

EMPLOYEE MANAGEMENT



PAYCOM
UNIVERSITY



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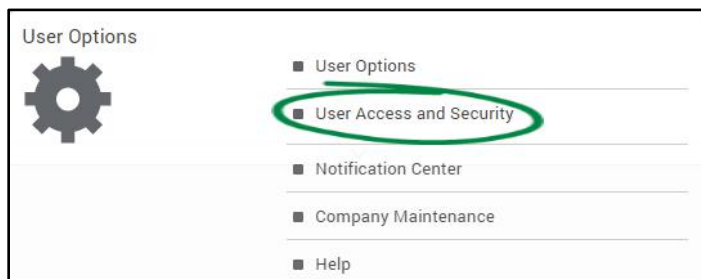


Having a standard, organized onboarding process in place is crucial to making a great first impression. With Paycom, you can create New Hire Templates and use Self-Onboarding to give your new hires the best possible onboarding experience.

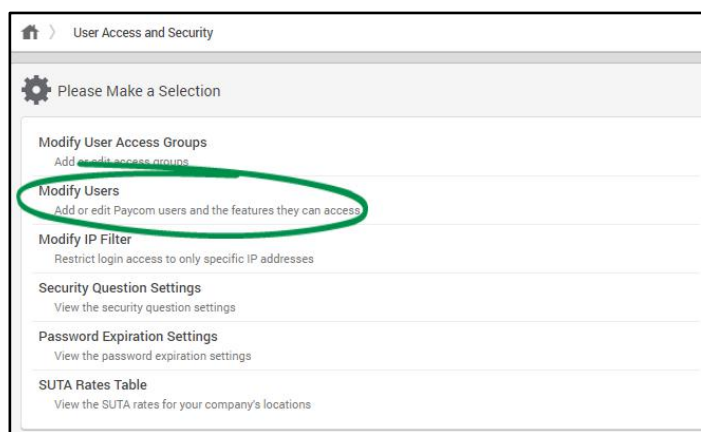
This guide will walk you through how to make changes to an employee's profile. We will review all of the employee forms, explaining what each form contains, as well as review the different search options. After reading this guide, you will be the master of navigating and managing your employee's information!

User Access

To grant and control user access to Employees, first click "User Access and Security" from the User Options tile on the main menu.



From the User Access and Security menu, click "Modify Users."





From the Permission Profiles tab, click into the profile you wish to edit.

Select	Profile Code	Profile Name	Users Assigned	Edit	Copy	Preview	Change History	Sync Profile	Delete
<input type="checkbox"/>	4210	Full Access - Paycom Default	2						In Use
<input type="checkbox"/>	5332	All Access	24						In Use
<input type="checkbox"/>	5696	Manager	6						In Use

Click the "Employees" tab on the left to view Employee Management permissions. From here, check the box next to the appropriate permissions to determine the access level. We'll explain what each permission controls so you can ensure your users have the proper level of access to each Employee Management feature.

Modify Permission Profile

* Indicates Required Field

Profile Name: Admin

Search: Search or Make Selection

Employees (selected)

Employee Management (selected)

Permission	Access Level
Add New Employee	<input checked="" type="checkbox"/>
Add W-2 Employees	<input checked="" type="checkbox"/>
Add 1099 Employees	<input checked="" type="checkbox"/>
New Hire Template	<input checked="" type="checkbox"/>
Employee Master Import	<input checked="" type="checkbox"/>
Import Employee Changes	<input checked="" type="checkbox"/>
New Hire Queue Import	<input checked="" type="checkbox"/>
New Hire Profile Report	<input checked="" type="checkbox"/>
New Hire Missing Fields Report	<input checked="" type="checkbox"/>
New Hire Audit Report	<input checked="" type="checkbox"/>
Hire Employee	<input checked="" type="checkbox"/>
Self-Service	<input checked="" type="checkbox"/>
Self-Service Access Profile	<input checked="" type="checkbox"/>
Clear Security Questions	<input checked="" type="checkbox"/>
New Hire Access Profile	<input type="text" value="Search or Make Selection"/>
Create/Edit Access Profile	<input checked="" type="checkbox"/>
Restrict New Hire Template Access	<input checked="" type="radio"/> No <input type="radio"/> Yes
Employee Directory	<input type="text" value="View and Setup"/>



- **Add New Employee:** Allows the user access to the Add a New Employee menu. Enabling this will reveal two more boxes, Add W-2 Employees and Add 1099 Employees. You can enable either or both of the options.
- **New Hire Template:** Grants the user access to make changes to the New Hire Template.
- **Import Employee Changes:** Allows the user to use the Employee Change Import (EMI02) to import changes to employees.
- **New Hire Queue Import:** If enabled, users can batch import new hire records into the New Hire Queue.
- **New Hire Profile Report:** If enabled, users can generate the New Hire Profile Report, which displays information from new employee records in an easy-to-read format.
- **New Hire Missing Fields Report:** If enabled, users can generate the New Hire Missing Fields Report, which highlights the missing fields for pending new hires in the New Hire Queue.
- **New Hire Audit Report:** If enabled, users can generate the New Hire Audit Report, which displays all new hire changes that occurred in the New Hire Queue during a specific date range.
- **Hire Employee:** Gives the user the ability to click “Complete” on the last tab of the New Hire Queue and finalize adding an employee.
- **Self-Service:** Allows the user to access and make changes within the Employee Self-Service® Menu.
- **Self-Service Access Profile:** Allows users to Add/Edit Self-Service Access Profiles that define what an employee has access to within Employee Self-Service®.
- **Restrict New Hire Template Access:** Restricts users’ template access, allowing them to see only the pending new hires with that template assigned.
- **Employee Directory:** Select the appropriate access level from the drop-down menu.
 - **None:** Users cannot view the Employee Directory.
 - **View Only:** Users can view the Employee Directory.
 - **View and Setup:** Users can view the Employee Directory and determine which fields display to users and/or employees.



Using New Hire Access Profiles allows you to limit the information your users are able to see on New Hire Templates.

Use the New Hire Access Profile drop-down menu to make the appropriate selection. If a new profile is needed, click the gear icon.

User Access and Security > Modify Users > Edit Permission Profile

Modify Permission Profile

* Indicates Required Field

Profile Name *

Search

[ACA, Benefits Administration and COBRA](#)
[Employees](#)
[Human Resources](#)
[Payroll](#)
[Reports](#)
[Talent Acquisition](#)
[Talent Management](#)
[Time Management](#)
[User Options](#)

Employee Management

Employee Forms

Position Management

Add New Employee

Add W-2 Employees

Add 1099 Employees

New Hire Template

Copy/Move W-2 Employees

Employee Master Import

Import Employee Changes

Hire Employee

Self-Service

Self-Service Access Profile

Clear Security Questions

New Hire Access Profile

Restrict New Hire Template Access ☐ No ☒ Yes

Then, click "Create Access Profile."

User Access and Security > Modify Users > Access Profiles for New Hires

Access Profiles for New Hires

[Create Access Profile](#)

Search

Description	Created On	Created By	Edit	Change History	Delete
New Hire	09/14/2015	bhoman			



Provide a description for the Access Profile. Then, from the respective tabs, choose which information should be included on the profile using the arrows. The information in the green Visible Fields box will display on the profile. When finished, click "Update Access Profile."

Home > User Access and Security > Modify Users > Access Profile for New Hires

Add Access Profile

Description *

The fields that are included in this access profile will be shown and made editable to the user during the new hire process. The access profile can be used to restrict access to fields that exist in a new hire template but shouldn't be seen and edited by specific users.

1. Personal Information

2. Work Information

3. Supervisors

4. Pay Information

5. Paycheck Deposit

6. Taxes

7. HR Information

8. Custom Fields

Non-Visible Fields

Search

- Middle Name
- Nicknames
- Zip Code Extension
- Secondary Phone
- Personal Email
- Marital Status
- EEOC Ethnicity
- EEO-1 Disability Status
- First Emergency Contact
- Second Emergency Contact

Visible Fields

Search

- New Employee Code
- Employee Photo
- First Name
- Last Name
- Social Security Number
- Address
- City
- State
- Zip
- Primary Phone

Now, your newly created Access Profile will be available to assign through Permission Profiles.



The Employee Forms tab will allow you to further the access of your users in the following ways:

Modify Permission Profile

* Indicates Required Field

Profile Name *

Search

ACA, Benefits Administration and COBRA

Employee Management **Employee Forms** Position Management

Employees

Human Resources

Payroll

Reports

Talent Acquisition

Talent Management

Time Management

User Options

Make Employee Changes	<input checked="" type="checkbox"/>	Employee Change Comments	<input checked="" type="checkbox"/>
View Today's Changes	<input checked="" type="checkbox"/>	Can Override Position Defaults	<input checked="" type="checkbox"/>
Hide Rate/Taxes on Forms	<input type="checkbox"/>	Override Cascading Labor Allocation	<input type="checkbox"/>
Hide Form 3 Birth Year and Age	<input type="checkbox"/>	Allow ESS View as Employee	<input checked="" type="checkbox"/>
Employee Changes Approval Dashboard	<input checked="" type="checkbox"/>		
No Access	Read Only	Edit	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(Select All)
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 1 - Demographics, Pay Rates and Taxes
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 2 - Scheduled Earnings and Deductions
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 3 - Dates and HR [Edit Visibility]
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 4 - Percentage Labor Distribution
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 5 - 3rd Party Payees
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 6 - Accrual Information
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 7 - Employee Photo
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 8 - Custom Fields [Edit Visibility]
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 9 - Employee Self-Service
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 10 - Time and Attendance
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 11 - Direct Deposit
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 12 - Year-to-Date Totals
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 13 - Employee Benefits
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 14 - Dependents and Beneficiaries
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 15 - Documents
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 16 - Checklists
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 17 - W-2 Data
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 20 - Performance and Compensation History
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Form 21 - Learning

- **Make Employee Changes:** Allows you to designate each form as No Access, Read Only or Edit.
- **View Today's Changes:** Enable this permission to provide users access to the Today's Changes page on the Main Menu to view changes for their employees. *This permission will respect Hide Rates/Taxes and the Sensitive Fields permission.*



- **Hide Rate/Taxes on Forms:** Hides rates of pay on employee forms only. This does not remove pay rates on HR or Payroll Reports.
- **Hide Form 3 Birth Year and Age:** Removes visibility for birth year and age on employee forms. This does not remove birth year or age on HR or advanced reports.
- **Employee Change Comments:** Grants the user access to enter comments on changes to the employee record.
- **Can Override Position Defaults:** Allows the user to override defaults associated with the position the employee fills.
- **Override Cascading Labor Allocation:** Allows the user to override subsequent categories for a labor allocation.
- **Allow ESS View as Employee:** Allows the user to log into Employee Self-Service® as the employee to view it with their permissions. While logged in as the employee, no edits can be made and the employee may also be logged in at the same time as the user.

Set Up Employees

Creating a New Hire Template

Auto-Generate Badge Numbers

Self-Onboarding

Email Invitation

Welcome Message

Personal Information

Documents

Inviting an Employee to Complete Self-Onboarding

Batch Send Self-Onboarding Invitations

Monitoring Self-Onboarding Progress

Employee View

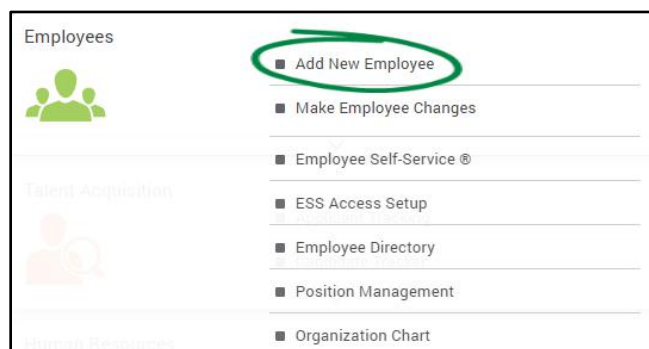


Set Up Employees

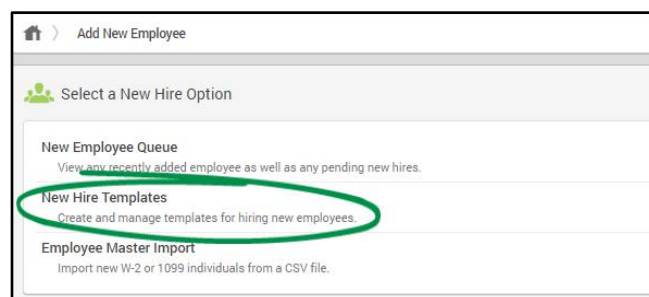
Creating a New Hire Template

Creating New Hire Templates allow you to ensure a uniform hiring process among different types of employees. For example, let's say you have both part-time and full-time employees. Do these groups of employees get different documents, clock in and out differently, or have various benefit offerings? Through New Hire Templates, you can hide specific fields applicable only to certain groups of employees.

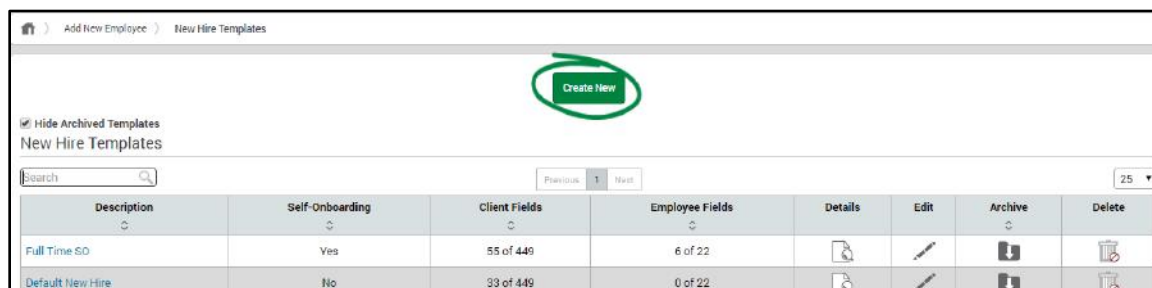
First, click "Add New Employee" from the Employees tile.



Then, click "New Hire Templates."



Any templates you previously created will display on the New Hire Templates screen. To set up a new template, click "Create New."





Next, provide a name for your template. When finished, click “Add.”

Under the Employer Side tab, go through each of the eight options and choose which information should be included on the template.

Information under the Included Fields box will display on the template. Use the gear icons to set default fields to populate automatically. For example, if you only have one location, you can set the employee’s work address as a default and it will prepopulate for you.

When finished, click “Update.”



Auto-Generate Badge Numbers

Phone numbers, dates, passwords — with all the different numbers we have to remember, trying to remember the last badge number you assigned off the top of your head is a nearly impossible task. By auto-generating badge numbers, you don't need to remember the last badge number you assigned as Paycom will track and generate each employee's badge number automatically.

To do this, click the HR Information tab. Then, from the Available Fields section, check the box for "Badge Number" to add the Badge Number field to your New Hire Template(s).

Once added, the Badge Number field will display in the Included Fields section. Click the gear icon to review its settings.



Select the appropriate option for assignment of badge numbers. Options available for selection are:

- **Manual:** If selected, you must manually enter each employee's badge number into Paycom.
- **Auto:** If selected, Paycom will assign employee badge numbers automatically.

The screenshot shows a modal titled 'Included Fields' with a search bar and a list of fields: 'Badge Number', 'ACA Initial Status', and 'Workers Comp Code'. A settings icon for 'Badge Number' is clicked, opening a dropdown menu. The dropdown has the title 'Assign Badge Number' and two radio button options: 'Manual' and 'Auto'. The 'Auto' option is circled in green. There are 'Cancel' and 'Update' buttons at the bottom of the dropdown.

If you choose to have Paycom to assign badge numbers automatically, use the Auto-Assign drop-down menu to select how you want badge numbers assigned. Options available for selection include:

- **Use Last 4 of SSN:** If selected, Paycom will assign the last four digits of the new hire's Social Security number as their badge number. *An alert will display if the last four digits of the new hire's Social Security number match the badge number of an existing employee.*
- **Incrementing:** If selected, Paycom will assign badge numbers in sequential order. If you want badge numbers assigned starting with a specific number, such as 00001, enter it in the Start With field. Check the box for "Back Fill" to reuse badge numbers that are no longer in use. *Incrementing badge numbers can be up to 12 digits.*

When finished, click "Update" to save your changes.

This screenshot shows the 'Included Fields' modal with the 'Assign Badge Number' dropdown set to 'Auto'. Below this, the 'Auto-Assign Method' dropdown is set to 'Incrementing'. The 'Start With' field contains '000001'. The 'Back Fill' checkbox is checked. The 'Update' button at the bottom right is circled in green.



On Step 7: HR Information of the New Hire Guided Setup, the new hire's auto-generated badge number will display within the Time and Attendance tab based on the settings determined in the New Hire Template.

The screenshot shows the 'New Hire Guided Setup' interface. At the top, there is a breadcrumb trail: 'Add New Employee > New Employee Queue > New Hire Guided Setup'. Below this is a progress bar with seven steps: 1. Personal Information, 2. Work Information, 3. Supervisors, 4. Pay Information, 5. Paycheck Deposit, 6. Taxes, and 7. HR Information. The 'HR Information' step is currently active. Under 'HR Information', there are five tabs: 'Employee Self Service' (with a red '2'), 'Time and Attendance' (selected), 'Documents' (with a red '1'), 'Benefits and ACA' (with a red '1'), and 'Other' (with a red '1'). In the 'Time and Attendance' tab, the 'Badge Number' field is highlighted with a green circle and contains the value '00001'. To the right of the field is a checkmark and the text 'Numeric character only'. At the bottom of the form, there are three buttons: 'Previous', 'Save', and 'Complete'.



Include on New Hire Report

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA) requires all employers to report new hire data, such as the employee's name, address and Social Security number, to a designated state agency. Add the Include on New Hire Report field in your new hire template(s) and set a default selection to ensure new hires are included in new hire reporting.

To do this, click the "Work Information" tab. Then, from the Available Fields section, check the box for "Include on New Hire Report" to add the field to your new hire template(s).

Home > Add New Employee > New Hire Templates > Template Fields for New Hires

Add Template

The new hire template allows you to add and/or require certain fields during the new hire process. Access to individual fields can be further restricted by user's access permissions.

