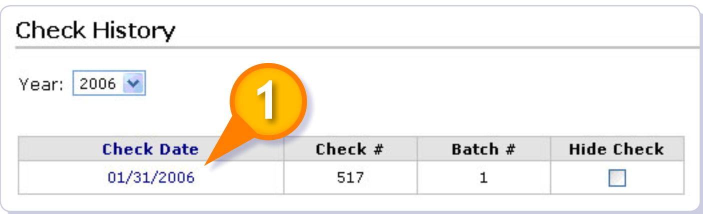
To remove a message, select it and click **Delete Checked**.

Compensation

Check History

To view or print individual check stubs from Check History, select the **Check Date.** (1)

To view a previous years Check Date, select the Year drop-down menu.


Check History

Year: 2006

Check Date	Check #	Batch #	Hide Check
01/31/2006	517	1	

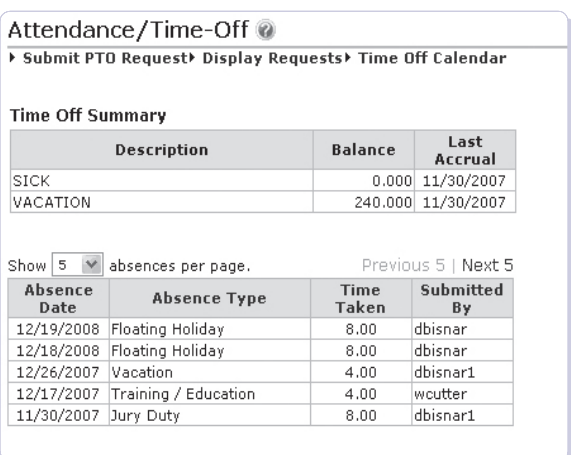
Attendance/Time-Off

Use Attendance/Time-Off to request PTO (Paid Time Off) and to review your time-off balances and logged absences (for example, vacation, PTO, sick days).

The Time Off Summary displays current time-off balances received from Paychex, Inc. *as of the last payroll*.

A list of recorded absences displays.

Report any discrepancies to your supervisor or Human Resources Representative.


Attendance/Time-Off

Submit PTO Request Display Requests Time Off Calendar

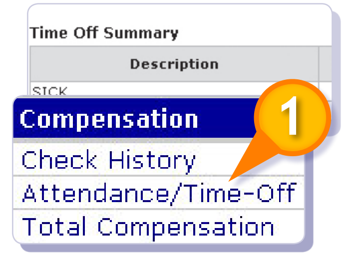
Time Off Summary

Description	Balance	Last Accrual
SICK	0.000	11/30/2007
VACATION	240.000	11/30/2007

Show 5 absences per page. Previous 5 | Next 5

Absence Date	Absence Type	Time Taken	Submitted By
12/19/2008	Floating Holiday	8.00	dbisnar
12/18/2008	Floating Holiday	8.00	dbisnar
12/26/2007	Vacation	4.00	dbisnar1
12/17/2007	Training / Education	4.00	wcutter
11/30/2007	Jury Duty	8.00	dbisnar1

"HOW DO I SUBMIT A PTO REQUEST?"

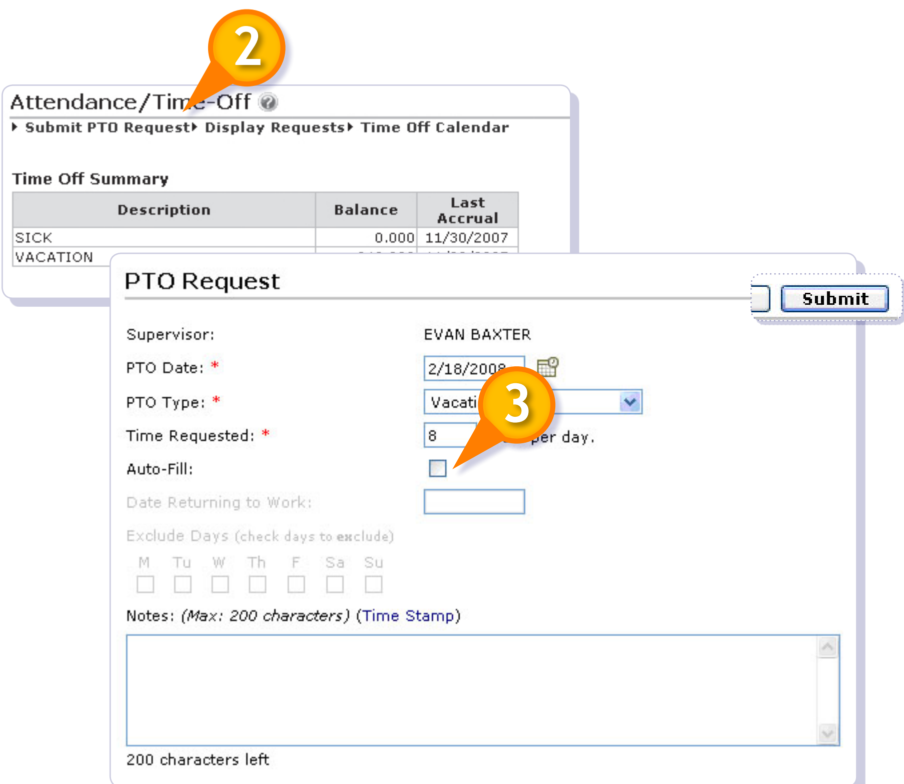


1. Select **Attendance/Time-Off** (employee tab | Compensation). **(1)**
2. Click **Submit PTO Request**. **(2)**

   The following fields are required:

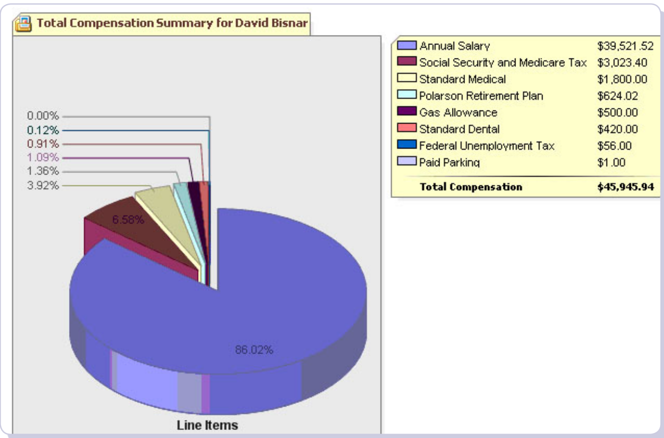
   - **PTO Date -** either typed or chosen from the calendar feature
   - **PTO Type -** selected from the drop-down menu
   - **Time Requested** – entered as hours per day
3. You may also include notes to your supervisor.
4. Once you have entered the information, click **Submit**. You can view the status of your request or cancel it on the PTO Request Submission History screen, located in Display Request.

i *Use Auto-Fill if you will be out for more than one day. To use this option, a return date must be added.* **(3)**



Total Compensation Summary

On the Total Compensation Summary screen, you are presented with a chart summarizing the distribution of your total compensation from the company. The summary also outlines Employer and Employee contributions to compensation items, where applicable.

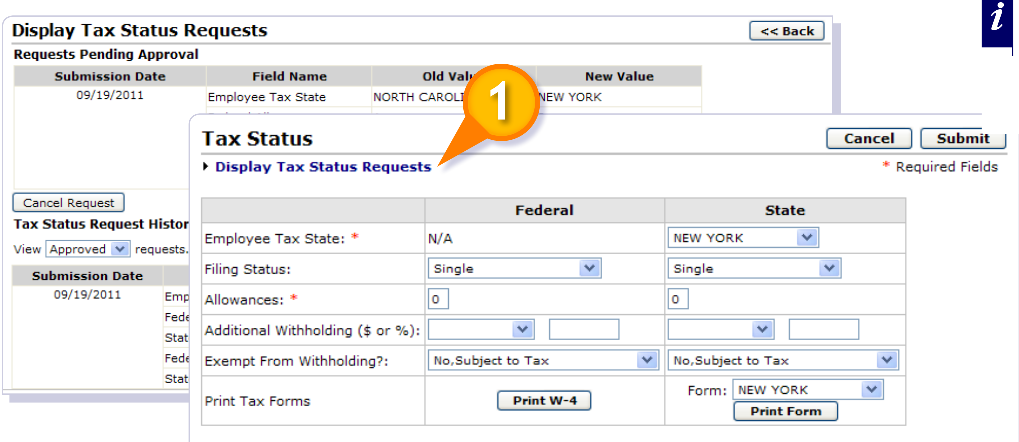


Tax Status

In the Tax Status screen, you can verify and/or adjust your federal and state filing status, allowances, and optional withholding amount. This information is connected to your company's payroll system. Changes made to this screen are submitted to your supervisor or company administrator for approval. You can print a copy of your W-4, which you can sign and send to your company's payroll department if required.

Click **Display Tax Status Requests** (1) to view change requests that are pending approval and to view approved, declined, or cancelled requests.

Click Cancel Request to remove a pending request.



Print Tax Forms

The Print Tax Forms screen is used to access and print copies of your W-2s for up to four tax years. The copies may be used to file your income taxes.

Depending on how long your company has processed payroll with Paychex, you may be able to select multiple years from the Tax Year drop-down menu.

Print Tax Forms

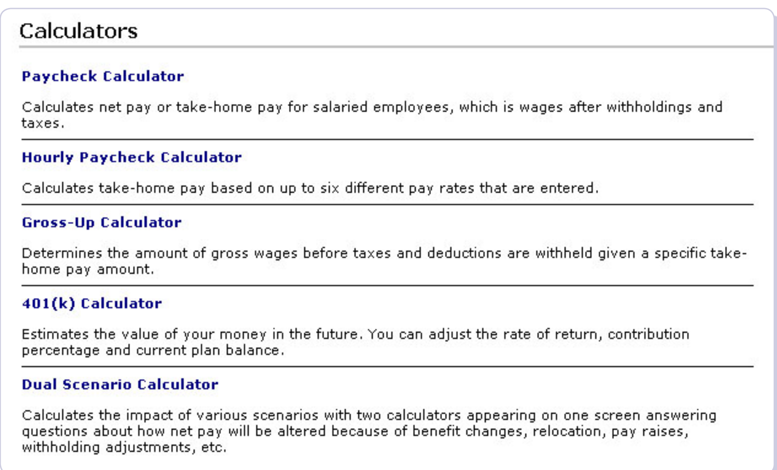
Your Information	
Name:	DAVID BISNAR
Home Address:	5645 SHADBLOW ROAD
	MORGANTOWN, PA 26505
SSN:	XXX-XX-4056
Date of Birth:	09/24/1973
Gender:	
Employee ID:	630
Date Hired:	11/20/1995 12:00:00 AM