Description *

Enable Self-Onboarding ☒ Yes ☐ No

Employer Side **Employee Side**

1. Personal Information

2. Work Information

3. Supervisors

4. Pay Information

5. Paycheck Deposit

6. Taxes

7. HR Information

8. Custom Fields

Available Fields

☐ Select All

☒ Include on New Hire Report

Show Selected Fields Only



Once added, the field will display in the Included Fields section. Click the gear icon to set a default value.

The screenshot shows the 'Add Template' interface. On the left, there's a sidebar with categories like '1. Personal Information', '2. Work Information', etc. The main area is divided into 'Available Fields' and 'Included Fields'. In the 'Included Fields' section, the 'Include on New Hire Report' field has a gear icon circled in green, indicating it can be configured.

Select "Include" or "Exclude" from the Default Value drop-down menu and click "Update" to save your changes.

This screenshot shows the same 'Add Template' page, but with a dropdown menu open for the 'Include on New Hire Report' field. The dropdown shows 'Default Value' set to 'Include' and an 'Update' button. The gear icon from the previous screenshot is still present, and the dropdown is highlighted with a green circle.



When adding a new employee to Paycom, the Include on New Hire Report field will display within Step 2: Work Information. If “Include” is set as the default value, the box for “Include on New Hire Report” will be checked to ensure the appropriate employees are automatically included in the next new hire reporting period.

The screenshot shows the 'New Hire Guided Setup' form in Paycom, specifically the 'Work Information' step for an employee named 'Roberts, Ally'. The form has a progress bar at the top with seven steps: 1. Personal Information, 2. Work Information (current), 3. Supervisors, 4. Pay Information, 5. Paycheck Deposit, 6. Taxes, and 7. HR Information. Below the progress bar, the title 'Work Information (Roberts, Ally)' is displayed. A red asterisk indicates a required field. The 'Employee Status' is set to 'ACTIVE'. The 'Include on New Hire Report' checkbox is checked and circled in green. Other fields include 'Hire Date' (12/14/2020), 'Previous Termination Date' (00/00/0000), 'Rehire Date' (00/00/0000), 'Seniority Date' (00/00/0000), and 'Termination Date' (00/00/0000). A 'Pre-hire' checkbox is also present.

Field	Value
Employee Status	ACTIVE
Include on New Hire Report	<input checked="" type="checkbox"/>
Hire Date	12/14/2020
Previous Termination Date	00/00/0000
Rehire Date	00/00/0000
Seniority Date	00/00/0000
Termination Date	00/00/0000



Self-Onboarding

Customization for your onboarding process is easier than ever with our Self-Onboarding option. Empower your employees to begin their first day feeling confident, knowledgeable and engaged with Paycom's Self-Onboarding. Need personal information not requested in the application from your new employees? You no longer have to wait for the employee's first day or navigate various communication channels, such as email, to gather information.

To set up Self-Onboarding, first select "Yes" for "Enable Self-Onboarding" in your New Hire Templates.

The screenshot shows the 'Add Template' form in Paycom. The 'Description' field is set to 'Seasonal'. The 'Enable Self-Onboarding' checkbox is checked, and the 'Yes' radio button is selected. The 'Employee Side' tab is highlighted.

After "Yes" is selected, the Employee Side tab will be made available to you. Here you will determine what information is included in the employee's guided flow, such as your welcome video, a message from your CEO, or any other details about your company's specific onboarding process.

We'll go through in detail how to set up the Employee Side information in each tab.

The screenshot shows the 'Add Template' form in Paycom, with the 'Employee Side' tab selected. The 'Email Invitation' sub-tab is selected, showing fields for 'Subject Line', 'Dynamic Fields', 'Reply To Email Address', and 'Reset Template'.



Email Invitation

The Email Invitation tab allows you to create a customized welcome email, inviting your employees to begin the Self-Onboarding process.

The screenshot displays the 'Email Invitation' tab in the Paycom system. On the left, there's a sidebar with 'Email Invitation' selected. The main area contains fields for 'Subject Line' (pre-filled with 'Welcome to Paycom, if left blank'), 'Reply To Email Address' (pre-filled with 'mandymadden@paycomonline.com'), and 'Dynamic Fields' (showing 'New Hire Name' with an 'Add' button). Below these is a rich text editor with a toolbar. The preview of the email shows a green banner with the Paycom logo and 'Welcome to Paycom'. The body text starts with 'Hi {New Hire Name}', followed by a paragraph explaining the onboarding process and app download instructions. It includes 'Download on the App Store' and 'Get it on Google play' buttons. A large green 'START' button is centered. The email concludes with 'Welcome aboard', '— The Paycom Team', and a P.S. note about the URL, which is represented by a placeholder '{Invitation Url}'.

- **Subject Line:** Use this field to enter a custom subject line for the email. If left blank, it will default to "Welcome to Paycom."



- **Reply to Email Address:** A reply-to email address is required to allow employees to respond to the invitation email. As a best practice, it is recommended that the reply-to email address leads to the person named as the company representative and responsible for the employee onboarding experience.
- **Dynamic Fields:** Use the drop-down menu to select the dynamic fields you would like to include in your email.
- **Reset Template:** Clicking “Reset” will discard any changes you have made and reset the email back to the Paycom default template.

When finished, click “Update.”

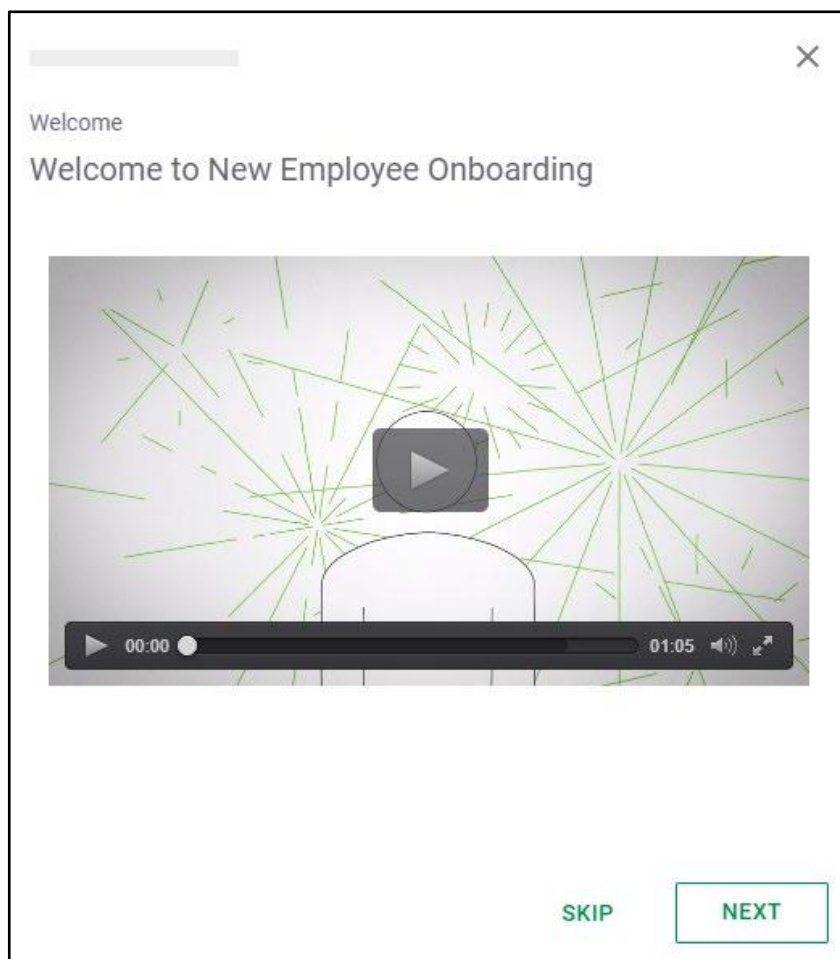
Welcome Message

Through welcome messages, you can add multiple videos, images or text-only messages for your new hires to view. For example, if you wanted to include a welcome message from your CEO and a map showing new hires where to park on their first day, you can!

Check the box next to “Include Paycom default video” to include our default welcome video that explains how to complete Self-Onboarding.



Below is an example of what the Paycom default video looks like for employees.





To add a custom video or text-only message, click “Add Message.” The following pop-up will display allowing you to create your custom message.

- **Title:** Enter a title for your welcome message. Keep in mind, employees will be able to see this title.
- **Display Media:** Determine whether you would like to display a video or image to go along with this message.
- **Media Source:** Use the drop-down menu to select whether you want to include an image, video or web video. Please note: Images are limited to 5MB in size and must be in PNG, JPEG, JPG or GIF formats. Video files are limited to 100 MB in size and must be MP4 files with H.264 encoding.
- **Dynamic Fields:** Use the drop-down menu to select dynamic fields to include in your customized message.

When finished, click “Add.”



If needed, click and drag to re-arrange the order your welcome messages will appear. When finished, click “Update.”

Home > Add New Employee > New Hire Templates > Template Fields for New Hires

Add Template

The new hire template allows you to add and/or require certain fields during the new hire process. Access to individual fields can be further restricted with the use of new hire access profiles. Access to new hire templates can be granted in the user's access permissions.

Description *

Enable Self-Onboarding ? ☒ Yes ☐ No

Employer Side **Employee Side**

Email Invitation

Welcome Message

Personal Info

Documents

☒ Include Paycom default video

1

Paycom Default Video

✕

2

Welcome to Paycom University

✕



Personal Information

Through Self-Onboarding, employees will type in their own information through a guided flow, reducing the number of secondhand entry errors and providing additional comfort knowing they are in control of their personal data.

On the Personal Info tab, use the Available Fields box to choose the information you want your employees to provide during Self-Onboarding. All the information in the Included Fields box will display to employees.

Employee Name, Employee Photo and Language fields are defaulted as Included Fields and cannot be removed.

You will notice that some of the fields in the Included Fields box have a drop-down menu. Use this drop-down menu to determine whether the specific field should be Read Only or Editable. Some fields, such as Direct Deposit Setup, have the option to mark as "Required."

Add Template

The new hire template allows you to add and/or require certain fields during the new hire process. Access to individual fields can be further restricted with the use of new hire access profiles. Access to new hire templates can be granted in the user's access permissions.

Description * Seasonal

Enable Self-Onboarding ☒ Yes ☐ No

Employer Side **Employee Side**

Personal Info

Available Fields

Search

☒ Employee Name
☒ Employee Photo
☒ Language
☐ Nickname
☒ ESS Login Credentials
☐ Home Address
☐ SSN/EIN
☐ Birth Date
☒ Gender
☐ Marital Status
[Show Selected Fields Only](#)

Included Fields

Search

Employee Name Read Only

Employee Photo Read Only

Language English

ESS Login Credentials Editable

Gender

Primary Phone



To help ensure timely completion of Form I-9, you have the ability to include Form I-9 Section 1 in Self-Onboarding. To do this, check the box for Employment Verification (Form I-9). *This field will only display if you have Documents and Checklists enabled.*

If included, the Employment Verification (Form I-9) field will display within the Documents section of Self-Onboarding. Once Self-Onboarding is complete and you convert the new hire record to an employee record, the completed Form I-9 will be associated with a system checklist. Regular system checklists permissions will kick in, allowing you to complete Form I-9 Section 2 or send the employee a Form I-9 Section 1 correction, if necessary.

Examples of information an employee cannot complete through Self-Onboarding include but are not limited to:

- Employee Code
- Work Information
- Supervisors
- Pay Information
- HR Information

When finished, click "Update."



Documents

From the Documents tab, add each document you would like your employees to complete during the Self-Onboarding process. This can include government documents, such as the Form W-4, as well as any company-specific documents you would like to include.

Documents must be set up in Documents and Checklists to be added to Self-Onboarding.

To add a new document, click “Add Document.”

Home > Add New Employee > New Hire Templates > Template Fields for New Hires

Add Template

The new hire template allows you to add and/or require certain fields during the new hire process. Access to individual fields can be further restricted with the use of new hire access profiles. Access to new hire templates can be granted in the user's access permissions.

Description * Seasonal

Enable Self-Onboarding ☒ Yes ☐ No

Employer Side Employee Side

Email Invitation

Welcome Message

Personal Info

Documents

If the employee is allowed to setup taxes and direct deposit, then the federal W4 and a direct deposit authorization form will be presented to the employee in the document section. Those documents will come before any user-added documents.

Add Document

Documents

Search

	1 Employee Handbook	
	2 Dress Code	
	3 2 forms of ID	

Return Update



The following pop-up window will display. Use the drop-down menu to select the document you want to include and click "Add."

Each document added will display in the Documents tab. If needed, click and drag to rearrange the order the documents will display.

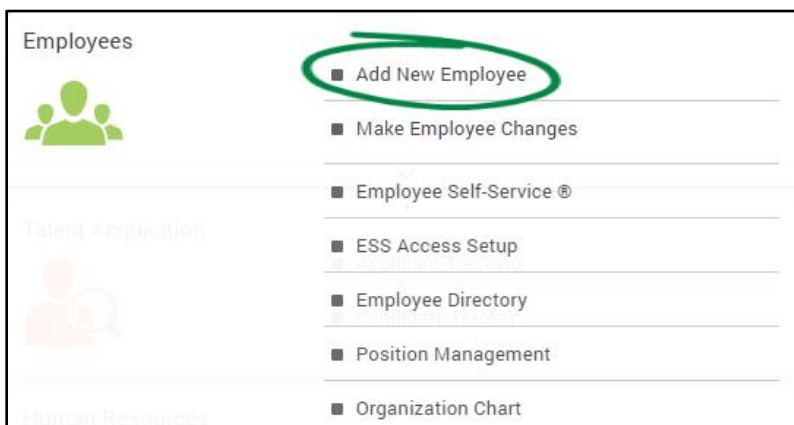
If the employee is allowed to set up taxes and direct deposit, then the Form W-4 and a direct deposit authorization form will be presented to the employee in the document section. Those documents will come before any user-added documents.

When finished, click "Update."

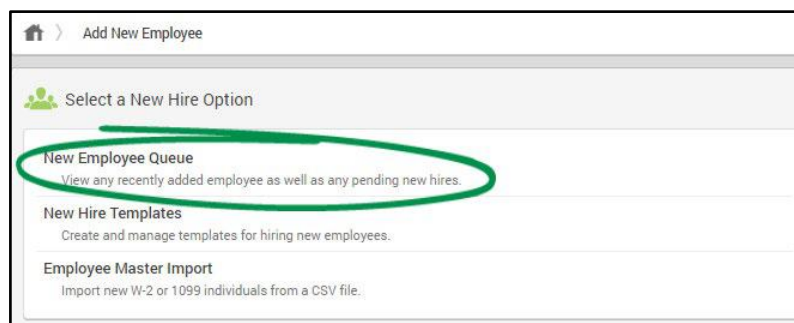


Inviting an Employee to Complete Self-Onboarding

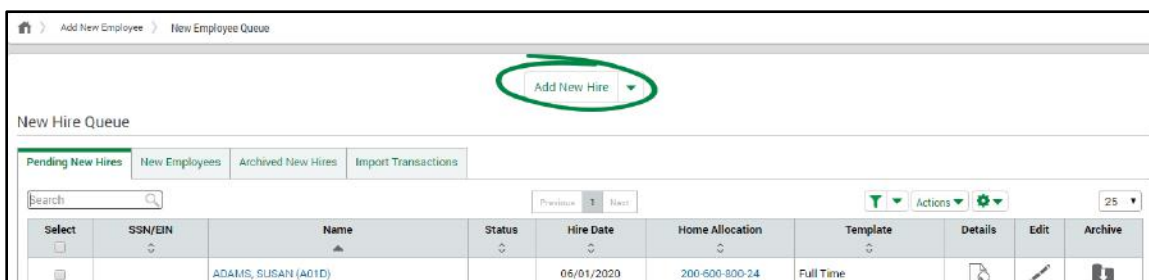
From the Employees tile, click “Add New Employee.”



Then, click “New Employee Queue.”



To add a new employee, click “Add New Hire.”





Select the appropriate New Hire Template with Self-Onboarding enabled. Then, fill out a few simple details, such as the employee's name, email and phone number. To send the employee your Self-Onboarding email invitation, select "Create and Send Invitation."

The screenshot shows the 'Create New Hire' window with the following fields and values:

- New Hire Template:** Self-Onboarding (dropdown)
- Employee Type (W2/1099):** W2 (selected), 1099
- Position Seat:** Assign (button)
- Work Location:** Corporate Headquarters (dropdown)
- Employee Name:** Lorraine, Savage (text inputs)
- Personal Email:** lorrainesavage@paycom.com (text input)
- Primary Phone:** 405 - 555 - 1111 (text input)
- Buttons:** Cancel, Create and Send Invitation (circled in green), and a dropdown arrow.

Batch Send Self-Onboarding Invitations

To batch send Self-Onboarding invitations, select your Self-Onboarding New Hire Template and enter the required fields in the Create New Hire pop-up window. When finished, select "Create New Hire Only" from the drop-down menu.

This screenshot is identical to the one above, but the dropdown menu is open, showing the option 'Create New Hire Only' which is circled in green.

The fields and values are the same as in the previous screenshot:

- New Hire Template:** Self-Onboarding (dropdown)
- Employee Type (W2/1099):** W2 (selected), 1099
- Position Seat:** Assign (button)
- Work Location:** Corporate Headquarters (dropdown)
- Employee Name:** Lorraine, Savage (text inputs)
- Personal Email:** lorrainesavage@paycom.com (text input)
- Primary Phone:** 405 - 555 - 1111 (text input)
- Buttons:** Cancel, Create and Send Invitation, and a dropdown menu with 'Create New Hire Only' selected (circled in green).



Each new hire created will display within the Pending New Hires tab. When you're ready to send the Self-Onboarding invitations, check the box next to each employee's name and select "Batch Send Invitations" from the Actions drop-down menu.

The screenshot shows the 'New Hire Queue' interface with the 'Pending New Hires' tab selected. A search bar indicates '3 records selected'. The table lists three employees: ADAMS, FRANK KEITH (A01J), ADAMS, SALLY JANE (A01P), and CAVALCANTI, AMANDA (A01K). The 'Actions' dropdown menu is open, and 'Batch Send Invitations' is highlighted.