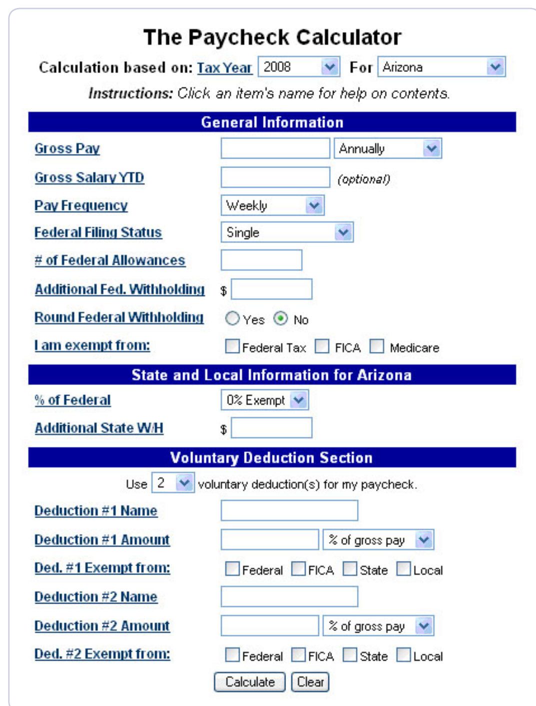
Calculators

Calculators are used to evaluate impact to your net pay and 401(k) balance, but will not change any of your current information. If you would like to change benefits, tax withholdings, or 401(k) elections, refer to the appropriate links in HR Online.

The following "What If" scenarios may be calculated in HR Online:

- **Paycheck** - calculate net pay for salaried employees, which is wages after withholdings and taxes
- **Hourly Paycheck** - calculates take-home pay based on up to six different pay rates
- **Gross-Up** - determines the amount of gross wages before taxes and deductions given a specific take-home pay amount
- **401(k)** - estimates the value of your money in the future. You can adjust the rate of return, contribution percentage, and current plan balance
- **Dual Scenario** - calculates the impact of various scenarios with two calculators appearing on one screen answering questions about how net pay will be altered because of benefit changes, relocation, pay raises, withholding adjustments, etc.



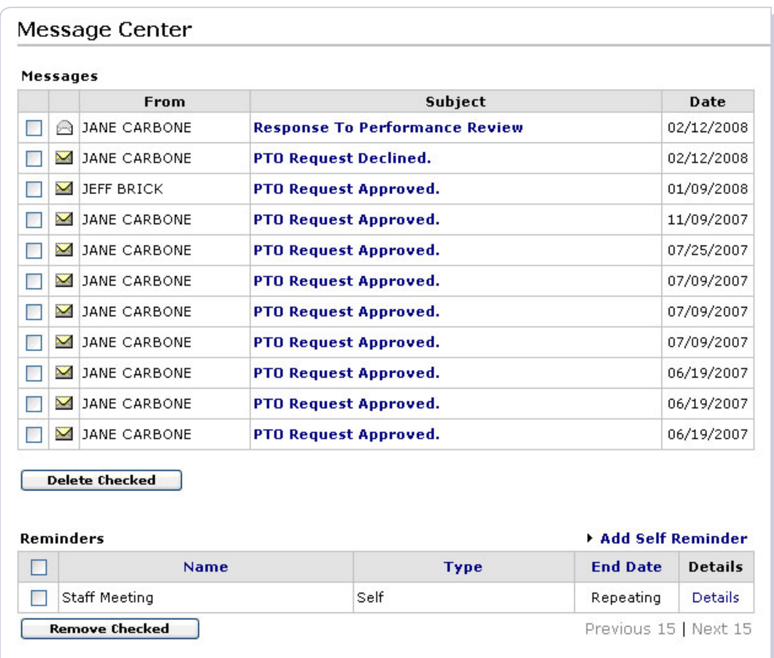


Company Information

Message Center

The Message Center allows you to view messages from your company administrators or your supervisor regarding open enrollment elections, training enrollments and PTO Requests. You can also create and update Self Reminders.

Self reminders can be created to notify you of upcoming events. This type of Reminder displays only for the user who created it. An example of a Self Reminder is one that is created to remind you on the first of each month that a monthly report is due on the tenth of the month.


Message Center

Messages

		From	Subject	Date
		JANE CARBONE	Response To Performance Review	02/12/2008
		JANE CARBONE	PTO Request Declined.	02/12/2008
		JEFF BRICK	PTO Request Approved.	01/09/2008
		JANE CARBONE	PTO Request Approved.	11/09/2007
		JANE CARBONE	PTO Request Approved.	07/25/2007
		JANE CARBONE	PTO Request Approved.	07/09/2007
		JANE CARBONE	PTO Request Approved.	07/09/2007
		JANE CARBONE	PTO Request Approved.	07/09/2007
		JANE CARBONE	PTO Request Approved.	06/19/2007
		JANE CARBONE	PTO Request Approved.	06/19/2007
		JANE CARBONE	PTO Request Approved.	06/19/2007

Delete Checked

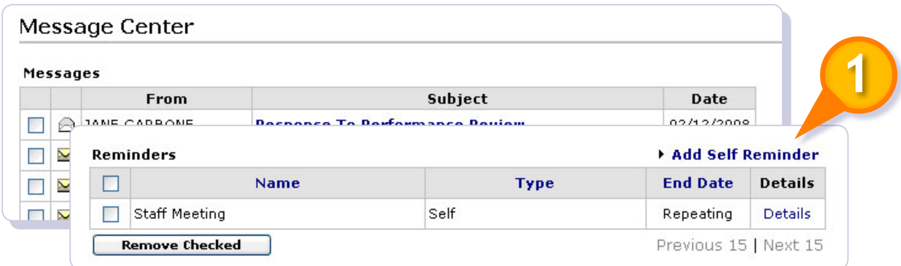
Reminders ▸ Add Self Reminder

	Name	Type	End Date	Details
	Staff Meeting	Self	Repeating	Details

Remove Checked   Previous 15 | Next 15

"HOW DO I CREATE A SELF REMINDER?"