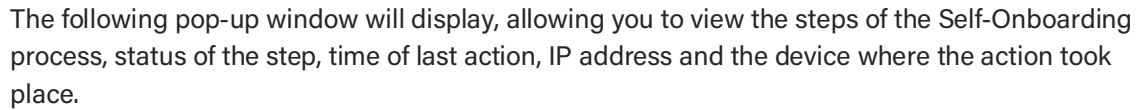
Select	SSN/EIN	Name	Status	Hire Date	Home Allocation	Actions	Details	Edit	Archive
<input checked="" type="checkbox"/>		ADAMS, FRANK KEITH (A01J)				Batch Edit Templates Batch Reassign Batch Send Invitations Batch Hire Batch Archive Self-Onboarding			
<input checked="" type="checkbox"/>		ADAMS, SALLY JANE (A01P)							
<input checked="" type="checkbox"/>		CAVALCANTI, AMANDA (A01K)							

Monitoring Self-Onboarding Progress

After the Self-Onboarding invitation is sent to the employee, you can view the employee's Self-Onboarding progress from the New Hire Queue by clicking the Details icon.

The screenshot shows the 'New Hire Queue' interface with the 'Pending New Hires' tab selected. The table lists two employees: ADAMS, FRANK KEITH (A01J) and ADAMS, SALLY JANE (A01P). The 'Details' icon for the first employee is highlighted.

Select	SSN/EIN	Name	Status	Hire Date	Home Allocation	Template	Details	Edit	Archive
<input type="checkbox"/>		ADAMS, FRANK KEITH (A01J)				Self-Onboarding			
<input type="checkbox"/>		ADAMS, SALLY JANE (A01P)				Self-Onboarding			



Clicking the Onboarding Settings header will expand the section and allow you to view more options.

[Back to TOC](#)



- **Access:** You may reset the process if you need a new hire to start over. This resets the Social Security number and Date of Birth initial authentication step, as well.
- **Cancel Process:** If you need to cancel the process, you can do so by clicking “Cancel.” Restart the process by sending a new invitation at any time.
- **Personal Email:** If you need to send the invitation to a different email, click “Change Email.”
- **Send Invitation:** If anything has been changed or the previous invitation has expired, click “Send Invitation” to send a new invitation to the employee.
- **Invitation URL:** This shows the link that was sent to the employee, the date and time sent, when the link expires, and the option to cancel the link.

After the employee completes their portion of the Self-Onboarding process, you must navigate to the New Hire Queue and finalize the process by entering the information the employee is unable to submit, such as HR and pay details.

Information the employee entered during Self-Onboarding will display in gray fields and cannot be edited.



Employee View

After clicking “Create and Send Invitation” from the New Hire Template, employees will receive your company’s email invitation. Clicking “Start” will take the employee to the Self-Onboarding web page.


The screenshot shows an email invitation from Paycom. At the top is a banner with a forest background, the Paycom logo, and the text "Welcome to Paycom". Below the banner, it says "Hi Lorraine Savage". The main body of the email states: "Mandy Madden at PAYCOM UNIVERSITY has invited you to begin your new employee onboarding process through Paycom's Employee Self-Service ®. If you have not already done so, please download the Paycom app on your mobile device." Below this text are two buttons: "Download on the App Store" and "Get it on Google play". Underneath these buttons, it says "Once you've installed the app, please click the button below to begin your new employee onboarding process". A green button labeled "START" is shown, with a green circle and arrow highlighting it. Below the button, it says: "If you have any questions or feedback about the process, you can reply to this email to contact your onboarding representative at PAYCOM UNIVERSITY. If you don't have a mobile device, you can start this process from a computer with the latest version of any modern browser." The email concludes with "Welcome aboard," and "-- The Paycom Team". A postscript (P.S.) says: "If you're having trouble with the button above, try pasting the URL below into your web browser." followed by the URL: <https://www.paycomonline.net/v4/ee/web.php/onboard/verify?token=YWFjY2EzZmYxNWY0NzFiNTRjZTY2Mjk3NThiMWMxZTA=>



For security purposes, employees will be prompted to verify their phone number to log in and begin Self-Onboarding.

Verification

Please take a moment to verify your phone number.



When verifying, message & data rates may apply.

Phone Number

(***) *** - 1111

SEND

After phone number verification, the employee can choose whether to view the Self-Onboarding web page in English or Spanish.

Language

Please select a language

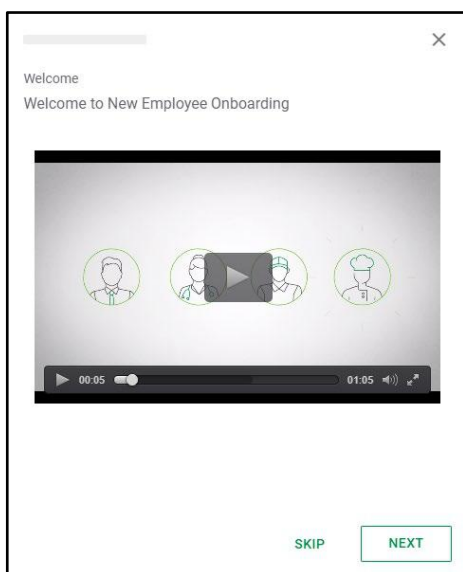
☒ English

☐ Spanish

NEXT



Next, the welcome messages you created will display. If you chose to include Paycom's default video, it will display first. Then, any welcome messages you included will display in the order you set.



After employees view your welcome messages, they will be asked to set their Employee Self-Service® username, password and security questions. By clicking the arrow next to Username, employees can decide whether they would like their username to be their personal email, the default username, or an alternate email.

Credentials

What would you like to set for your username and password?

Username *

Alternate Email ▼

Alternative Email

lorrainesavage@paycom.com

Password *

Confirm Password *

Password Strength

SAVE AND EXIT NEXT

Credentials

What would you like to set for your security questions?

Question 1

Library card number? ▼

Answer *

02292020

Question 2

Primary frequent flyer number? ▼

Answer *

L8765B0

Question 3

Middle name of youngest sibling? ▼

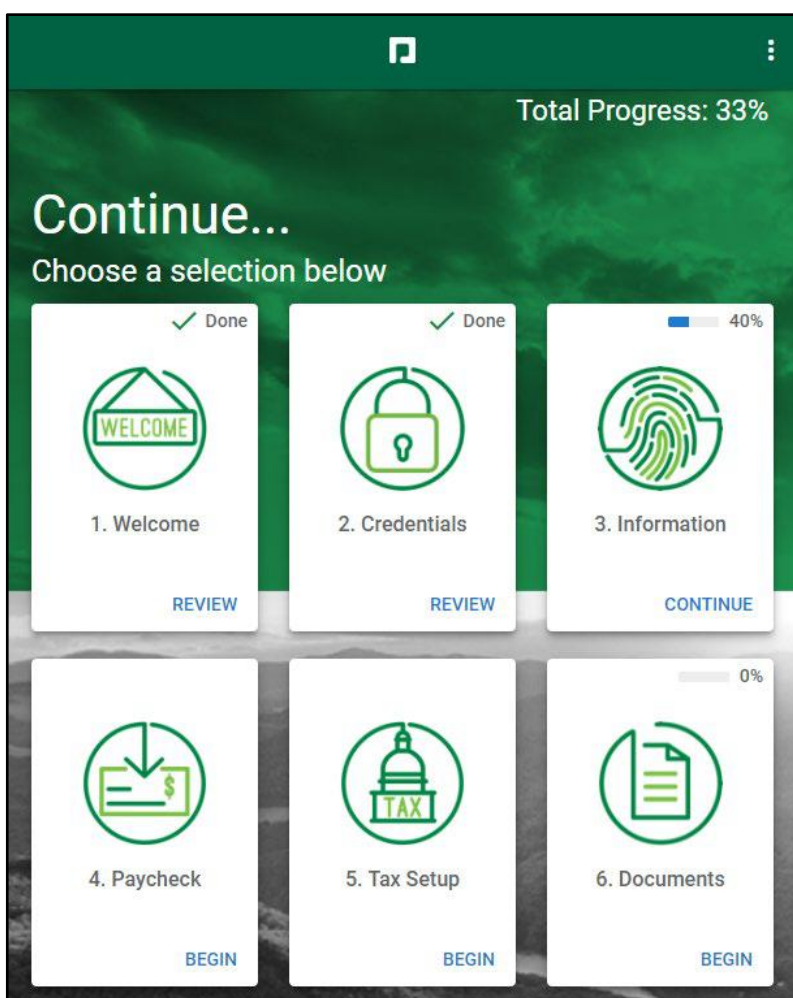
Answer *

Dougherty



From the Self-Onboarding menu, employees can easily see which sections they have completed. Clicking “Review” will allow employees to review the information they entered and make edits if necessary. The Total Progress bar at the top of the screen provides employees with an estimate of how far along they are in the Self-Onboarding process.

Any section that is incomplete will have a progress bar at the top of the tile. This helps notify employees how far along they are from completing that specific section.





The tasks in the Information tile will ask employees to enter in their personal information, such as address, phone number and emergency contacts.

<

×

Information

Who is your first Emergency Contact?

Emergency Contact Name

Brian Smith

Emergency Phone Number

(405) 123-4567

Relationship to the Employee

Spouse

SAVE AND EXIT

NEXT

If Direct Deposit Setup was included in the Personal Info section of the New Hire Template, employees will be able to use the Paycheck tile to submit their direct deposit information.

<

×

Paycheck

Enter your bank account information for your first account

Bank Name

ABC Bank of OK

Routing Number

000000000

Account Number

000000000000

Confirm Account Number

000000000000

Account Type

☒ Checking

☐ Savings

SAVE AND EXIT

NEXT



If Tax Setup was included in the Personal Info section of the New Hire Template, employees will be able to use the Tax Setup tile to submit federal and state tax information.

Tax Setup

Please answer a few questions about your Federal Tax setup

[View Legal Notice >](#)

Federal Filing Status *

Married

Number of Federal Allowances *

0

Additional Amount to Withhold

25.00

External Resources

[Form W-4 Worksheet](#)

[IRS Withholding Calculator](#)

SAVE AND EXIT NEXT

Tax Setup

Sign and acknowledge your W-4 Form

Select a signature method below

Signature Method:

☐ Handwritten

☒ Type in

Your Name:

Lorraine Savage

Font:

Alex Brush

Preview:

Lorraine Savage

SAVE AND EXIT FINISH

Finally, the tasks in the Documents tile will prompt employees to complete all the documents you included in Self-Onboarding. Documents will display in the order you determined in the Self-Onboarding setup.

Documents

Please review or upload the following documents and sign as needed

USCIS Form I-9

2020 Form W-4

SAVE AND EXIT NEXT



Read-only and online-editable documents can be completed directly through the Self-Onboarding web page.

Editable documents will require the employee to download the document, complete the information and upload it.

Once all of the sections are complete, employees will click the "Complete" button at the top of the page to finalize their portion of Self-Onboarding. A banner will display at the top of the page confirming Self-Onboarding is complete.

Once employees click "Complete" to finalize their portion of Self-Onboarding, they cannot go back and edit any information.

Manage Employees

New Hire Guided Setup

Step 1: Personal Information

Step 2: Work Information

Step 3: Supervisors

Step 4: Pay Information

Step 5: Paycheck Deposit

Step 6: Taxes

Step 7: HR Information

Step 8: Custom Fields

New Hire Batch Actions

New Hire Import

Make Employee Changes

Advanced Filters

Employee Menu

Employee Directory

Employee Change Import (EMI02)

Creating the Import

Importing the File

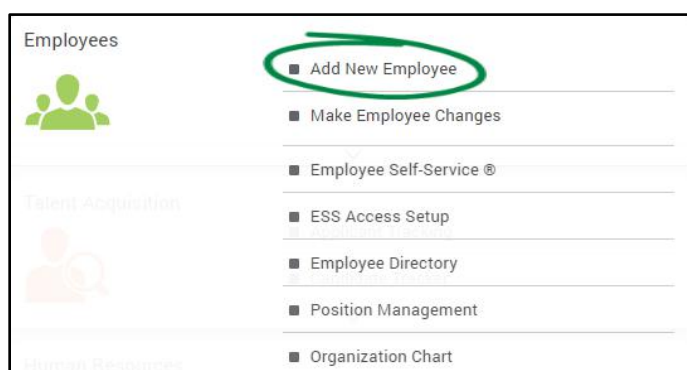
Tax Code Geolocation Import



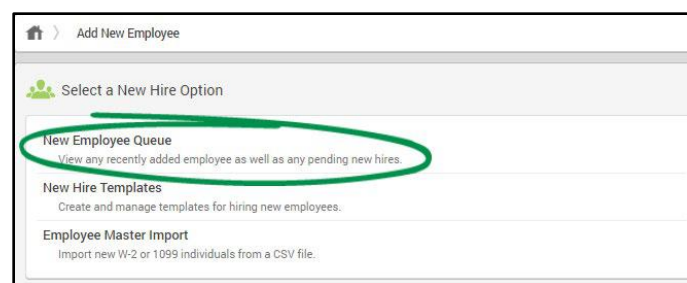
Manage Employees

New Hire Guided Setup

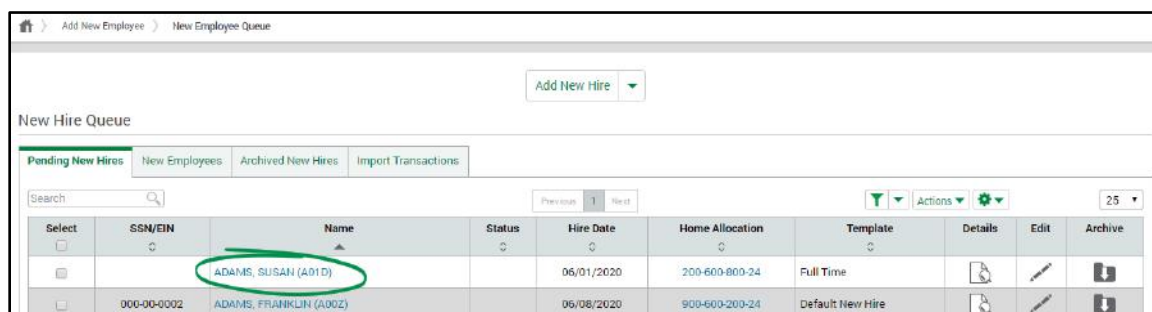
First, from the Employees tile, click “Add New Employee.”



Then, click “New Employee Queue.”



To enter the New Hire Guided Setup and complete the new hire process, click the name of an employee who has completed Self-Onboarding.





When you enter the New Hire Guided Setup, the selected template will determine which tabs and fields appear. The information is divided into multiple logical steps. Only complete the fields that the employee does not have access to. All other fields will be populated when the employee completes Self-Onboarding.

Step 1: Personal Information

On Step 1: Personal Information, you'll see the employee's basic information, such as name and address. Fields that have been entered by the employee during Self-Onboarding will be gray and read-only.

The employee's code will generate in sequential order automatically in the New Employee Code field.

1. Personal Information 2. Work Information 3. Supervisors 4. Pay Information 5. Paycheck Deposit 6. Taxes 7. HR Information 8. Custom Fields

Any fields that were made available to the new hire in the self-onboarding process have been disabled until the new hire completes the process. The new hire will not be able to be hired until the onboarding process is completed or cancelled.
[Click here to view the new hire process](#)

Personal Information (Adams, Susan)

New Employee Code ☐ Override Auto-generated EE Code

Employee Name

Nickname

Social Security Number ☐ Applied For

Address

City, State, Zip

Primary Phone

Secondary Phone

Valid image formats

If you want to enter the employee code manually, check the box for "Override Auto-generated EE Code." The New Employee Code field will become editable for you to enter the desired code.

Personal Information (Adams, Susan)

* New Employee Code ☒ Override Auto-generated EE Code

Employee Name

Nickname



If you employ an individual without a Social Security number, such as a non-resident alien, you can indicate the employee has applied for a Social Security number. To do this, check the “Applied For” box next to the Social Security Number field. Paycom will generate a temporary identification number, starting with 000-00-0000 that will serve as a placeholder until the employee receives their Social Security number.

The Applied For check box will only display for W-2 employees.

Home > Add New Employee > New Employee Queue > New Hire Guided Setup

1. Personal Information 2. Work Information 3. Supervisors 4. Pay Information 5. Paycheck Deposit

Personal Information (Adams, Susan)

New Employee Code ⓘ A01D
☐ Override Auto-generated EE Code ⓘ

Employee Name: Susan Middle Name: Adams

Nickname: Nickname

Social Security Number * - - ☒ Applied For ⓘ

Address * 123 Pink Street

Upon checking the “Applied For” box, a pop-up alert will display to inform you the employee will be excluded from tax return filing until their Social Security number is updated.

Alert [X]

Marking this W2 employee as "Applied for SSN" may result in the employee being excluded when filing tax returns due to the filing requirements. Once the SSN is received please update the employee's record. For any questions, please contact your Paycom Specialist.

OK



Step 2: Work Information

On Step 2: Work Information, enter the employee's job information, including the hire date as well as labor allocation information.

The employee's Standard Occupational Classification (SOC) code can be entered, allowing you to conveniently add your new employee's SOC code when entering the employee in Paycom. For the SOC Code field to display, you must add the field to your New Hire Template(s).

The screenshot shows the 'Work Information' step in a guided setup process. The breadcrumb trail at the top reads: 'Add New Employee > New Employee Queue > New Hire Guided Setup'. The step navigation bar shows steps 1 through 8, with '2. Work Information' currently selected. The form title is 'Work Information (Savage, Lorraine)'. A red asterisk indicates required fields. The fields and their values are: Hire Date (empty), SOC Code (empty), DOL Status (Full Time), Full Time Employment Factor (0.000000), Percent Labor Distribution (none), EEOC Category (Executive/Senior Level Officials and Managers), Position Seat (Chief Financial Officer - [No Employee Assigned] with an Assign button), Work Email (Work Email), Labor Allocation Profile (All), Home Department (Executive Management [800]), Home Locations (Kansas City [600]), Home Jobs (Executive [100]), Location (Houston), and System User (No, Current User, New User). At the bottom are 'Previous', 'Save', and 'Next' buttons.



When you add a 1099 employee, you can indicate whether the employee needs to be included on the New Hire Report. This is beneficial if you have 1099 employees who work in a state that requires you to report their earnings to government tax agencies.

To do this, indicate whether the 1099 employee should be included on the New Hire Report. Then, use the New Hire Reporting State drop-down menu to select the appropriate reporting state. Once you complete the New Hire Guided Setup and turn the employee Active, the employee will be included automatically in the New Hire Report for the selected state.