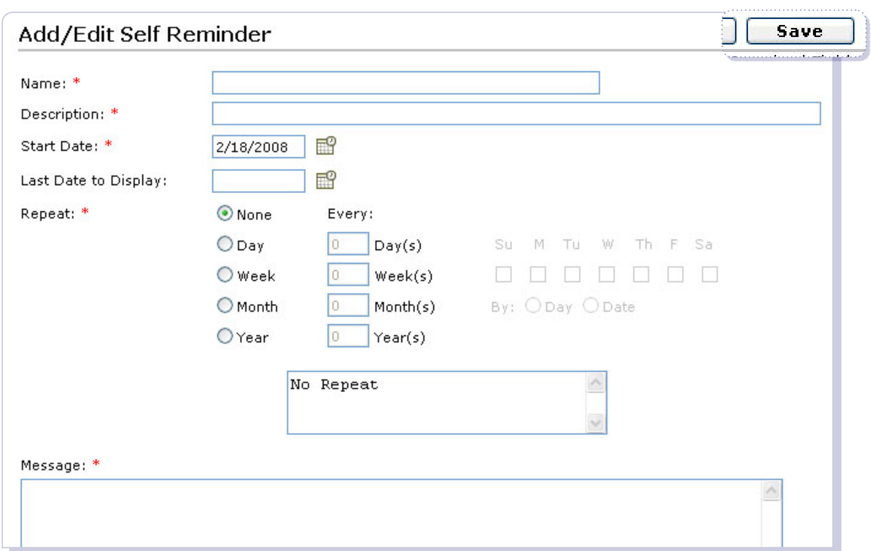
1. Navigate to the Company Information section and click **Message Center**.
2. Click **Add Self Reminder**. (1)



3. The following are required fields:
   - Name
   - Description
   - Start Date - when you would like the message to start displaying
   - Repeat - frequency to repeat the reminder
   - Message

Self reminders can be set to repeat as required.

Click **Save** to record your changes and exit the screen.



Employee Handbook

You can view, print, and acknowledge receipt of your company's employee handbook and manuals on the Employee Handbook screen. Click the Description to view or print the handbook.

*If required, select the **Provide My Initials** check box, and click **Yes** to confirm prior to providing an electronic signature.*

Employee Handbook

1

Description	Last Modified	Acknowledgements
Employee Handbook 2012	10/20/2011	Acknowledge receipt of handbook
Saftey Training	02/25/2009	N/A

When required, click **Acknowledge receipt of handbook (1)**, then click **Provide Electronic Signature**, and click **Yes** to confirm.

Handbook Acknowledgement - Microsoft Internet Explorer provided by Paychex, Inc.

Handbook Acknowledgement Print Close

This is to acknowledge that I have received a copy of the Employee Handbook and I understand that it contains information about the employment policies and practices of the company. I agree to read and comply with this Employee Handbook. I understand that the policies outlined in this Employee Handbook are management guidelines only, which in a developing business will require changes from time to time. I understand that the company retains the right to make decisions involving employment as needed in order to conduct its work in a manner that is beneficial to the employees and the company. I understand that this Employee Handbook supersedes and replaces any and all prior Employee Handbooks and any inconsistent verbal or written policy statements.

I understand that except for the policy of at-will employment, which can only be changed by the president of the company in a signed written contract, the company reserves the right to revise, delete and add to the provisions of this Employee Handbook at any time without further notice. All such revisions, deletions or additions to the Employee Handbook will be in writing and will be signed by the president of the company. I understand that no oral statements or representations can change the provisions of this Employee Handbook.

I understand that this Employee Handbook is not intended to create contractual obligations with respect to any matters it covers and that the Employee Handbook does not create a contract guaranteeing that I will be employed for any specific time period.

THIS COMPANY IS AN AT-WILL EMPLOYER. THIS MEANS THAT REGARDLESS OF ANY PROVISION IN THIS EMPLOYEE HANDBOOK, THE COMPANY OR I MAY TERMINATE THE EMPLOYMENT RELATIONSHIP AT ANY TIME, FOR ANY REASON, WITH OR WITHOUT CAUSE OR NOTICE. NOTHING IN THIS EMPLOYEE HANDBOOK ADDENDUM OR IN ANY DOCUMENT OR STATEMENT, WRITTEN OR ORAL, SHALL LIMIT THE RIGHT TO TERMINATE EMPLOYMENT AT-WILL. NO OFFICER, EMPLOYEE OR REPRESENTATIVE OF THE COMPANY IS AUTHORIZED TO ENTER INTO AN AGREEMENT—EXPRESS OR IMPLIED—WITH ME OR ANY EMPLOYEE FOR EMPLOYMENT FOR A SPECIFIED PERIOD OF TIME UNLESS SUCH AN AGREEMENT IS IN A WRITTEN CONTRACT SIGNED BY THE PRESIDENT OF THE COMPANY.

I understand that this Employee Handbook refers to current benefit plans maintained by the company and that I must refer to the actual plan documents and summary plan descriptions as these documents are controlling.

I have read and I understand the Vacation/Paid Time Off (PTO) policy in this Employee Handbook.

Initials ____________ Date ____________

I also understand that if a written contract is inconsistent with the Employee Handbook, the written contract is controlling.

If I have questions about the content or interpretation of the Employee Handbook, I will ask my supervisor.

NAME ______________________________

DATE ______________________________

____
EMPLOYEE SIGNATURE

☐ **Provide my initials**

Company Directory

You can look up employees in the company using the Company Directory. Search by last name and view a person's location, email, work phone, mobile phone, pager, and fax if available.

Company Directory

E=E-mail, **W**=Work Phone, **M**=Mobile Phone, **P**=Pager, **F**=Fax

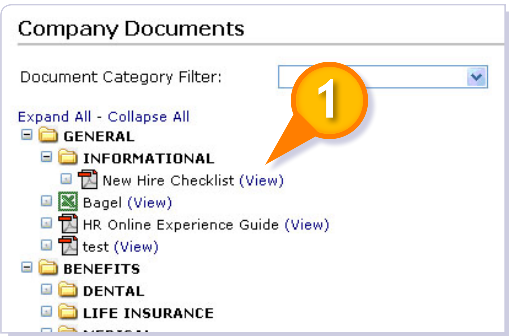
Previous 25 | Next 25 Search by Last Name: Go

Last Name	First Name	Branch	Dept	Contact Info
BAXTER	EVAN	1	100	E: ahatch@paychex.com
BISNAR	DAVID	2	200	E: ahatch@paychex.com
Bradly	John	1	400	E: jbradly@email.com
BROOKS	ANDREW	1	300	E: dservati@paychex.com W: (585) 383-3100 x33110
CARBONE	JANE	2	1000	
CARDWELL	KATHY D.	1	200	
Clark	Sandy	1	200	E: sclark11@yahoo.com
CUPOLO	CARMEN	1	1000	
CURLEY	EDDIE	1	600	
CURREN	JACKSON	2	1000	
CUTTER	WENDI L.	1	1000	E: ahatch@paychex.com
CZECH	ROBERT	1	900	
D'AMBRA	GERALD	2	800	
DAKIN	MATTHEW	2	900	E: dservati@paychex.com

Company Documents

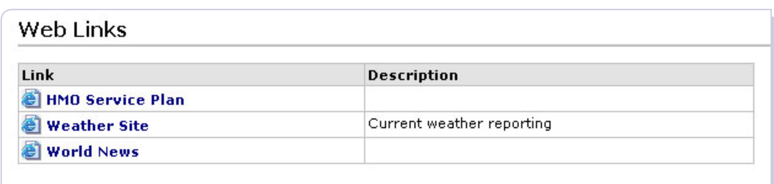
In Company Documents you have access to internal company documents by clicking **View** (1). Once the document displays in a new window, you can print or save the item.

Use the icon at the bottom of the screen to download Adobe Acrobat Reader if needed.



Web Links

On the Web Links screen, you can gain access to quick links for work-related websites that have been approved by your company administrators.



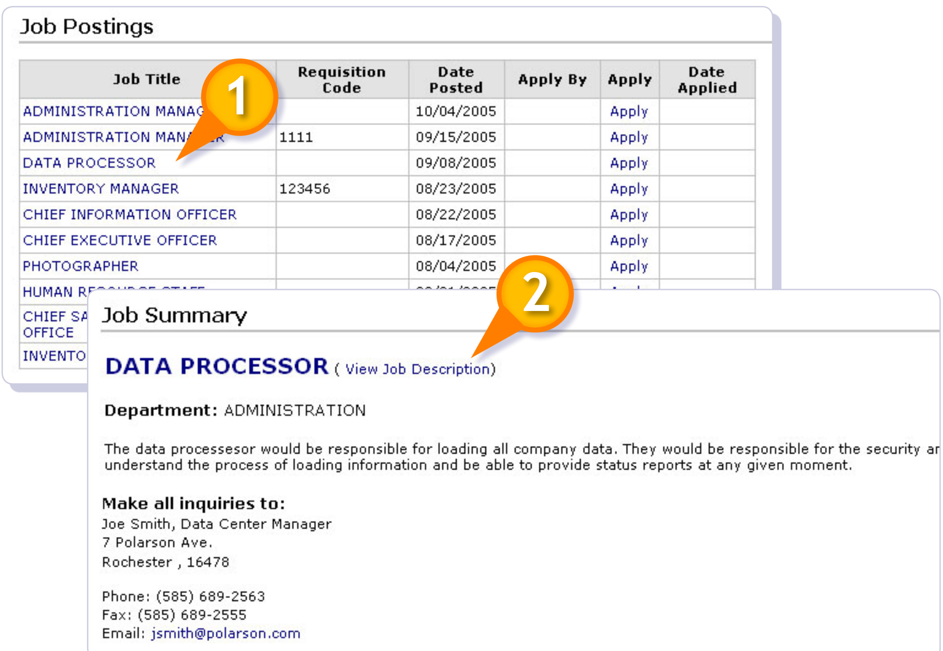
Blank Forms

In Blank Forms you can print federal and state-required forms as well as Paychex, provided standard forms, such as the Payroll Deduction Authorization form or Employment Eligibility (I-9).

Job Postings

You can view and apply for internal company job postings by clicking **Apply** to the right of the position. Enter a reason for applying and add a text version of your resume.

You may view additional information about the posting by selecting the **Job Title** (1). If a job description is available, you will be able to select **View Job Description** (2) in the Job Summary screen.



Personal Information

Home Information

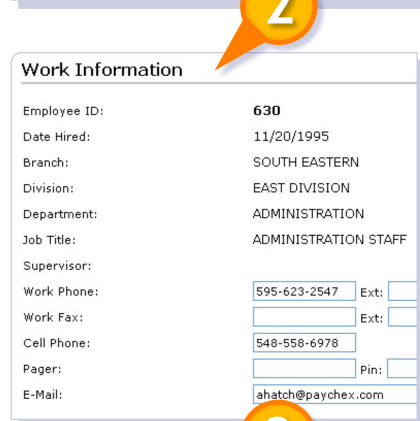
On the Home Information screen **(1)**, verify that your home address and phone number are up to date. When you update information, click **Save** at the top of the screen to save your changes.

If your name or birth date is incorrect, contact your supervisor or company administrator to have this information corrected.