Home > Add New Employee > New Employee Queue > New Hire Guided Setup

1. Personal Information 2. Work Information 3. Supervisors 4. Pay Information 5. Paycheck Deposit 6. Taxes 7. HR Information

Work Information

* Indicates Required Field

Employee Status: ACTIVE

Include on New Hire Report: ☒ Yes ☐ No

New Hire Reporting State: FL

Hire Date: 02/13/2020 ☒ Pre-hire

Rehire Date: 00/00/0000

If you are using a custom new hire template that includes the System User field, you can create a Paycom user directly through the New Hire Guided Setup. Paycom users are individuals in your organization that need the ability to log into Paycom and accomplish tasks, such as approving time-off requests, processing payroll or managing employee benefits.

If the employee's role includes accomplishing tasks as a Paycom user and the employee is a current Paycom user, select "Current User." Then, use the Paycom User List drop-down menu to select the active Paycom user you want to tie to the employee.

System User: ☐ No ☒ Current User ☐ New User

Paycom User List: Search or Make Selection

Previous Save



If a new user needs to be created, select “New User” and enter the information required to create a new user.

When finished, click “Next.”

System User

☐ No ☐ Current User ☒ New User

Username *

Enter Password *

min 8 characters

Confirm Password *

min 8 characters

Advanced User

☐

Access Group *

Permission Profile *

Receive Email when payroll is submitted

☐

Receive Email when reports are put in CL inbox

☐

Phone Number

- - ext.

Valid Passwords

- 1. Passwords must be 8 to 20 characters in length.
- 2. Passwords must contain at least 1 number (0-9) OR at least 1 special character (!@#\$%^&*()-+=).
- 3. Passwords cannot contain quotes or apostrophes (" ' or ').
- 4. Passwords are case-sensitive. Please check the status of your Caps-Lock key before updating.

Previous

Save

Next

Back to TOC

Visit the Help Menu for the most up-to-date version of this guide.

Employee Management | 49



Step 3: Supervisors

On Step 3: Supervisors, assign the employee's supervisors and determine the appropriate Notification Settings.

Through Notification Settings, you can specify which supervisor should be notified of the employee's time-off requests, timecard approval, employee changes and exception points. To do this, click "Set Notifications."

In the Notifications pop-up window, check the box for each notification the various supervisors should receive and click "Save."



Step 4: Pay Information

On Step 4: Pay Information, select the appropriate pay details and add rates by allocation, if necessary.

When finished, click "Next."

Home > Add New Employee > New Employee Queue > New Hire Guided Setup

1. Personal Information > 2. Work Information > 3. Supervisors > 4. Pay Information > 5. Paycheck Deposit > 6. Taxes > 7. HR Information > 8. Custom Fields

Pay Information (Savage, Lorraine)

*** Indicates Required Field**

Processing Schedule *

Pay Frequency

Pay Type *

Pay Basis Check Display *

Paycode Profile

Auto Reduce Negative Check Group

Minimum Wage Profile

Exempt Status ☒ Exempt ☐ Non-Exempt

Salary * (\$0.00/hr)/(\$0.00/yr)

Scheduled Pay Period Hours

ABBR Calculation Rule

Rates By Allocation

Department Code	Description	Reg (DAR)	Daily OT (DRO)	Weekly OT (DRO)	Edit	Delete
No Records Found						



Step 5: Paycheck Deposit

On Step 5: Paycheck Deposit, select whether the employee will be paid via direct deposit or paper check.

If your employee selects “Direct Deposit,” they can choose to enable net pay and/or distributions. Selecting these options will allow them to enter their banking details.

When finished, click “Next.”



Step 6: Taxes

On Step 6: Taxes of the New Hire Guided Setup, Taxes by Geolocation will run automatically based on the employee's home address entered on Step 1: Personal Information and Work Location selected on Step 2: Work Information.

The Lives-in State, Works-in State, SUI Tax Agency, EE Loca Tax Agency and Client Local Tax Agency fields will autofill with the applicable tax information. Review the information and make any necessary changes. When finished, click "Next" to continue adding the new hire to Paycom.

If a state is missing from the Lives-in State, Works-in State or SUI Tax Agency drop-down menus, please contact your dedicated Paycom specialist.

Tax Information (Savage, Lorraine)

* Indicates Required Field

W2 or 1099 * ☒ W2 ☐ 1099

Non-Resident Alien ☐ Check this box if this employee is a non-resident alien.

Non-Resident Alien Withholding Adjustment ☐ Check this box if this employee should have additional Federal W/H.

Available Health Insurance ☐ Check this box to set 'YES' in New Hire Report. Required for employees in KY, MD, ND.

Employee Tax Setup

Look Up Potential Taxes

Lives-in State *

Works-in State *

SUI Tax Agency *

Register Local Taxes

Local Tax Validation Override ☐

EE Local Tax Agency 1 ☐ Resident Tax

Client Local Tax Agency 1 ☐ Resident Tax

	Filing Status	Exemptions / Allowances	Additional Amount	Additional Percent	Block
Federal Taxes	Single or Married filing separately <input type="button" value="v"/> <input type="checkbox"/> Multiple Jobs	Dependents \$ 0.00 Other Income \$ 0.00 Deductions \$ 0.00	\$ 0.00	0.0000 %	<input type="checkbox"/>
OK State Taxes	Married <input type="button" value="v"/>	0	\$ 0.00	0.0000 %	<input type="checkbox"/>



Step 7: HR Information

On Step 7: HR Information, make the appropriate selections within the Employee Self-Service®, Time and Attendance, Documents, Benefits and ACA, and Other tabs.

Home > Add New Employee > New Employee Queue > New Hire Guided Setup

1. Personal Information > 2. Work Information > 3. Supervisors > 4. Pay Information > 5. Paycheck Deposit > 6. Taxes > 7. HR Information > 8. Custom Fields

HR Information (Savage, Lorraine)

*Any fields that were made available to the new hire in the self-onboarding process have been disabled until the new hire completes the process. The new hire will not be able to be hired until the onboarding process is completed or cancelled.
Click here to view the new hire process*

Employee Self Service | Time and Attendance | Documents | Benefits and ACA | Other

* Indicates Required Field

ESS Access Profile Active EE

Checklist(s)

Search ☐ Select All

- ☐ Benefit Education
- ☐ Employee Transfer Notes
- ☐ FMLA Checklist
- ☐ Manager Promotion
- ☒ New Hire Checklist
- ☒ Off Boarding Checklist
- ☐ Year-End Employee Processes

Expense Management Class Search or Make Selection

Receive Expense Notifications ☐

Send ESS Login via Email Work Email ☐ Send Email

Previous Save Next



Step 8: Custom Fields

On Step 8: Custom Fields, view the employee's responses to your custom questions.

When finished, click "Complete" to hire the employee. To save the new employee for later review or completion by another user, click "Save."

If saved for later, the employee will display in the Pending New Hires tab.

Home > Add New Employee > New Employee Queue > New Hire Guided Setup

1. Personal Information > 2. Work Information > 3. Supervisors > 4. Pay Information > 5. Paycheck Deposit > 6. Taxes > 7. HR Information > 8. Custom Fields

i Any fields that were made available to the new hire in the self-onboarding process have been disabled until the new hire completes the process. The new hire will not be able to be hired until the onboarding process is completed or cancelled.
[Click here to view the new hire process](#)

Custom Fields (Savage, Lorraine)

Custom 1

Custom SELECT Fields

Shirt Size: Medium

Dietary Restrictions: None

Parent: Yes

Custom TEXT Fields

Drivers License:

Parking Pass #:

Custom DATE Fields

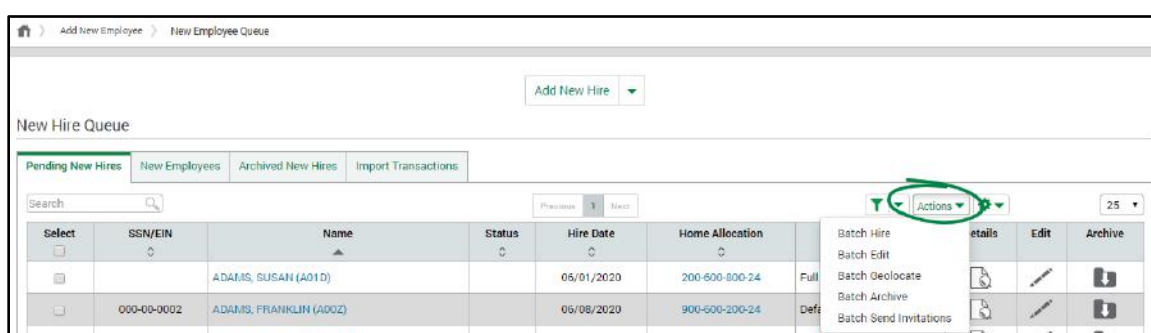
License Expiration: 00/00/0000

Previous Save Complete



New Hire Batch Actions

If you choose save an employee for later, they will display on the Pending New Hires tab. To make your hiring processes more efficient, you can batch hire, edit, geolocate and archive — all through the New Hire Queue. This is beneficial, for example, if you added 20 new hires to Paycom on Friday but don't want to make them active until Monday, as you can quickly batch hire all 20 employees directly from the Pending New Hires tab of the New Hire Queue.

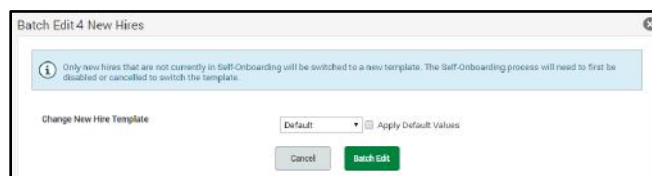


From the Actions drop-down menu, you can perform the following batch actions:

- **Batch Hire:** To batch hire multiple employees, check the box next to each employee's name and select "Batch Hire" from the Actions drop-down menu. A green banner will display to signify the selected employees were successfully hired. *If an employee is missing required information, such as birth date or hire date, you must include the required information before they can be hired.* Once the batch hiring process is complete, the hired employees will move from the Pending New Hires tab to the New Employees tab.
- **Batch Edit:** With the batch edit feature, you can switch new hires from one Custom New Hire Template to another in just a couple clicks. If most of the employee's information is complete — don't worry. Paycom will pull the applicable information into the new template. All you need to do is complete any additional fields. Check the box next to each employee's name and select "Batch Edit" from the Actions drop-down menu.

In the Batch Edit New Hires pop-up window, select the appropriate template. Each Custom New Hire template you've created, as well as the Paycom default will be available for selection. If you want to apply the default values set in the New Hire template, check the box for "Apply Default Values." When finished, click "Batch Edit."

Only new hires not currently in Self-Onboarding will be switched to the new template.





- **Batch Geolocate:** To batch run Taxes by Geolocation, check the box next to each employee's name and select "Batch Geolocate" from the Actions drop-down menu.
- **Batch Archive:** To batch archive multiple employees, check the box next to each employee's name and select "Batch Archive" from the Actions drop-down menu. When complete, the selected employees will move from the Pending New Hires tab to the Archived New Hires tab.
- **Batch Send Invitations:** This action allows you to batch send Self-Onboarding invitations. *For more information, please see the Batch Send Self-Onboarding Invitations section of this guide.*

On the Archived New Hires tab, you can recover or delete new hires.

- **Recover New Hire:** To batch recover multiple archived new hires, check the box next to each employee's name and select "Recover New Hire" from the Actions drop-down menu. Once complete, the selected new hires will move from the Archived New Hires tab to the Pending New Hires tab for you to complete the employee record.
- **Delete New Hire:** To batch delete multiple archived new hires from Paycom, check the box next to each employee's name and select "Delete New Hire" from the Actions drop-down menu.

The screenshot shows the 'New Hire Queue' interface with the 'Archived New Hires' tab selected. The table below lists the archived new hires. An 'Actions' dropdown menu is open, showing 'Recover New Hire' and 'Delete New Hire' options.

Select	SSN/EIN	Name	Status	Home Allocation	Default	Details	Delete
<input type="checkbox"/>		WRIGHT, MARY BETH		100	Default		
<input type="checkbox"/>	151-44-5474	WAZNIAK, MATT MATHEW		100	Default		



New Hire Import

The New Hire Import allows you to add multiple employees into Paycom at once using a simple import format. Once complete, imported data will save in the New Hire Queue so you can make edits before creating the employee record. This allows you to import new records and changes to existing records in multiple chunks. All you need to get started is the employee's Social Security number.

To access the New Hire Import, you must enable the New Hire Queue Import located within the Employees tab of Permission Profiles.

The New Hire Import allows you to import an employee master file directly into the New Hire Queue. To do this, select "Import New Hires" from the Add a New Hire drop-down menu.

The screenshot shows the 'New Hire Queue' interface. At the top, there's a breadcrumb trail: 'Add New Employee > New Employee Queue'. Below this, there's a section titled 'New Hire Queue' with a dropdown menu 'Add New Hire' and a button 'Import New Hires' (circled in green). Below the dropdown, there are tabs: 'Pending New Hires' (selected), 'New Employees', 'Archived New Hires', and 'Import Transactions'. A search bar is present. Below the search bar, there's a table with columns: 'Select', 'SSN/EIN', 'Name', 'Home Allocation', 'Template', 'Details', 'Edit', and 'Archive'. The table contains one entry for 'BAKER, KATE (KBRK)' with SSN/EIN '000-00-0002' and Template 'Default'. At the bottom, there's a pagination bar showing 'Showing 1 to 1 of 1 entries' and a 'Go to Page' field.

Select	SSN/EIN	Name	Home Allocation	Template	Details	Edit	Archive
<input type="checkbox"/>	000-00-0002	BAKER, KATE (KBRK)		Default			



Completing the New Hire Import is a three-step process. On Step 1: Import Properties, click the blue “Download” link to download a Microsoft Excel file containing detailed instructions and a list of acceptable header values Paycom will recognize automatically.

Then, select the appropriate Import Type and enter an Import Description.

New Hire Template drop-down menu contains the default New Hire Template, as well as any custom templates you’ve created. The template you select will be used to create records for employees who are not assigned a New Hire Template on the import file.

When finished, upload your completed import file and click “Next.”

Accepted file types are XLS, XLSX and CSV.



On Step 2: Column Mapping, Paycom will map the columns in the import file to the appropriate new hire fields automatically.

Validation errors will be highlighted in yellow. Errors will occur if your import file contains duplicate mappings or headers Paycom can't match to a specific field in the New Hire Guided Setup.

To fix these validation errors, select the appropriate field from the New Hire Field drop-down menu.

If the New Hire Field drop-down menu is blank, the data will be excluded from the import.

It's best practice to address any errors before continuing; however, errors will not cause the entire import file to fail. Instead, validated data will import successfully and any data that did not validate will record in Step 3: Review and Import.

You can only import fields you have access to view based on your New Hire Access Profile. Any fields you don't have permission to view will be recorded in Step 3: Review and Import.

Column Mapping

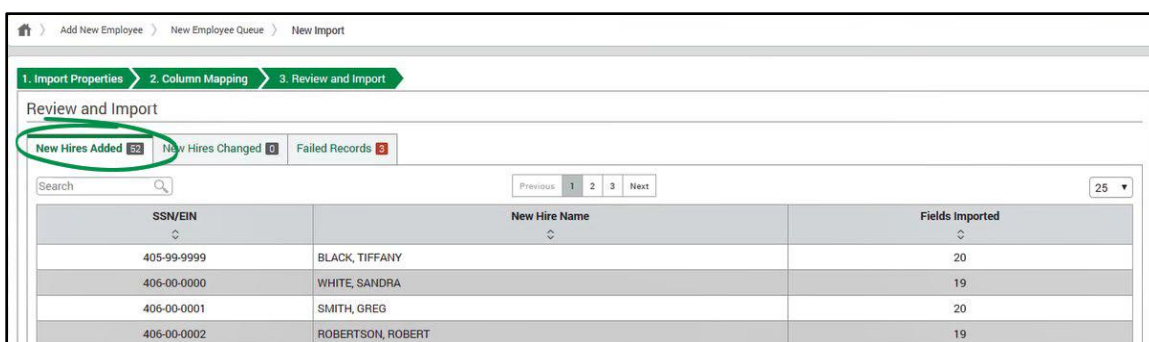
Column	Import Header	New Hire Field
1	Social Security Number	Social Security Number
2	Last Name	Last Name
3	First Name	First Name
4	Middle Name	Middle Name
5	Gender	Gender
6	Marital Status	Marital Status
7	Address	Address
8	City	City
9	State	State
10	Zip	Zip
11	Department	Search or Make Selection
12	Pay Type	Rate 1
13	Rate 1	Rate 1
14	Salary	Salary

This field is being mapped more than once.



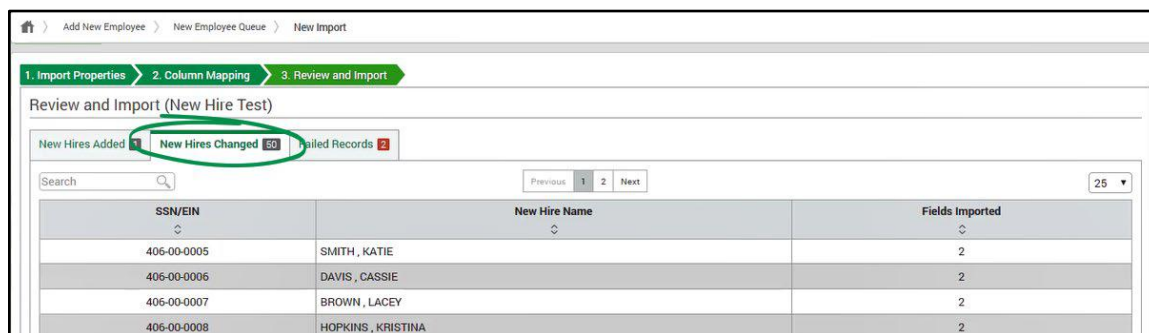
Step 3: Review and Import contains tabs for New Hires Added, New Hires Changed and Failed Records.

The New Hires Added tab contains data for each new hire you added to Paycom via import. Here, you can view each employee's Social Security or employee identification number, name and the number of fields successfully imported.