Work Information

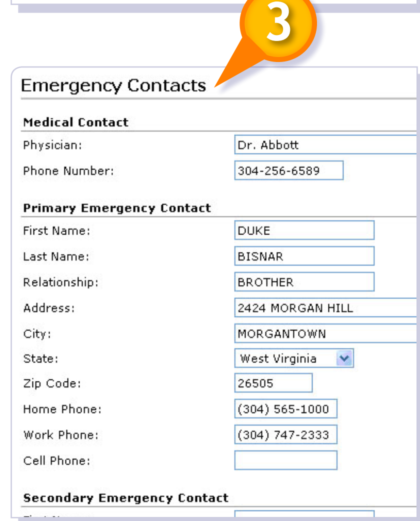
Use the Work Information screen **(2)** to verify and update work contact information including phone, fax, cell, and pager numbers as well as your email address. When you update information, click **Save** at the top of the screen to save your changes. Updating information on this screen will update company records as well as the Company Directory.

If any work information, such as Date Hired, Job Title, or Supervisor is incorrect, contact your supervisor or company administrator to correct this information.



Emergency Contacts

The Emergency Contacts screen **(3)** provides an area to add two emergency contacts and physician information. The notes section allows you to enter any relevant information you would like the company to have, such as allergy information.

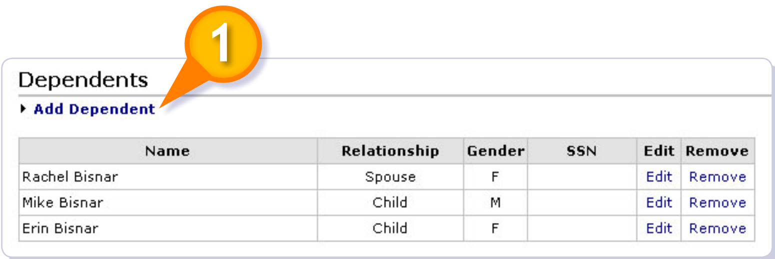


Dependents

The Dependents screen is used to track dependent information for your family.

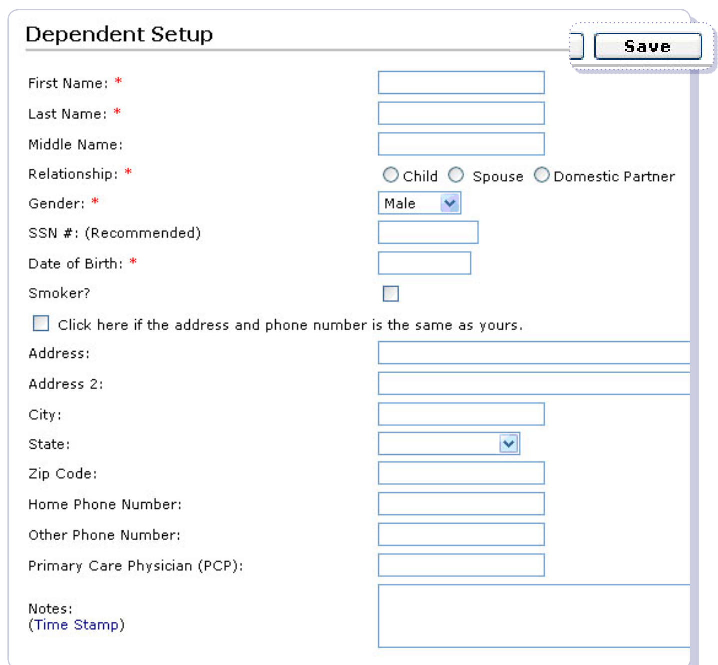
"HOW DO I ADD A DEPENDENT?"

1. Navigate to the Personal Information section and click Dependents. Click **Add Dependent**. **(1)**



2. The following fields are available for each dependent:

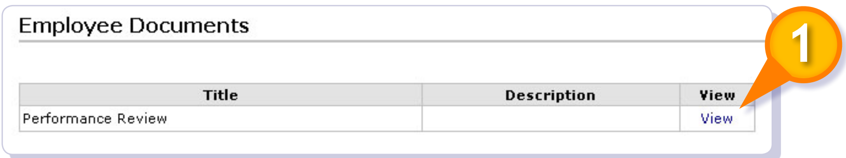
- **First Name** *(required)*
- **Last Name** *(required)*
- **Middle Name**
- **Relationship**
  Child, Spouse, or Domestic Partner *(required)*
- **Gender** *(required)*
- **SSN #** *(recommended)*
- **Date of Birth** *(required)*
- **Smoker?**
- **Address Information**
  You can select **Click here** if the address and phone number is the same as yours or manually enter another address.
- **Primary Care Physician**
- **Notes**



3. Click **Save** when complete. Dependents are listed on the main Dependents screen. Repeat the same steps for each additional dependent. Choose **Edit** or **Remove** if needed.

Employee Documents

The Employee Documents screen allows you to view and print documents that are specific to you and your employment with the company. These documents can only be viewed by you, your supervisor, and the authorized administrators at your company. Click **View** to access the information. **(1)**


Employee Documents

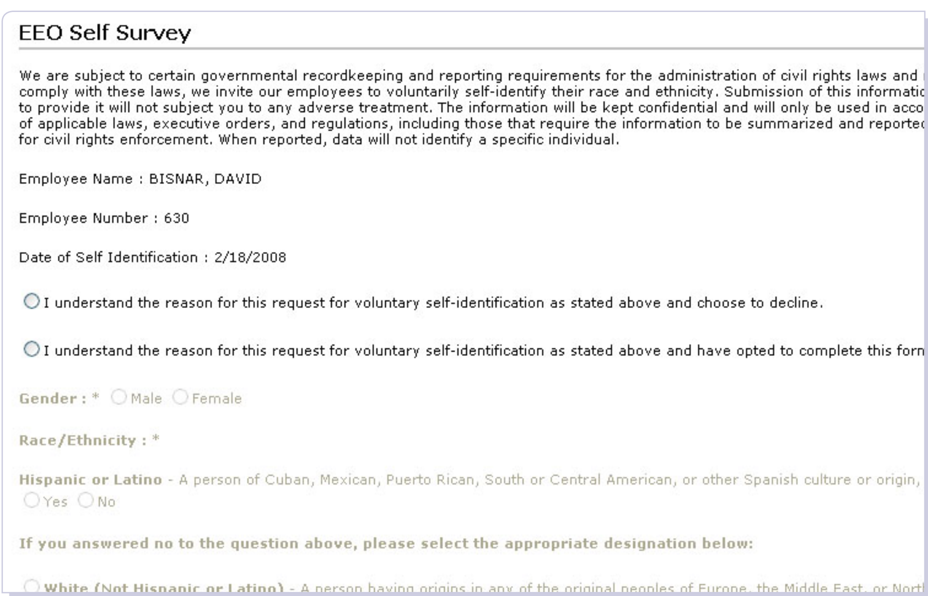
Title	Description	View
Performance Review		View

EEO Self Survey

The EEO Self Survey screen allows you to self-select your race and ethnicity. Federal laws may require that your company report this information annually.

Submission and completion of the data is voluntary and may be refused.

Once the survey has been declined or completed, the link will no longer be available. If you would like to complete the survey again, contact your HR department.


EEO Self Survey

We are subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and comply with these laws, we invite our employees to voluntarily self-identify their race and ethnicity. Submission of this informatic to provide it will not subject you to any adverse treatment. The information will be kept confidential and will only be used in acco of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reportec for civil rights enforcement. When reported, data will not identify a specific individual.

Employee Name : BISNAR, DAVID

Employee Number : 630

Date of Self Identification : 2/18/2008

I understand the reason for this request for voluntary self-identification as stated above and choose to decline.

I understand the reason for this request for voluntary self-identification as stated above and have opted to complete this forn

Gender : * Male Female

Race/Ethnicity : *

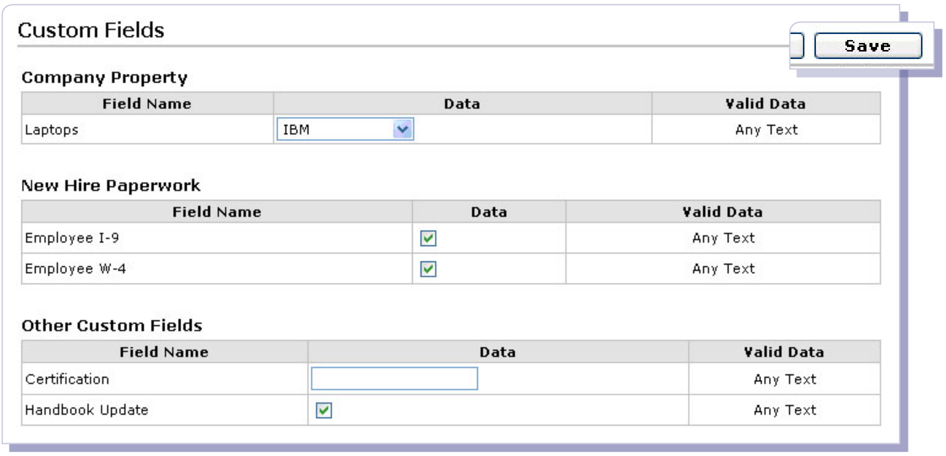
Hispanic or Latino - A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin,
Yes No

If you answered no to the question above, please select the appropriate designation below:

White (Not Hispanic or Latino) - A person having origins in any of the original peoples of Europe, the Middle East, or Nortl

Custom Fields

The Custom Fields screen allows you to view and update information that is specific to you and your employment with the company. These fields track data elements specified by your company. Once you have filled out a field in the Data area, click **Save**.


Custom Fields

Save

Company Property

Field Name	Data	Valid Data
Laptops	IBM	Any Text

New Hire Paperwork

Field Name	Data	Valid Data
Employee I-9	☑	Any Text
Employee W-4	☑	Any Text

Other Custom Fields

Field Name	Data	Valid Data
Certification		Any Text
Handbook Update	☑	Any Text

Training, Education and Skills

Training Taken

The Training Taken screen displays completed training sessions and associated data, such as dates and test scores, where applicable.

Training Taken

Course Name	Date Taken	Date Expires	Completed	Grade or Score
Systems Security	2/28/2007		Yes	c

Training Curriculum

The Training Curriculum screen displays courses offered to all employees and whether courses are specific to your job title. The Status field indicates whether you have completed the course or not.

Training Curriculum

Course Name	Status	Date Expires	Grade or Score	Job Specific
Company Orientation	Incomplete	N/A		No
Microsoft PowerPoint	Incomplete	N/A		No
Non Harrassment Training	Incomplete	N/A		No

Enroll for Training

On the Enroll for Training screen, you can sign up for or drop courses currently scheduled by your company. Select the Course Name to find out information about the course, such as location, description, and start and end times.

In the Action field, click **SIGN-UP** to register for the course **(1)**. Once you sign up for a course, the Action field will change to **DROP** **(2)**. If you want to remove your enrollment, click **DROP** before the course start time.