1. Import Properties > 2. Column Mapping > 3. Review and Import		
Review and Import		
New Hires Added 52	New Hires Changed 0	Failed Records 3
Search [] Previous 1 2 3 Next 25		
SSN/EIN	New Hire Name	Fields Imported
405-99-9999	BLACK, TIFFANY	20
406-00-0000	WHITE, SANDRA	19
406-00-0001	SMITH, GREG	20
406-00-0002	ROBERTSON, ROBERT	19

The New Hires Changed tab contains data for each employee currently in the Pending Employees tab of the New Hire Queue whose information was updated by the import file. Here, you can view each employee's Social Security or employee identification number, name and the number of fields successfully imported.



1. Import Properties > 2. Column Mapping > 3. Review and Import		
Review and Import (New Hire Test)		
New Hires Added 1	New Hires Changed 50	Failed Records 2
Search [] Previous 1 2 Next 25		
SSN/EIN	New Hire Name	Fields Imported
406-00-0005	SMITH, KATIE	2
406-00-0006	DAVIS, CASSIE	2
406-00-0007	BROWN, LACEY	2
406-00-0008	HOPKINS, KRISTINA	2



The Failed Records tab contains all data that failed to import. Here, each field that failed validation or contained an unknown header and the number of failed records associated will display.

To save your current progress, click "Save." The import will save within the Import Transactions tab of the New Hire Queue for you to complete at a later date.

To download a Microsoft Excel file containing each successful field, failed values and validations and the original source file, select "Save and Download File" from the Save drop-down menu.

When you're ready to complete the import, click "Finalize Import."

1. Import Properties 2. Column Mapping 3. Review and Import

Review and Import

New Hires Added 4 New Hires Changed 5 **Failed Records 7**

Search [] Previous 1 Next 25

Field	Failed Records
Unknown Headers	2
Birth Date	5
Gender	1
Marital Status	2
Work Email	8
Work Location	2
Position	5

Showing 1 - 7 of 7 records Previous 1 Next Go to Page

Previous **Save** **Finalize Import**

After you finalize the import, each new hire will display in the Pending New Hires tab of the New Employee Queue. While in the Pending New Hires tab, you can import additional data, edit and delete employees from Paycom. Once all required fields are added, use the batch hire option to hire multiple employees at once.

New Hire Queue

Pending New Hires New Employees Archived New Hires Import Transactions

Search [] 1 record selected Previous 1 2 Next 25

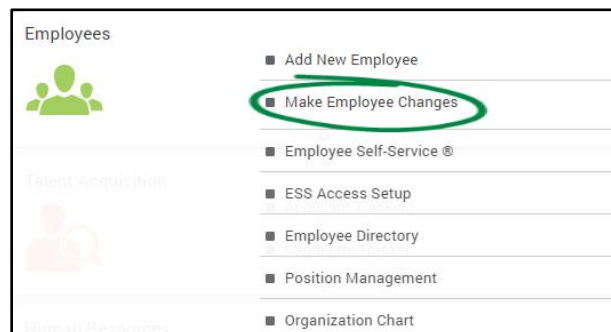
Select	SSN/EIN	Name	Home Allocation	Templ	Actions	Edit	Archive
<input type="checkbox"/>	406-00-0048	WEAVER, THOMAS	900-01-300	Default	Batch Hire Batch Edit Batch Geolocate Batch Send Invitations		
<input type="checkbox"/>	406-00-0039	TURNER, LEAH		Default			



Make Employee Changes

Whether you need to edit an employee's demographic or pay information or simply see their latest performance review, all of the information about a specific employee is stored within employee forms.

To view an employee's forms, click "Make Employee Changes" from the Employees tile.



Within Make Employee Changes, you can review general information such as an employee's status, pay class and Employee Self-Service® username. The Quick Links drop-down menu allows you to skip clicks and navigate directly to an employee's form.

Make Employee Changes

Employee Listing

Batch Actions

Add Filter...

Save Filters

Show Legal Name

Found (135) employee matches

Search

Previous 1 2 3 4 5 6 Next

Actions

25

Batch Edit	Employee Name	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service ® Login	Quick Links
<input type="checkbox"/>	AARONS, BRITTANY JANE(A001)	A	7352	200	001	HOU			09125A001	Quick Links
<input type="checkbox"/>	ABBY, HANNAH(B971)	A	2308	500	001				09125B971	01 - Rates/Taxes 02 - Earns/Deductions 03 - Dates/HR 04 - % Labor Dist 05 - 3rd Party Payees (Global) 06 - Accruals 07 - EE Photo 08 - Custom 1 08 - Custom 2 08 - Custom 3 08 - Custom 4 08 - Custom 5
<input type="checkbox"/>	ADAMS, JESSICA(A000)	A	1111	300	001				09125A000	
<input type="checkbox"/>	ADAMS, PAULINA(A036)	A	1765	1	002				09125A036	
<input type="checkbox"/>	ALIKHALAF Jr, JOHN(1347)	A	1784	1	001				091251347	
<input type="checkbox"/>	ASARE, DAVID(A000)	A	0120	400	001				09125A000	
<input type="checkbox"/>	BARNES, PATRICK(A00F)	T	5454	1	002				09125A00F	
<input type="checkbox"/>	BARNETT, LINDSEY(9457)	A	6761	200	001				091259457	Quick Links



If employees save a preferred name in Employee Self-Service®, it will display throughout Paycom as the employee's name. Check the box for "Show Legal Name" to view employee names and legal names for employees who have both.

To learn how employees can save a preferred name, please see the [Add Preferred Name to Employee Records](#) section of this guide.

Make Employee Changes

Employee Listing Batch Actions ▼

Add Filter...

☒ Show Legal Name ⓘ

Found (135) employee matches

Search

Previous 1 2 3 4 5 6 Next

Actions ⌵ ⚙

25 ▼

Batch Edit	Employee Name	Legal Name	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service ® Login	Quick Links ⓘ
<input type="checkbox"/>	AARONS, BRITTANY JANE(A001)		A	7352	200	001	HOU			09125A001	Quick Links ▼
<input type="checkbox"/>	ABBY, HANNAH(8971)		A	2398	500	001				091258971	Quick Links ▼
<input type="checkbox"/>	ADAMS, JESSICA(A00Q)		A	1111	300	001				09125A00Q	Quick Links ▼
<input type="checkbox"/>	ADAMS, PAULINA(A056) ⓘ	MICHAELS, ADAM	A	1765	1	002				09125A056	Quick Links ▼



Advanced Filters

The dynamic filter bar located at the top of the Make Employee Changes screen allows you to quickly locate specific groups of employees. For example, let's say you need to batch edit pay rates for the employees who work in your Sales department. With Advanced Filters, you can apply a department filter so only employees who work in the Sales department display in the Employee Listing.

Employee Listing

Add Filter...

Found (102) employee matches

Batch Edit	Employee	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service ® Login	Quick Links
<input type="checkbox"/>	AARONS, BRITTANY JANE (A001)	A	7352	200	002	HOU			09125A001	Quick Links
<input type="checkbox"/>	ABBY, HANNAH (8971)	A	2398	500	002				091258971	Quick Links

After you click the dynamic filter bar, a list of applicable fields will display. To select a field, use the arrows on your keyboard to highlight the desired field and press "Enter."

Employee Listing

Add Filter...

Found (102) employee matches

Press ← to Select

- Birth Date
- Clock Sequence Number
- Department
- DOL Status
- EE01 Category
- EE01 Ethnicity
- Email: Personal
- Email: Work
- Employee Added Date
- Employee Code

Status	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service ® Login	Quick Links
A	1500	SAL	TG1	2131 - M-F 7:00a and 7:30a Crew		00302A035	Quick Links
A	1600	SAL	TG0	2384 - M-F 2-1030p		00302A001	Quick Links
A	500	HRL	TG0	2404 - 9:00a and 9:30a Crew		00302A009	Quick Links
A	900	SAL				00302A022	Quick Links
V	1300	SAL				00302A051	Quick Links
A	1700	SAL		2384 - M-F 2-1030p		00302A005	Quick Links



Or, if you know the name of the field you want to include, type it in the dynamic filter bar and press “Enter.”

Batch Edit	Employee	Status	Home Department	Pay Class
<input type="checkbox"/>	ALLEN, KARA (A035)	A	1500	SA

After you select the field, the corresponding operators will display.

Batch Edit	Employee	Status	Home Department	Pay Class
<input type="checkbox"/>	ALLEN, KARA (A035)	A	1500	SAL

Finally, to complete the filter, you must select the value. For basic fields such as Department, you can apply multiple values to ensure the results meet your exact criteria.

After you select all the filter's conditions, press “Enter” to confirm and apply.

Batch Edit	Employee	Status	Home Department	Pay Class
<input type="checkbox"/>	ALLEN, KARA (A035)	A	1500	
<input type="checkbox"/>	BLACK, TIFFANY (A001)	A	1600	
<input type="checkbox"/>	BROWN, LACEY (A009)	A	500	
<input type="checkbox"/>	CALHOUN, MICHELLE (A022)	A	900	
<input type="checkbox"/>	COFTMAN, WILLIAM (A051)	V	1300	

- ☐ Accounting [500]
- ☒ Administrative [1000]
- ☒ Customer Service [1600]
- ☐ Development and Research [1100]
- ☐ Executive Management [800]
- ☐ Finance [1200]
- ☐ Human Resources [600]
- ☐ IT [400]
- ☐ Janitorial [1300]



After you create the first filter, you can apply additional filters to drill down your results even more. Each filter you apply will display beneath the dynamic search bar. To view the values tied to a filter, hover your cursor over the blue link. To remove a specific filter, click the “X.”

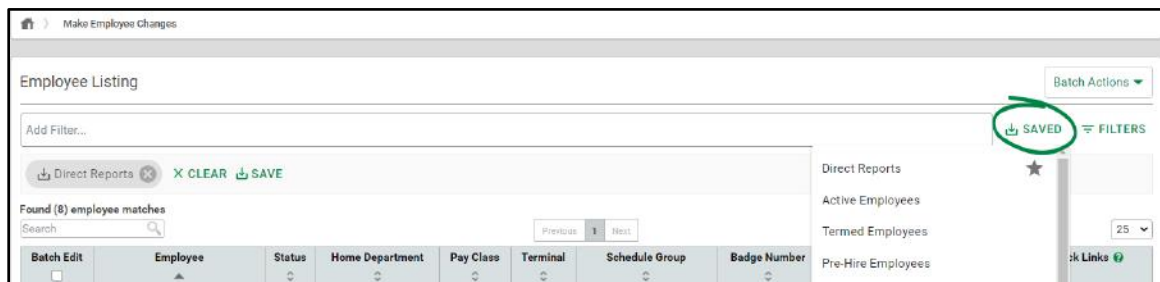
If you find yourself creating the same filter on a regular basis — save it! With Advanced Filters, you can save your filters so you can easily reuse them at any time. To do this, create your filter and click “Save.”

In the Add Save Filter pop-up window, enter a name for the filter and determine whether you want to share it with other users. If you check the box for “Favorite,” the filter will display at the top of the Saved list for quick access.

When finished, click “Save.”



Each filter you save, as well as the Paycom default filters, will display in the Saved drop-down menu. Any filters you favorite will display with a star.

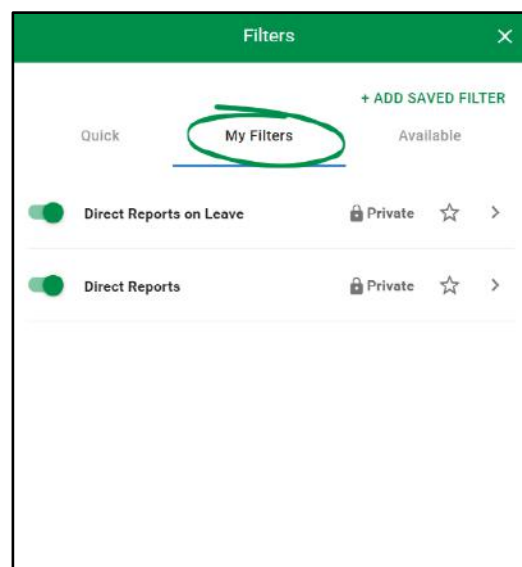
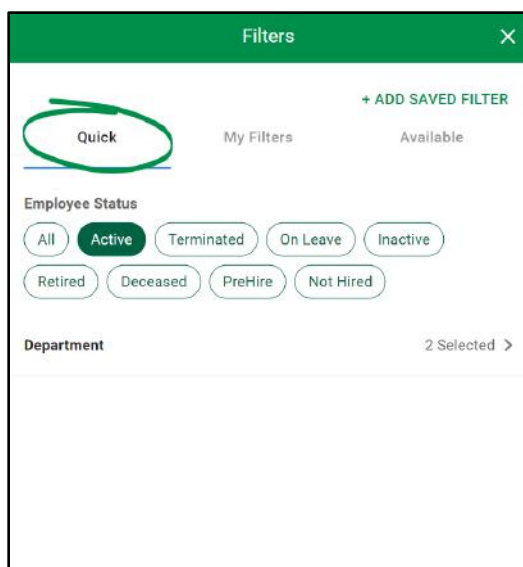


To view and manage your filters, click "Filters."



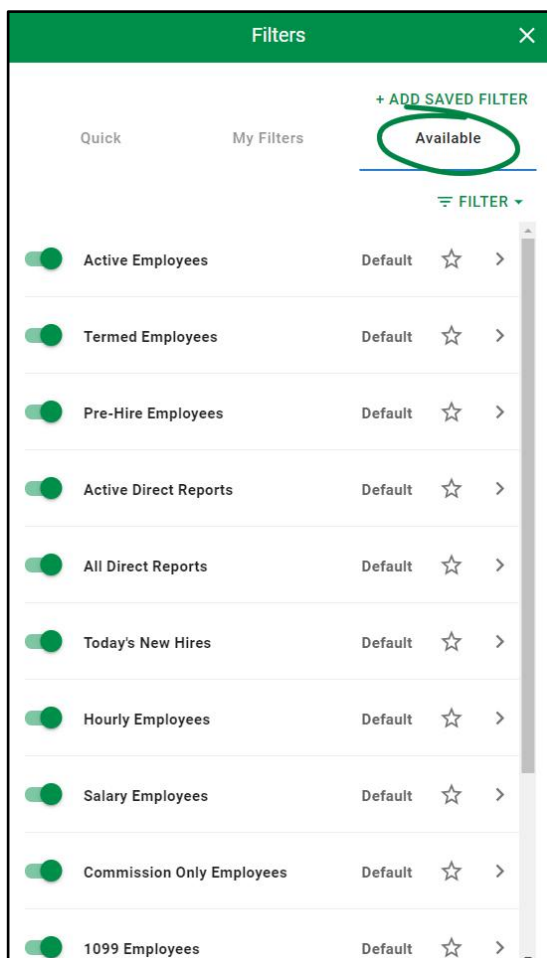
The Filters pop-up window consists of three tabs: Quick, My Filters and Available. The Quick tab allows you create a quick filter that includes the Employee Status and/or Department field.

The My Filters tab allows you to view and edit your saved filters.





The Available tab contains the Paycom default filters, as well as any filters other users created and shared. Here, you can mark a filter as a favorite and determine whether it displays in your Saved list.





Employee Menu

Click an employee's name to access the Employee Menu and view the employee's forms.

Batch Edit	Employee Name	Legal Name	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service Login	Quick Links
<input type="checkbox"/>	AARONS, BRITTANY JANE(A001)		A	7352	200	001	HOU			09125A001	Quick Links
<input type="checkbox"/>	ABBY, HANNAH (8971)		A	2398	500	001				091258971	Quick Links
<input type="checkbox"/>	ADAMS, JESSICA(A000)		A	1111	300	001				09125A000	Quick Links

Within the Employee Menu, each available form will display. Click the name of the form you would like to view or edit.

We'll break down each form for you.

The forms available vary depending on your user access and the modules your company uses with Paycom. If your company uses Personnel Action Forms, changes to Employee Forms are made most efficiently there.

Employee Menu	
1 Demographics, Pay Rates and Taxes	11 Direct Deposit
2 Scheduled Earnings and Deductions	12 Year-to-Date Totals
3 Dates and HR	13 Employee Benefits
4 Percentage Labor Distribution	14 Dependents and Beneficiaries
5 3rd Party Payees	15 Documents 1 of 4 requires action
6 Accrual Information	16 Checklists
7 Employee Photo	17 Year-End Tax Forms
8 Custom Fields	20 Compensation and Performance History
9 Employee Self-Service	21 Learning
10 Time and Attendance	



Form 1: Demographics, Pay Rates and Taxes

Form 1: Demographics, Pay Rates and Taxes is broken into sections – Employee Demographics, Labor Allocation, Employee Pay Rates, Employee Other, Employee Taxes, Federal Tax Information, State Tax Information and Custom Fields.

Employee Demographics

This section holds information about the employee and their status within the company.

When an employee's status is changed to terminated, retired or deceased, the termination date has to be entered to ensure the proper information is stored with the status change.

Here you will enter information such as status, home department and work location as well as the employee's position seat. These fields can be changed at any time.

Within each form, there is an option to see a "View Change History." This allows you to view any changes made on this form quickly.

The screenshot shows the 'Form 1 - Demographics, Pay Rates and Taxes' interface for employee ABBY, HANNAH (8971). The interface includes a header with navigation links, a profile picture, and a 'View Change History' button circled in green. The main form contains sections for Employee Names, Employee Demographics, and Employee Other.

Employee Names

Field	Value	Action
Legal Name	ABBY, HANNAH	Edit
Preferred Name		Add
Nickname		

Employee Demographics

Field	Value	Action
Employee Status	ACTIVE	
On-Leave Start Date	00/00/0000	
On-Leave End Date	00/00/0000	
Termination Date	00/00/0000	
Department	Accounting [500]	
Position Title	Staff Accountant	
Position Seat	0001G - Staff Accountant Time in Position: 0 Years 9 Months 15 Days Reports To: Accounting Manager - GOULD, BRITTANY	Change
Primary Phone	405 - 555 - 1111	Other
Secondary Phone		Other
Work Location	Kansas City	
Primary Address	309 NE 6TH DRIVE, LENEXA, KS 66211	Add/Edit



If you indicated the employee has applied for a Social Security number in the New Hire Guided Setup, their temporary identification number will display in the Social Security Number field. Once the employee receives their Social Security Number from the Social Security Administration, uncheck the “Applied For” box and enter their number in the Social Security field. Once saved, the change will register across Paycom.