Enroll for Training

Class Number	Course Name	Start Date	Start Time	End Time	Capacity	Number Enrolled	Action
5	Non Harassment Training	1/1/2010	8:00 AM	10:00 AM	50	0	SIGN-UP
4	Customer Service Skills	8/1/2010	8:30 AM		20	2	SIGN-UP

1

Enroll for Training

Class Number	Course Name	Start Date	Start Time	End Time	Capacity	Number Enrolled	Action
5	Non Harassment Training	1/1/2010	8:00 AM	10:00 AM	50	1	DROP
4	Customer Service Skills	8/1/2010	8:30 AM		20	2	SIGN-UP

2

Education

The Education screen displays all of your School/Award information as entered by your supervisor or company administrator.

If there are any discrepancies with your information, contact your supervisor or company administrator to correct the information.

Education

School/Award	Degree	Years	Major	GPA	Graduated
SUNY at Oswego	Bachelors	4	Business Administration	3.50	Yes
University Of Rochester	Masters	3	Business Administration	3.25	

Skills

The Skills screen displays all of your skill names, levels, and years of experience as entered by your supervisor or company administrator.

If there are any discrepancies with your information, contact your supervisor or company administrator to correct the information.

Skills

Skill Name	Skill Level	Years Of Experience	Expiration Date
Typing	Some Knowledge	5	
French	Expert	12	

Performance

Performance Reviews

In the Performance Reviews screen, you can view and print performance reviews that have been shared by your supervisor. **(1)**

Refer to the "Completing a Self or Peer Review" document for the steps necessary to complete a self review.

Click **Edit** to add Employee Comments.

Click the Review Title to print a copy of the review or provide an elctronic signature. **(1)**

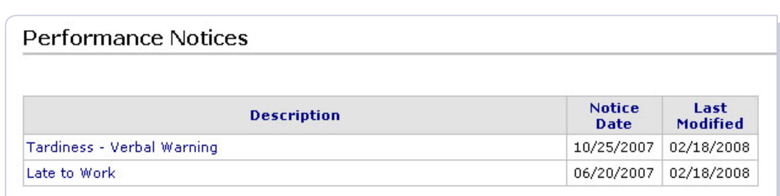
Employee Comments must be added before you provide an electronic signature.

The Signature Status column will display Not complete, Signed on date, or N/A (if a signature is not required).

Performance Notices

The Performance Notices screen displays disciplinary items that have been reviewed with you by your supervisor and Human Resources.

Click the Description to view or print the notice.



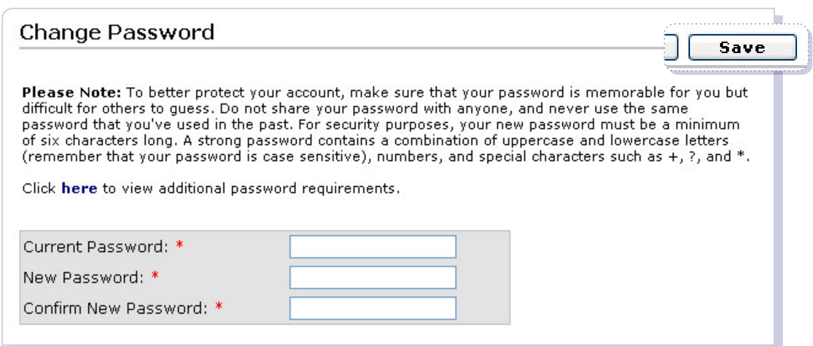
Security

Change Password

The Change Password screen allows you to change your password once you are logged in. It is recommended that you change your password regularly to maintain the security of your personal information.

Enter your current password once and new password twice, then click **Save**. The next time you log in, use your new password.

If you forget your password and are unable to log in, please contact your supervisor or company administrator and have them change your password for you.



E-Mail Preferences

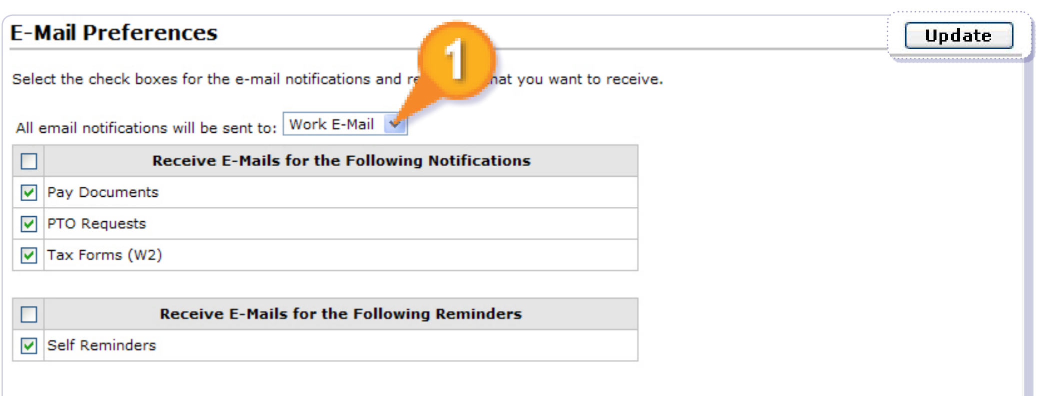
On this screen you can designate the types of notifications and reminders you would like to receive by email. You can receive email for the following items:

- When Pay Documents are available
- When your PTO Requests have been approved or declined
- When Tax Forms are available
- When you receive Custom Reminders (a type of message sent by your supervisor or company administrator)
- When you receive Self Reminders

If you would like to receive notifications via email, verify that your email address is entered in either the Work Information or Home Information screen, which can be found in the Personal Information section.

Use the drop-down menu **(1)** to select whether email notifications should be sent to your home or work email address.

A checkmark will display next to the email notifications that your supervisor and company administrator have selected. If you would like to discontinue receiving email, deselect the box next to the item and click **Update**.



Other Preferences

Choose to keep the left hand menu expanded each time you log in by selecting **Keep Menus Expanded,** then click **Update**.