Make Employee Changes > Employee Menu > Form 1 - Demographics, Pay Rates and Taxes

ABBY, HANNAH (8971)
ACTIVE W-2
Accounting (500)...
Hired 07/05/2017
View Full Profile
01 - Demographics, Pay Rates and Taxes

ABBY, HANNAH (8971) List All Add New Employee

Form 1 - Demographics, Pay Rates and Taxes View Change History

Employee Names

Legal Name ABBY, HANNAH Edit Preferred Name Add

Nickname

Employee Demographics

Employee Status ACTIVE Social Security Number 000 - 00 - 0001 Applied For

On-Leave Start Date 00/00/0000 On-Leave End Date 00/00/0000

Termination Date 00/00/0000 Department Accounting [500]

Position Title Staff Accountant Position Seat 0001G - Staff Accountant
Time in Position: 0 Years 9 Months 15 Days
Reports To: Accounting Manager - GOULD, BRITTANY
change

Primary Phone 405 - 655 - 1111 Other Secondary Phone Other

Work Location Kansas City

Primary Address 309 NE 5TH DRIVE, LENEXA, KS 66211 Add/Edit

If an employee does not have a work location saved within Form 1: Demographics, Pay Rates and Taxes and you attempt to update the form without adding a work location, the following error message will display. To save your changes, you must assign the employee a work location.

Error


A Work Location must be assigned to the employee.

Confirm




Labor Allocation


Labor Allocation details will also appear on this form. If you need to make changes, click "Change/Edit."

Labor Allocation		
Labor Allocation Profile 		
<div>All</div>		
Department	Locations	Jobs
[500] Human Resources	Fort Worth[500]	Employee No Reports[200]

Select the appropriate information from the drop-down menus and click "Save." Each field is customized to the categories designated by your company.

If you have multiple EINs with Paycom, each employee must be assigned to a default Payroll Profile. To select or change the default, select the appropriate payroll from the drop-down menu. If you need to set up a Labor Allocation Profile, within the User Options menu, click "Labor Allocation Filter Profiles."


 > [Make Employee Changes](#) > [Employee Menu](#) > [Edit Labor Allocation Details](#)



ABBY, HANNAH (8971)
ACTIVE W-2
Accounting (500)...
Hired 07/05/2017
[View Full Profile](#)

< ABBY, HANNAH (8971) >

List All



01 - Demographics, Pay Rates and Taxes

Edit Labor Allocation Details

Department

Accounting [500]

Location

Corporate - [001]

Job

Employee - No Direct Reports - [003]

Cancel

Save



Employee Pay Rates

This section holds information like the employee's pay type, salary or rate information, and pay frequency.

Within this section, there are three tabs. On the Base Pay tab you have the option to show your salary employees' per-pay period or per annum salary and hourly rates.

If you are a Multi-EIN customer, and the employee is eligible to be paid out of Payroll Profiles, you will mark those by clicking "Change/Edit" next to Eligible Payroll Profiles.

Employee Pay Rates

*** Indicates Required Field**

Base Pay Rates by Allocation Base Pay Changes

Data is current as of 09/23/2019 ?

Date Effective * 11/20/2019

Pay Type Salary ▾

Processing Schedule ? Semi-Monthly ▾ [View Schedule](#)

Pay Frequency ? Semi-Monthly

Pay Basis Check Display ? * Salary ▾

Pay Period Salary \$ 1,500.00 /pp

Salary ? 36000.00 Per Annum ▾ (\$17.31/hr)
Per Pay Period
Per Annum

Employee Other



On the Rates by Allocation Tab, specify different pay rates for when the employee works in different positions.

Employee Pay Rates

* Indicates Required Field

Base Pay Rates by Allocation Base Pay Changes

Add Rate

Current Rates

Batch Batch Delete

Search

Select	Effective Date	Allocation	Description	Reg (DRR)	Daily OT (DRO)	Weekly OT (DRO)	Edit	End Rate
<input type="checkbox"/>	08/20/2018	(+) 200-100-200	Employee No Reports-Sales-Houston	(PST) \$19.00	(PST) \$28.50	\$28.50		
<input type="checkbox"/>	11/22/2019	500-200	-Fort Worth-Employee No Reports	\$15.00	\$22.50	\$22.50		
<input type="checkbox"/>	11/22/2019	500-1000	-Kansas City-Manager	\$25.00	\$37.50	\$37.50		

Past Rates

Search

Effective Date	Allocation	Description	Reg (DRR)	Daily OT (DRO)	Weekly OT (DRO)	Make Current	Delete
No Records Found							

On the Base Pay Changes tab you can see the current rates and rate history for the employee.

Employee Pay Rates

* Indicates Required Field

Base Pay Rates by Allocation Base Pay Changes

Current Rates

Search

Effective Date	Rate Type	Amount	Pay Type	Processing Schedule	Default Regular Hours	Annual Amount	Pay Basis Check Display	Edit	Delete
01/01/2021	Salary	\$3,846.15	Salary (Per Annum)	Bi-Weekly	80.00	\$100,000.00			

Rate History

Search

Effective Date	Rate Type	Amount	Pay Type	Processing Schedule	Default Regular Hours	Annual Amount	Pay Basis Check Display	Edit	Delete
11/13/2020	Salary	\$3,269.23	Salary (Per Annum)	Bi-Weekly	80.00	\$85,000.00			



Employee Other

In this section you have the ability to raise or lower your Excessive Net Threshold companywide or you can assign individual thresholds to specific employees. The company threshold is defaulted to \$10,000.

To raise or lower your Excessive Net Threshold companywide, contact your dedicated Paycom specialist.

Employee Other	
Excessive GROSS Threshold	<input type="text" value="0.00"/>
Excessive NET Threshold	<input type="text" value="0.00"/>
Workers' Comp *	[KS008810] Clerical (Rate = 0.012000) ▼
Minimum Wage Profile	Default State Minimum Wage [DEF] ▼
Auto Reduce Negative Check Group ?	Search or Make Selection ▼
ABBR Calculation Rule	Manual Entry ▼ ⚙
Annual Benefits Base Rate ?	<input type="text" value="0.00"/>
Direct Deposit ?	Disabled
Clock Sequence Number ?	<input type="text"/>
Full-Time Employee Factor ?	<input type="text" value="1"/>
Employee GL Code	<input type="text" value="8971"/>
Print Paystub Message ?	<input type="checkbox"/> <input type="text"/>
Print Check Message ?	<input type="checkbox"/> <input type="text"/>



Employee Taxes

This section holds the employee's local and state tax profiles. These profiles contain Lives-in, Works-in and SUI state information. This is beneficial for employees who travel and work in different states or for an employee who recently moved to a new state.

Employees can elect to have an additional amount or percent come out for federal or state taxes.

Employee Taxes

Tax Profile
KS/TX/TX (3 of 3)
Change

Lives-in State
Kansas

Works-in State
Texas

SUI Agency
Texas

Local Tax Agency

Client-Local Agency

Federal Tax Information

Filing Status	Dependents / Adjustments	Additional Amount	Additional Percent	Block	Locked In	Federal W-4
<div>Single or Married filing separately</div> <div><input type="checkbox"/> Multiple Jobs</div>	<div>Dependents: \$</div> <div>Other Income: \$</div> <div>Deductions: \$</div>	<div>\$</div> <div>20.00</div>	<div>0.0000 %</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div>2021fw4.pdf</div>

State Tax Information

State	Filing Status	Dependents / Adjustments	Additional Amount	Additional Percent	Block	Locked In
Kansas	Single	0	\$ 20.00	0.0000 %	<input type="checkbox"/>	<input type="checkbox"/>
Missouri	Single or Married Spouse Works or Married Filing Separate		\$ 20.00	0.0000 %	<input type="checkbox"/>	<input type="checkbox"/>

Exclude W-2 Employee From Year End
No



Through the Tax Setup Form on Employee Self-Service®, employees can check whether they are exempt from taxes based on their Form W-4.

IT'S ALL ABOUT YOUR PEOPLE

Time Management Time-Off Requests Information Payroll Expenses Documents Checklists Benefits Performance Personnel Forms Company Information My Learning

Tax Setup

Federal Tax Setup

You may have to pay a penalty of \$500 if both of the following apply:
You make statements or claim withholding allowances on your Form W-4 that reduce the amount of tax withheld.

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes. To download the current W-4 for complete instructions and worksheet, click here:

Step 1: Enter Personal Information

Select your Federal Filing Status.

Federal Filing Status
Married

Step 2: Multiple Jobs or Spouse Works

Check this box if you hold more than one job or are married filing jointly and your spouse also works.

☐ Multiple Jobs

Step 3: Claim Dependents

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly).

Enter the number of qualifying children under age of 17.

Children Under Age 17
2 - \$4,000

Enter the number of other dependents.

Other Dependents
1 - \$500

Total dollar amount of dependents calculated from both fields above.

Total
\$ 4,000.00

Step 4: Other Adjustments

Other Income - If you want tax withheld for other income you expect this year that won't have withholding.

Other Income
\$ 0.00

Deductions - If you expect to claim deductions other than the standard deduction and want to reduce your withholding.

Deductions
\$ 0.00

Extra Withholding - Enter any additional tax you want withheld each pay period.

Extra Withholding
\$ 0.00

Do you claim exemption from withholding for 2019?

☐ Exempt

CANCEL UPDATE



Once checked and updated, this will flow to Form 1: Demographics, Pay Rates and Taxes in the Block column.

Federal Tax Information					
Filing Status	Dependents / Adjustments	Additional Amount	Additional Percent	Block	Locked In
<div>Single or Married filing separately ▼</div> <div><input type="checkbox"/> Multiple Jobs</div>	Dependents: \$ <input type="text" value="0.00"/> Other Income: \$ <input type="text" value="0.00"/> Deductions: \$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	<input type="text" value="0.0000"/> %	<input checked="" type="checkbox"/>	<input type="checkbox"/>

In the Federal Tax Information section, you will also see the Form W-4. This allows you to compare what the employee is selecting to what is showing within Form 1: Demographics, Pay Rates and Taxes. The employee must both acknowledge and sign the Federal Tax changes within Employee Self-Service®.

Any changes you make will require the employee to complete a new Form W-4. We encourage any employee who requests a Federal Tax Change to be directed to Employee Self-Service® to make the change so Form 1: Demographics, Pay Rates and Taxes will reflect an accurate Form W-4.

Federal Tax Information						
Filing Status	Dependents / Adjustments	Additional Amount	Additional Percent	Block	Locked In	Federal W-4
<div>Single or Married filing separately ▼</div> <div><input type="checkbox"/> Multiple Jobs</div>	Dependents: \$ <input type="text" value="2000.00"/> Other Income: \$ <input type="text" value="0.00"/> Deductions: \$ <input type="text" value="0.00"/>	\$ <input type="text" value="20.00"/>	<input type="text" value="0.0000"/> %	<input type="checkbox"/>	<input type="checkbox"/>	<div>2020fw4.pdf</div>



Taxes by Geolocation

Taxes by Geolocation uses the latest geocoding technology to tie your employees' tax profiles to their work and home addresses to find potential tax liabilities. This ensures your employees are assigned the appropriate tax profile and limits prior period adjustments due to inaccurate tax setup.

Convert Delivery Locations to Work Locations

For Paycom to generate the appropriate tax information, employees must be assigned a work location. Work locations are used throughout Paycom to document the physical place employees work. As a best practice, all locations should be saved in Company Maintenance and assigned to employees so you can use each module to its fullest potential and ensure accurate reporting. Taxes by Geolocation will use each location's address to determine the employee's works-in state and SUI tax agency.

If you don't have work locations created yet, you can convert the delivery locations Paycom has on file to limit the amount of required setup. Navigate to User Options > Company Maintenance > Locations/Establishments to begin the conversion.



The yellow banner at the top of the Locations tab displays the number of delivery locations that aren't saved as a work location. Click "Convert Delivery Locations" to continue.





Each unconverted delivery location will display in the conversion table. The Status column may contain the following icons:

- **Green Checkmark:** Delivery location is valid and has a description.
- **Yellow Warning:** Delivery location does not have a description. If converted, the first line of the address will be used as the description.
- **Red X:** Delivery location is a P.O. Box and cannot be converted to a work location.

Review the information and check the box next to each delivery location you want converted to a work location. When finished, click "Convert Selected."

Locations to be Converted

Search 3 records selected Previous 1 Next

Select All	Status	Address	City	State/Province	Zip Code	Description	Work Location
<input checked="" type="checkbox"/>		7501 W MEMORIAL RD	OKLAHOMA CITY	OK	73142		YES
<input checked="" type="checkbox"/>		417 OAKBEND DR	LEWISVILLE	TX	75067		YES
<input checked="" type="checkbox"/>		123 MAIN ST	LOS ANGELES	CA			YES
<input type="checkbox"/>		PO BOX 1033	EDMOND	OK	73003		NO

Showing 1 to 4 of 4 entries

Previous 1 Next

Go to Page

Convert Selected



Once complete, Paycom will convert the information and the new work location(s) will display within the Locations tab where you can edit or delete. *For more information on how to manage work locations, please see our Company Maintenance guide available on the Help Menu.*

Company Maintenance
Company Locations

Locations

Establishments

View Change History

Add New Location

* Indicates Required Field

Description

Address

City, State/Province, Zip

Texas

County

EEOC Unit Number

Is this location a Hiring Site?

Yes No

Is this a VETS-4212 Hiring Location?

Yes No

Hide Location

Yes No

Cancel

Add

Locations

Search

Previous 1 Next

25

Select All	Location ID	E-Verify Hiring Site	VETS-4212 Hiring Location	Description	Address	City	State/Province	Zip Code	Establishment	Edit	Delete
<input type="checkbox"/>	2535	No		123 MAIN ST	123 MAIN ST	LOS ANGELES	CA	90001			
<input type="checkbox"/>	2534	No		123 SHADYBROOK LANE	123 SHADYBROOK LANE	EDMOND	OK	73013			
<input type="checkbox"/>	2533	No		417 OAKBEND DR	417 OAKBEND DR	LEWISVILLE	TX	75067			
<input type="checkbox"/>	2220	Yes	Yes	Corporate Headquarters	7501 W Memorial Road	Oklahoma City	OK	73142	Corporate		In Use



Assign Work Locations to Employees

Once your company locations are saved in Company Maintenance, assign them to employees in Form 1: Demographics, Pay Rates and Taxes. Select the appropriate location from the Work Location drop-down menu and click "Update" at the bottom of the screen to save your changes.

Make Employee Changes > Employee Menu > Form 1 - Demographics, Pay Rates and Taxes

NELSON, SOPHIE (0234)
ACTIVE W-2
Accounting (500)
Hired 06/17/2019
View Full Profile
01 - Demographics, Pay Rates and Taxes

NELSON, SOPHIE (0234) List All Add New Employee

Form 1 - Demographics, Pay Rates and Taxes View Change History

Employee Names

Legal Name NELSON, SOPHIA FLYNN Edit Preferred Name NELSON, SOPHIE (Displayed on Paystub) Edit Delete

Nickname SOPH

Employee Demographics

Employee Status ACTIVE Social Security Number 349 - 73 - 8347 Applied For

On-Leave Start Date 02/01/2021 On-Leave End Date 04/16/2021

Termination Date 00/00/0000 Department Accounting [600]

Position Title Finance Manager (16) Position Seat * 0000P - Finance Manager
Time in Position: 0 Years 0 Months 0 Days
Reports To: Director of Finance - Vacant
Change

Primary Phone 405 - 111 - 1111 Cell Secondary Phone - - - Other

Work Location * Dallas

Primary Address 123 PINK STREET, KANSAS CITY, KS 64030 Add/Edit

To assign the same work location to multiple employees quickly, navigate to Make Employee Changes, check the box next to the appropriate employees and select "Batch Edit Menu" from the Batch Actions drop-down menu.

Make Employee Changes

Employee Listing

Add Filter...

Show Legal Name

Found (135) employee matches
Search 4 records selected

Previous 1 2 3 4 5 6 Next Actions 25

Batch Edit	Employee Name	Legal Name	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service @ Login	Quick Links
<input checked="" type="checkbox"/>	AARONS, BRITTANY JANE(A001)		A	7352	200	001	HOU			09125A001	Quick Links
<input checked="" type="checkbox"/>	ABBY, HANNAH(0971)		A	2398	500	002				091258971	Quick Links
<input checked="" type="checkbox"/>	ADAMS, JESSICA(A000)		A	1111	300	001				09125A000	Quick Links

Batch Actions
Batch Edit Menu
Effective Dating



On the Batch Edit Menu, click “Employee Properties.”

Batch Edit Menu

Paycode Profile Update

Deduction Edit

Accrual Edit

Earning Edit

Employee [Employee Properties](#) Edit

Scroll to the Work Location drop-down menu. Then, select the appropriate location and click “Update” at the bottom of the screen.

Available Health Insurance ☐ Yes, report. ☐ No, do not report.

Non-Resident Alien ☐ Check this box if this employee is a non-resident alien.

Work Location Edit

Expense Management

Expense Management Policy



Review Address Changes

When employees update their address in Employee Self-Service® or change work locations, a new tax profile must be created in Form 1: Demographics, Pay Rates and Taxes. As a best practice, you should generate the Employee Changes Report on a regular basis. This allows you to track address changes so you can ensure your employees' tax profiles are up-to-date.

To access this report, navigate to the Report Center and click "Employee Changes Report" from the Audit Reports tab.

The screenshot shows the 'Report Center' interface. On the left, there is a sidebar with categories: Report Writers, New Hire Reports, HR Reports, Audit Reports (highlighted), Payroll Reports, Payroll Grid Reports, Accrual Reports, Affordable Care Act Reports, Applicant Tracking Reports, and Ask Here Reports. The main area displays a list of reports under the 'Audit Reports' category. The 'Employee Changes Report' is circled in green. Each report entry includes a name, a help icon, and available export formats (PDF, Excel, HTML, CSV).

Report Category	Report Name	Export Options
Audit Reports	Add Employees Report ?	PDF Excel HTML CSV
	Changed Contacts Report ?	PDF Excel HTML CSV
	Effective Dates Report ?	PDF Excel HTML
	Employee Changes Report ?	PDF Excel HTML CSV
	Employee Notes Report ?	PDF Excel HTML CSV
	Notification Audit Report ?	PDF Excel HTML CSV
	Time and Attendance Notification Report ?	PDF Excel HTML CSV

In the Report-Specific options, scroll to the Filter By Employee Change section to drill down the report and easily view address changes.

The screenshot shows the 'Filter By Employee Change' section. It includes a search bar, a 'Select All' checkbox, and a list of filters with checkboxes. The 'Address City' filter is checked.

Filter	Selected
Address City	<input checked="" type="checkbox"/>
Address Home State	<input checked="" type="checkbox"/>
Address Street	<input checked="" type="checkbox"/>
Address Zipcode	<input checked="" type="checkbox"/>
Update City Address	<input checked="" type="checkbox"/>
Update State Address	<input checked="" type="checkbox"/>



Once generated, compare employees' old and new addresses.

Report Center

Employee Changes Report

Report Details

Back / Load Current Back / Clear

Export to: ▼

Date Range (12/01/2020 - 12/31/2020)

#	EE Code	Employee Name	ClockSeq#	Labor	Change Description	Old Value	New Value	Time Changed	Changed By	IP Address	User Type	Child Code	Change Type	Notes
1)	0234	NELSON, SOPHIA FLYNN		Finance[500] - Kansas City[600] - Director of Employee Engagement[400]	Address City	KANSAS CITY	DALLAS	12/14/2020 03:19:16 PM	054250234	10.201.23.25	LE		U	
2)	0234	NELSON, SOPHIA FLYNN		Finance[500] - Kansas City[600] - Director of Employee Engagement[400]	Address Home State	KS	TX	12/14/2020 03:19:16 PM	054250234	10.201.23.25	LE		U	
3)	0234	NELSON, SOPHIA FLYNN		Finance[500] - Kansas City[600] - Director of Employee Engagement[400]	Address Street	1876 NEBRASKA DRIVE	123 MAIN STREET	12/14/2020 03:19:16 PM	054250234	10.201.23.25	LE		U	
4)	0234	NELSON, SOPHIA FLYNN		Finance[500] - Kansas City[600] - Director of Employee Engagement[400]	Address Zipcode	38778	75201	12/14/2020 03:19:16 PM	054250234	10.201.23.25	LE		U	

Icon Denotes a Company Level User
Icon Denotes an Employee Self-Service User

Create New Tax Profiles

After reviewing the address change, you'll need to edit the employee's tax profile. To do this, navigate to Make Employee Changes and click the appropriate employee's name.

Make Employee Changes

Employee Listing

Batch Actions ▼

Add Filter...

Save Filters

☒ Show Legal Name

Found (135) employee matches

Search 🔍

Previous 1 2 3 4 5 6 Next

Actions ⚙️

25 ▼

Batch Edit	Employee Name	Legal Name	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service @ Login	Quick Links
<input type="checkbox"/>	AARONS, BRITTANY JANE(A091)		A	7352	200	001	HOU			09125A001	Quick Links ▼
<input type="checkbox"/>	ABBY, HANNAH (0971)		A	2398	500	001				091258971	Quick Links ▼
<input type="checkbox"/>	ADAMS, JESSICA(A00Q)		A	1111	300	001				09125A00Q	Quick Links ▼



From the Employee Menu, click “Demographics, Pay Rates and Taxes.”

Make Employee Changes > Employee Menu

ABBY, HANNAH (8971)
ACTIVE W-2
Accounting (500) ...
Hired 07/05/2017
View Full Profile
Select Form

ABBY, HANNAH (8971)
List All

Add New Employee

Employee Menu

1	Demographics, Pay Rates and Taxes	11	Direct Deposit
2	Scheduled Earnings and Deductions	12	Year-to-Date Totals
3	Dates and HR	13	Employee Benefits
4	Percentage Labor Distribution	14	Dependents and Beneficiaries
5	3rd Party Payees	15	Documents

In the Employee Taxes section, you can view the employee’s current tax profile. You cannot edit a tax profile that has been processed through payroll. Instead, you must create a new tax profile for the employee. To do this, click “Change.”

Employee Taxes ?

Tax Profile	KS/TX/TX (3 of 3)	Change
Lives-in State	Kansas	
Works-in State	Texas	
SUI Agency	Texas	
Local Tax Agency	...	
Client-Local Agency	...	

Then, on the Employee Tax Profile screen, click “Create New Tax Profile.”

Make Employee Changes > Employee Tax Profile

Employee Tax Profiles (0234)

Create New Tax Profile

Search

Previous 1 Next

ID	Description	Live State	Work State	SUI State	View	Edit
3	KS/TX/TX	Kansas	Texas	Texas		
1	MO/MO/MO	Missouri	Missouri	Missouri		



The employee's home address and work location saved within Form 1: Demographics, Pay Rates and Taxes will display in the Create New Tax Profile pop-up window. If the employee is not assigned a work location, use the Work Location drop-down menu to assign the appropriate location.

Taxes by Geolocation will run automatically based on the employees' home address and work location and the Lives-In State, Works-In State, SUTA State, Employee Local Taxes and Employer Local Taxes fields will autofill with the applicable tax information. Review the information and make any necessary changes. When finished, click "Add" to create the new tax profile.

If a state is missing from the Lives-In State, Works-In State or SUTA State drop-down menus, please contact your dedicated Paycom specialist.

Create New Tax Profile

These potential taxes have been populated solely based on the employee's home address and work location. Please confirm the accuracy of the potential taxes that have been populated. Please note that you may, at any time, change the tax profile to your preferred choice.

* Indicates Required Field

Home Address123 PINK STREET KANSAS CITY, KS 64030

Work Location4050 Regent Blvd Irving, TX 75063 (Dal

Tax Profile DescriptionKS/TX/TX

Make Default Profile☒

Look Up Potential TaxesSearch

Lives-In StateKansas

Works-In StateTexas

SUTA StateTexas

Local Tax Setup

Employee Local Taxes

EE Local Tax Agency 1Search or Make Selection

EE Local Tax Agency 2Search or Make Selection

EE Local Tax Agency 3Search or Make Selection

+

Employer Local Taxes

Client Local Tax Agency 1Search or Make Selection

Client Local Tax Agency 2Search or Make Selection

Client Local Tax Agency 3Search or Make Selection

+

Close

Add



Form 2: Scheduled Earnings and Deductions

On Form 2: Scheduled Earnings and Deductions, add any scheduled earnings, deductions and garnishments for this employee.

Scheduled Earnings

Scheduled Earnings are earnings set up to be paid on an employee's check on a regular frequency. These will add the entered amount on the payroll automatically without the need to insert it manually each time.

To add an earning, click "Add."

Form 2 - Scheduled Earnings and Deductions

Paycode Profile: Search or Make Selection [Update]

View Change History

Scheduled Earnings [Hide] [Add]

Code	Earning Description	Amount(\$)	Percent(%)	Set Limit	Frequency	Earning Start Date	Earning Stop Date	Goal Amount	Goal Accum	Remaining Balance	Department-Locations-Jobs
BON	Bonus	0.00		<input checked="" type="radio"/> No <input type="radio"/> Yes \$0.00	Every Payroll	00/00/0000	00/00/0000		\$500.00		None [Setup]
OTL	Group Term Life Earning 2	Birthdate: 1993-07-09 [OTL Age: 26]	Policy Number	Insurance Value: 0.00 Override	Employee Cost: 0.00	00/00/0000	00/00/0000				None [Setup]

Then, select the applicable earnings and click "Add."

If you do not see an earning needed in the pop-up window, contact your dedicated Paycom specialist.

Add Scheduled Earnings

- ☒ 3PSP - STD [SPS]
- ☒ Bonus [BON]
- ☒ Commission [COM]
- ☐ Group Term Life Earning [OTL]
- ☐ Group Term Life Earning 2 [OTL2]
- ☐ Group Term Life Earning 3 [OTL3]
- ☐ Piece Rate [PST]
- ☐ Severance [SEV]
- ☐ Tips [TIP]
- ☐ Units [UNIT]

[Cancel] [Add]



Then, enter the specific information about the earning.

Form 2 - Scheduled Earnings and Deductions

Paycode Profile:

Scheduled Earnings:

Code	Earning Description	Amount(\$)	Percent(%)	Set Limit	Frequency	Earning Start Date	Earning Stop Date	Goal Amount	Goal Accum	Remaining Balance	Department-Locations-Jobs
BON	Bonus	<input type="text" value="0.00"/>		<input type="radio"/> No <input type="radio"/> Yes \$0.00	Every Payroll	<input type="text" value="00/00/0000"/>	<input type="text" value="00/00/0000"/>		\$500.00		None <input type="button" value="Setup"/>
COM	Commission	<input type="text" value="0.00"/>		<input type="radio"/> No <input type="radio"/> Yes \$0.00	Every Payroll	<input type="text" value="00/00/0000"/>	<input type="text" value="00/00/0000"/>		\$0.00		None <input type="button" value="Setup"/>
GTB	Group Term Life Earning 2	<input type="text" value="0.00"/>		<input type="radio"/> No <input type="radio"/> Yes \$0.00 Override <input type="checkbox"/>	Every Payroll	<input type="text" value="00/00/0000"/>	<input type="text" value="00/00/0000"/>				None <input type="button" value="Setup"/>

- **Amount:** The amount entered will be awarded to the employee.
- **Percent:** If the earning is a percentage of gross earning, then the percentage amount will show here. Only your dedicated specialist is able to change the percentage amount.
- **Earning Start Date:** Enter the date the earning should start being automatically inserted into payroll. *The earning start date is based on check date, not pay-period.*
- **Earning Stop Date:** Enter the date the earning should automatically stop being inserted into payroll. *The earning stop date is based on check date, not pay-period.*
- **Frequency:** How often the earning will be applied to payroll based on how the earning was set up by your dedicated specialist.
- **Department:** You can set a fixed allocation for an earning. This is beneficial if you pay employees fixed stipends and want those stipends to go to a specific allocation instead of the employee's home or worked-in allocations.

Piece Rate Units

If your company uses units to track your employee's time, you're able to set this up in Form 2: Scheduled Earnings and Deductions, as well. With our unit-tracking feature, you will receive a detailed report of the true hours worked combined with units produced and the piece-rate earnings associated.

To enable this feature, please contact your dedicated Paycom Specialist.

After this feature is enabled, you will assign the Piece Rate as a scheduled earning and the timecard will display the rate from the earning code assigned to the employee.

PST	Piece Rate	<input type="text" value="0.000000"/>	<input type="text" value="Unit"/>	<input type="radio"/> No <input type="radio"/> Yes \$0.00	Every Payroll	<input type="text" value="00/00/0000"/>	<input type="text" value="00/00/0000"/>		\$0.00		None <input type="button" value="Setup"/>
-----	------------	---------------------------------------	-----------------------------------	--	---------------	---	---	--	--------	--	---



Scheduled Deductions

Scheduled Deductions are amounts set to be deducted from the employee's check at a certain frequency. These will be deducted automatically from payroll on the frequency specified. Common scheduled deductions include health and 401(k) deductions.

If you are using Paycom's Benefits Administration, be sure to refer to the Benefits Administration section on the Help Menu for information on how to enroll, approve and send benefits to payroll.

To add a deduction, click "Add."

Scheduled Deductions															Hide	Add
Code	Description	Amount(\$)	Percent(%)	Set Limit ?	Match Policy ?	Direct Deposit ?	Benefit Level and Plan Name ?	Benefit Effective Date	Coverage End Date	Deduction Start Date ?	Deduction Stop Date ?	Frequency	Goal Amount	Goal Accum ?	Remaining Balance	Arrears
CCD	Company Card	<input type="text" value="0.00"/>		<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="text" value="0.00"/>						<input type="text" value="00/00/0000"/>	<input type="text" value="00/00/0000"/>	Every Payroll		\$0.00		
CSD	Company Sponsored No Ded	<input type="text" value="3.46"/> Override		<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="text" value="0.00"/>			Basic Employee Life - Company Paid Employer Per Pay Period Amount .63.46	01/01/2019	04/25/2019	01/01/2019	04/25/2019	Every Payroll		\$17.30		

Then, select the applicable deductions and click "Add."

If you do not see a deduction needed in the pop-up window, contact your dedicated Paycom specialist.

Add Scheduled Deductions

☒ 401K [FKF]
☒ Car Allowance [CCA]
☐ Company Card Rei [689]
☐ Company Paid ER Health Plan [ERH]
☐ Dental Pre-Tax [DEN]
☐ Employee Contributions [ECT]

Show Selected Only



Insert the amount or percent that should be deducted on each payroll.

EXP	Expense Reimbursement	25.00	<input type="radio"/> No <input checked="" type="radio"/> Yes	0.00				00/00/0000	00/00/0000	Every Payroll		\$150.00			
40P	401K %	0.040000 % Override	Yes	\$19000.00	402	Standard 401K 2019	Employee Per Pay Period Amount 0.0400%	01/01/2019	04/25/2019	01/01/2019	04/25/2019	Every Payroll	19000.00	\$294.10	18705.90

- **Amount:** The specific amount of money to be deducted from the employee's check at a certain frequency.
- **Percent:** The percent of an employee's earnings to be deducted from the employee's check at a certain frequency.
- **Override:** Deduction amounts and percentages for deductions tied to benefit plans will be grayed out and locked to eliminate unnecessary changes in Paycom. To make changes to these amounts, click the "Override" option found below the amount. If you want the change to reflect in Benefits Administration, click on the plan name from the Benefit Level and Plan Name column. Any changes will be logged in the Benefit Changes Audit Report.
- **Set Limit:** If the deduction calls for a limit such as a loan, you can insert the limit amount in the "Set Limit" column. The deduction will stop being taken from the paycheck once the limit is reached.
- **Match Policy:** If the deduction is a 401(k) and you want to override the policy at which the 401(k) is matched, you can override it in this column.
- **Direct Deposit:** If the deduction is set up to be direct deposited automatically into an account, you can set the routing and account numbers for this deduction.
- **Benefit Level and Plan Name:** This is for deductions tied to benefit plans. The plan name and benefit level will display. Selecting the plan name hyperlink directs you to Form 13: Employee Benefits.
- **Benefit Effective Date:** The date the benefit is effective.
- **Coverage End Date:** This is the date that the coverage for the benefit will end.
- **Deduction Start Date:** Specify the date you want the deduction to begin. The deduction will then come out on the first payroll with a processing date after the date entered.
- **Deduction Stop Date:** Specify the date the deduction will stop being taken from the paycheck, based on the check date.
- **Frequency:** Frequency in which the deduction is deducted. Frequencies are set up on the deduction by your dedicated specialist.
- **Goal Amount:** Amount that the limit is established for the deduction.
- **Goal Accum:** The total amount deducted for the current year.



- **Remaining Balance:** Remaining balance until the limit is met.
- **COBRA Eligible Benefit:** Checked whether it is a COBRA-eligible deduction in which the employee is enrolled.

Scheduled Garnishments

Scheduled Garnishments are amounts set to be deducted from the employee's check at a certain frequency. These will be inserted automatically into payroll on the frequency specified.

If your company uses Paycom's Garnishment service, please see the Garnishments guide on the Help Menu. If your company does not use our service, contact your dedicated Paycom specialist.

Form 3: Dates and HR

Form 3: Dates and HR contains important employee dates, human resources and supervisor information. In your employee's Form 3: Dates and HR, the gender, race/ethnicity, disability and VETS 4212 Classification compliance fields will be stored separate from the employee record and not generally accessible, according to the Equal Employment Opportunity Commission and Office of Federal Contract Compliance Programs guidelines. With access, you can review this information on the Sensitive Compliance Fields tab.

Use the tabs within Form 3: Dates and HR to navigate easily.

Additional tabs include Employee Dates, Human Resources Information, Contact Information, Organizational Relationships, Government Reporting and Custom Fields.

Form 3 - Dates and HR

Employee Dates | Human Resources Information | Contact Information | Organizational Relationships | Government Reporting | **Sensitive Compliance Fields** | Custom Fields | View Change History

Gender ☐ Male ☒ Female

EEO-1 Ethnicity White

EEO-1 Disability Status ☐ Yes ☒ No

VETS-4212 Employee Category

- ☐ Disabled Veteran
- ☐ Recently Separated Veteran Military Discharge Date
- ☐ Active Wartime or Campaign Badge Veteran
- ☐ Armed Forces Service Medal Veteran
- ☐ I am a protected veteran, but I choose not to self-identify the classifications to which I belong.
- ☒ I am NOT a protected veteran.

Cancel Update



Employee Dates

Within Employee Dates, enter any applicable date information you would like to remain in Paycom. Employers usually record important dates, such as Hire Date, Rehire Date, Seniority Date, Termination Date and Birth Date. Dates the employee was added and reported on the New Hire Report are stored automatically, as well.

The Most Recent Check Date field allows you to see an employee's last check date. This is beneficial when you have several seasonal employees who may not receive a check for a long period of time. This allows you to audit active employee records and keep head counts accurate. This field is an option on the Advanced Report Writer.

Form 3 - Dates and HR

[View Change History](#)

Employee Dates | Human Resources Information | Contact Information | Organizational Relationships | Government Reporting | Sensitive Compliance Fields | Custom Fields

Hire Date	08/17/2006	15 Years 0 Months 9 Days	Termination Date	00/00/0000	
Rehire Date	00/00/0000	N/A	Previous Termination Date	N/A	
Seniority Date	08/17/2006	15 Years 0 Months 9 Days	Termination Type	(none) (Options)	
Termination Reason				Last Pay Change	02/01/2021
Last Worked Date	00/00/0000		On-Leave End	00/00/0000	
Birth Date	09/03/1975	Age 45	Next Review	00/00/0000	Details
On-Leave Start	00/00/0000		401(k) Participation Date	00/00/0000	
Last Review	02/11/2021		Match Eligibility Date	00/00/0000	
401(k) Eligibility Date	00/00/0000		Full-Time to Part-Time Date	00/00/0000	
Last Position Change Date	01/11/2021		New Hire Report Date	00/00/0000	
Employee Added	08/09/2020		Most Recent Check Date	09/25/2020	
Part-Time to Full-Time Date	00/00/0000				

[Cancel](#) [Update](#)



The Seniority Date field ensures your employees' length of service aligns with your organization's policies. By default, the employee's hire date will display in the Seniority Date field. However, you can enter a custom date, if necessary. The employee's years of service display next to the Seniority Date field so you can quickly view the employee's tenure.

Elapsed time between hire and rehire date is not included in the length of service calculation.

If the employee has a date entered in the Rehire Date field, you can determine whether Paycom updates the seniority date to reflect the rehire date.

After you update the employee's form, the following pop-up window will display. If you want to factor previous time into seniority, click "Update Rehire Date Only." The seniority date entered will remain as is and Paycom will update the rehire date. If you click "Update Both," Paycom will update the seniority date to match the employee's rehire date.



The Last Worked Date field allows you to record last worked dates in addition to termination dates. For example, if you have a no-call, no-show policy, you may terminate employees for job abandonment if they don't show up to work after two days. In this situation, the employee's last worked date would be two days prior to their termination date. Recording the employee's last worked date in Form 3: Dates and HR ensures the employee isn't paid for the two days they didn't work.

Form 3 - Dates and HR

Employee Dates | Human Resources Information | Contact Information | Organizational Relationships | Government Reporting | Sensitive Compliance Fields | Custom Fields

View Change History

Hire Date	08/17/2006	15 Years 0 Months 3 Days	Termination Date	08/20/2021	
Rehire Date	00/00/0000	N/A	Previous Termination Date	N/A	
Seniority Date	08/17/2006	15 Years 0 Months 9 Days	Termination Type	Job Abandonment (Options)	
Termination Reason	No-Call No-Show			Last Pay Change	02/01/2021
Last Worked Date	08/18/2021		On-Leave End	00/00/0000	Details
Birth Date	09/03/1975	Age 45	Next Review	00/00/0000	
On-Leave Start	00/00/0000		401(k) Participation Date	00/00/0000	

Click "Options" next to the Termination Type drop-down menu to determine which options are available for selection.

Form 3 - Dates and HR

Employee Dates | Human Resources Information | Contact Information | Organizational Relationships | Government Reporting | Sensitive Compliance Fields | Custom Fields

View Change History

Hire Date	08/17/2006	15 Years 0 Months 3 Days	Termination Date	08/20/2021	
Rehire Date	00/00/0000	N/A	Previous Termination Date	N/A	
Seniority Date	08/17/2006	15 Years 0 Months 9 Days	Termination Type	Job Abandonment (Options)	
Termination Reason	No-Call No-Show			Last Pay Change	02/01/2021
Last Worked Date	08/18/2021		On-Leave End	00/00/0000	Details
Birth Date	09/03/1975	Age 45	Next Review	00/00/0000	
On-Leave Start	00/00/0000		401(k) Participation Date	00/00/0000	



Enter a termination type in the Options field and click “Add New Option.”

Home > Make Employee Changes > Employee Custom

Add Selectable Options For TERMINATION TYPE

Options [Add New Option](#) [Save Option Order](#)

[Sort in Alphabetical order](#)

i Drag and drop to order options

1		X
2	Eligible for Rehire	X
3	Involuntary	X
4	Voluntary	X
5	Not Eligible for Rehire	X

[Cancel](#) [Return to Form 3 - Dates and HR \(ABBY, HANNUAH\)](#)



Human Resources Information

In Human Resources Information, you will enter information, such as Department of Labor Status, ACA Status, marital status and more.

Also, you can update your employees' benefits eligibility when you change their DOL Status. After selecting the new status, additional options will appear for you to select from.

Form 3 - Dates and HR

[View Change History](#)

Employee Dates **Human Resources Information** **Contact Information** **Organizational Relationships** **Government Reporting** **Sensitive Compliance Fields** **Custom Fields**

401(k) Participation Number	<input type="text"/>	401(k) Hours	<input type="text" value="0.00"/>
401(k) Hours Calculation Rule	<input type="text" value="Manual Entry"/> ⚙	ACA Status	New Hire ⚙ Date is accurate as of 11/15/2019 09:58:30 AM ⓘ
DOL Status	<input type="text" value="Full Time"/>	Union Code	<input type="text"/>
Exempt Status	<input type="radio"/> Exempt <input checked="" type="radio"/> Non-Exempt	Highly Compensated Employee ⓘ	<input type="text" value="Not an HCE"/>
Current Key Employee	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Marital Status	<input type="text" value="(unset)"/>		
Retirement Plan	<input type="checkbox"/> Check this box if the employee participated in a retirement plan but contributions were not automatically deducted from his or her paycheck.		
	Note: w/o paycheck deductions		
Statutory Employee ⓘ	<input type="checkbox"/> Check this box if the employee is considered a statutory employee.		
Flag Employee as Supervisor	<input type="checkbox"/> Check this box to flag this employee as a supervisor.		
Non-Resident Alien	<input type="checkbox"/> Check this box if this employee is a non-resident alien.		
Position Title	HR Generalist		
Position Seat	00032 - HR Generalist Time in Position: 0 Years 1 Months 28 Days Reports To: HR Manager - [vacant] <input type="button" value="Change"/>		
Location	<input type="text" value="Kansas City"/>		
Notes	<input type="text"/>		



Contact Information

In the Contact Information tab, the employee's work and personal email will display, which is useful in other modules throughout Paycom. Your employees and managers can receive email notifications on their personal and/or work email address. You can specify whether emails should go to work, personal or both, and therefore notify appropriately.

While we hope you never have to reach out to an employee's emergency contact, this information is stored here, as well. If the employee has designated a primary emergency contact, that contact will display first with "Primary" next to their name.

Form 3 - Dates and HR

Employee Dates | Human Resources Information | **Contact Information** | Organizational Relationships | Government Reporting | Sensitive Compliance Fields | Custom Fields

[View Change History](#)

[Add Contact](#)

Emergency Contact	Phone Number	Relationship	Edit	Delete
Jim Nelson (Primary)	4051234567	Husband		
Hannah Abby	4059876543	Mother		

Showing 1 to 2 of 2 entries

Work Email

Personal Email

[Cancel](#) [Update](#)



Organizational Relationships

From here, you can assign supervisors. This is important for Paycom's Time-Off Requests. If you use this module, assign a Time-Off Supervisor so they can approve time-off requests. You can mark whether the supervisor should receive an email notifying them the employee has requested time off. You can do this for each supervisor and also receive emails when the employee approves their timecard or when they make changes to specific fields.

If no email address is shown next to a supervisor's name, it will need to be added. The Time-Off Approval Supervisor's email address will be added under User Access and Security. Primary, secondary, tertiary, quaternary and talent management supervisor's email addresses should be added in Form 3: Dates and HR.

Form 3 - Dates and HR

Employee Dates | Human Resources Information | Contact Information | **Organizational Relationships** | Government Reporting | Sensitive Compliance Fields | Custom Fields | [View Change History](#)

Time-Off Approval Supervisor ⓘ WARY, CALI (cwary01)
Email Notification For ☐ Time-Off Requests ☐ Timecard Approval ☐ Punch Changes ☐ Employee Changes ☐ Schedule Exception Points

Primary Supervisor Madden, Mandy (mmadden)
Email Notification For ☐ Time-Off Requests ☐ Timecard Approval ☐ Punch Changes ☐ Employee Changes ☐ Schedule Exception Points

Secondary Supervisor Search or Make Selection
Email Notification For ☐ Time-Off Requests ☐ Timecard Approval ☐ Punch Changes ☐ Employee Changes ☐ Schedule Exception Points

Tertiary Supervisor Search or Make Selection
Email Notification For ☐ Time-Off Requests ☐ Timecard Approval ☐ Punch Changes ☐ Employee Changes ☐ Schedule Exception Points

Quaternary Supervisor Search or Make Selection
Email Notification For ☐ Time-Off Requests ☐ Timecard Approval ☐ Punch Changes ☐ Employee Changes ☐ Schedule Exception Points

Talent Management Supervisor Search or Make Selection
☐ Mirror Current Primary Supervisors

Payout Time-Off Supervisor(s)
Payout Supervisor(s)
Search: [Select All](#)
☐ Ness, Katie
☐ Madden, Mandy

Paycom Learning Supervisor(s)
Training Supervisor(s)
Search: [Select All](#)
☐ Ableton, Benjamin
☐ THOMAS, Anna
☒ Asano, BRITTANY
☐ KILUNG, Blake
☐ WARY, CALI
☐ Asano, David
[Show Selected Filters](#)

[Cancel](#) [Update](#)



Government Reporting

This screen allows you to enter the employee's Standard Occupational Classification code. You can also designate the employee as a new hire for reporting purposes.

Form 3 - Dates and HR

Employee Dates | Human Resources Information | Contact Information | Organizational Relationships | **Government Reporting** | Sensitive Compliance Fields | Custom Fields

View Change History

VETS-4212 Job Category: (none)

SOC Code: -

EEO-1 Category: First/Mid-Level Officials and Managers

New Hire: ☐ Check this box to include employee in next new hire report.

Available Health Insurance: ☐ Check this box to set 'YES' in New Hire report. Required for employees in KY, MD, ND.

Available Dependent Insurance: ☐ 00/00/0000 Check this box to include date in next new hire report.

Cancel Update

Sensitive Compliance Fields

Information on this tab should not be changed after an employee has identified. If your company participates in EEO-1 reporting and an employee chooses not to answer the questions, you may select an option for them in the EEO-1 fields.

When you are finished making changes to this form click "Update."

Form 3 - Dates and HR

Employee Dates | Human Resources Information | Contact Information | Organizational Relationships | Government Reporting | **Sensitive Compliance Fields** | Custom Fields

View Change History

Gender: ☐ Male ☒ Female

EEO-1 Ethnicity: White

EEO-1 Disability Status: ☐ Yes ☒ No

VETS-4212 Employee Category: ☐ Disabled Veteran ☐ Recently Separated Veteran ☐ Active Wartime or Campaign Badge Veteran ☐ Armed Forces Service Medal Veteran ☐ I am a protected veteran, but I choose not to self-identify the classifications to which I belong. ☒ I am NOT a protected veteran.

Military Discharge Date: 00/00/0000

Cancel Update



Form 4: Percentage Labor Distribution

Percentage Labor Distribution allows you to allocate an employee's earnings to multiple departments on each payroll. Check the "Enable Labor Distribution for this Employee" box. Then select the department to allocate the earnings and the ratio in which to assign.

The ratio is in decimal format and the total allocated amount must equal 100. You also need to assign the tax profile for the allocation. When you are finished making changes click "Update."

If using Paycom's Labor Allocation feature, be sure to make a selection in each drop-down menu.

Form 5: 3rd Party Payees

If you receive a garnishment order for one of your employees and you need a check cut for the garnishment amount to a third party, insert the information for the 3rd Party Payee on this form. You can make changes to an existing 3rd Party Payee by clicking "Make Changes" or add a new 3rd Party Payee by clicking "Add New 3rd Party Payee."

For more information on 3rd Party Payees and Garnishments, visit the Garnishments guide on the Help Menu.



Form 6: Accrual Information

Assign accrual profiles to employees through Form 6: Accrual Information. Within the Accruals Summary table, view applicable dates, limits and transaction history for each accrual tied to the employee.

When you are finished making changes to this form click "Update."

Batch Edit	Description	Status	Schedule	Policy	New Hire Rule	Accrual Rate	Beginning	Awarded	Taken	Available	Total Accrued	Dates	Limits	History	Edit
<input type="checkbox"/>	PTO	Active	Once per Week	PTO	New Hire	4.81	220.00	400.00	52.00	568.00	568.00				
<input type="checkbox"/>	SICK	Active	Once per Week	PTO	New Hire	4.81	120.00	128.86	24.00	224.86	224.86				

Form 7: Employee Photo

You can upload a photo of the employee that will appear on the employee's menu and main menu of Employee Self-Service®. This feature can help ensure changes are made to the correct employee's file.

To upload a photo, click "File" and locate the file you wish to upload. Clicking "Preview" allows you to preview the file. *There is a maximum file size of 3 MB for the photo and only PNG, JPG, JPEG and GIF file types are accepted.*



Form 8: Custom Fields

Custom fields allow you to store additional HR information using drop-down, text and date fields. You have the option to create up to nine pages of Custom Fields to store information. Information entered in Custom Fields can be used to create reports and track additional information you may need about employees.

To go to other Custom Fields pages, click the appropriate tab beneath the Custom Forms header. To create more selections or remove selections from the drop-down menus of the Custom Select Fields, click the gear icon.

To add a new option to the drop-down menu, enter the description and click “Add New Option.” To delete an existing option, click the “X” next to the option to be removed.

When you are finished making changes to this form, click “Update.”



Form 9: Employee Self-Service®

Employee Self-Service® offers employees online access to their personal information, including contact information, pay rates, tax setup and a listing of their checks. The Employee Self-Service® feature is used throughout Paycom.

Make sure employees' logins are enabled. You can also assign employees to an Expense Management Class (if using Expense Management) and an ESS profile, if needed.

- **ESS Login Enabled:** This drop-down menu allows you to enable or disable an employee's login. Enabled means the employee can log in to Employee Self-Service®.
- **Username:** The employee's username used when the employee logs in. This was set up when adding the new employee. This form provides you quick access to retrieve the username if forgotten by an employee.
- **Password:** The allows you to override the employee's password and make it a one-time password. Paycom will then prompt the employee to change the password as soon as they login.



- **Expense Management Class:** If you have Paycom's Expense Management module, you can select the Expense Management Class you would like to assign to the employee. Expense Management allows you to manage your employee's expenses by tracking how much is spent and where.
- **Profile:** Profiles allow you to control what the employee can and cannot see on Employee Self-Service®. If you have created ESS Access Profiles, assign the profile to the employee by making the appropriate selection from the drop-down menu. If no ESS Access Profile is assigned, the default profile will apply.
- **View ESS as Employee:** This permission allows the user to log into Employee Self-Service® as the employee to view the employee's permissions. While logged in as the employee, no edits can be made, and the employee may also be logged in at the same time as the user.



Form 10: Time and Attendance

Time and Attendance allows you to track employees' time. This module can connect to hardware terminals, or your employees can clock in and out through Employee Self-Service®.

On Form 10: Time and Attendance, you will need to be sure to assign the new employee to a Pay Class, Terminal Access Group and Schedule Group, if applicable.

If you are using a standard hardware clock, you will need to enter the employee's badge number.

A message will display at the bottom of the screen reminding you to update the hardware clock terminal when making changes that potentially could impact the hardware clock.

The screenshot shows the 'Form 10 - Time and Attendance' interface for employee WHITE, SANDRA (A002). The form is divided into several sections:

- Employee Information:** Includes a profile picture, name, active status, hire date, and a dropdown for '10 - Time and Attendance'. Buttons for 'List All' and 'Add New Employee' are present.
- Form 10 - Time and Attendance:** Contains a 'View Timecard' button and a 'View Change History' link.
- Time and Attendance Profile:**
 - Pay Class:** Dropdown menu set to 'Hourly - [HRY]'.
 - Terminal Access Group:** Dropdown menu set to 'Hourly - [HET]'.
 - Primary Schedule Group:** Dropdown menu set to 'Bakery - [2000]'.
 - Additional Schedule Groups:** A search box with a list of options: 'Bakery - [2000]', 'Sanitorial - [920]', 'Wait Staff - [1197]', and 'Weekend Bar Tender - [1100]'. A 'Select All' button is also present.
 - Schedule Time Zone:** Dropdown menu set to 'Search or Make Selection'.
 - Exception Rule:** Dropdown menu set to '(none)'.
 - Earnings Profile:** Dropdown menu set to 'Search or Make Selection'.
 - Rates by Allocation:** Text input '1 rate(s) enabled' with an 'Edit' button.
 - Labor Allocation Profile:** Dropdown menu set to 'none'.
 - Minimum Wage Profile:** Text input '(DEF) Default'.
- Software Terminal Access:**
 - Employee Self-Service @ Login Enabled:** Dropdown menu set to 'Enabled'.
 - Employee Self-Service @ Username:** Text input '05082A002'.
 - Last 4 Digits of Social Security Number:** Text input '1084'.
 - Employee Self-Service @ Password:** Text input field.
 - Employee Self-Service @ Security Questions:** Text input 'Yes (Clear)'.
- Hardware/Kiosk Terminal Access:**
 - Badge Number:** Text input field with a note '(Numeric characters only)' and an 'Auto Assign' button.
 - Badge Level:** Dropdown menu set to '(normal)'.
 - Supervisor PIN:** Text input field.

At the bottom, there is a note: '(Note: Changes will not be applied unless you click "UPDATE")' and buttons for 'Cancel' and 'Update'.



Form 11: Direct Deposit

Form 11: Direct Deposit allows you to view bank account information for the employee to receive their paycheck. There are two options for direct deposit:

- **Main Account (Net Pay):** The account where the total direct deposit is sent if no distributions are set up. If distributions are set up, the distributions are taken off the net amount first and then the remaining amount is sent to the account in the NET pay.
- **Direct Deposit Distributions:** Additional accounts to have a fixed dollar amount or percent of the net amount to be allocated. There can be up to eight distributions set up per employee.

To increase or decrease the number of Direct Deposit Distributions your organization has enabled, please contact your dedicated Paycom representative.

The Deposit Method drop-down menu indicates whether the deposit method for a main account and/or distribution is a bank account or pay card. This ensures each deposit method is saved in Paycom for easy reporting.

As a best practice, employees should update their direct deposit information in Employee Self-Service®. Changes to Form 11: Direct Deposit should only be made in special circumstances.

Make Employee Changes > Employee Menu > Form 11 - Direct Deposit

ABBY, HANNAH (8971)
ACTIVE W-2
Accounting (500)...
Hired 07/05/2017
View Full Profile
11 - Direct Deposit

< ABBY, HANNAH (8971) >
List All
Add New Employee

Form 11 - Direct Deposit

View Change History

Main Account (Net Pay) Clear Fields

Net Deposit	Deposit Method	Bank Name	Routing Number	Account Number	Checking/Savings	Distribution Amount
	Bank Account				<input type="radio"/> Checking <input type="radio"/> Savings	n/a

Would you like to fund all distributions before funding the remainder check (Net Pay)?
☒ No ☐ Yes

Direct Deposit Distribution

1st Distribution Deposit Method: Bank Account

Bank:
Routing #: Acct #: ☐ Checking ☐ Savings
Amount: \$ OR % Status: (None Selected)

2nd Distribution Deposit Method: Bank Account

Bank:
Routing #: Acct #: ☐ Checking ☐ Savings
Amount: \$ OR % Status: (None Selected)



Form 12: Year-to-Date Totals

On the Check Listings tab you can view all checks listed within that year. You have the option to view multiple earnings statements simultaneously for an individual employee, making it convenient to print multiple statements at once, rather than one at a time. Check the box next to each check you would like to view, then click the print icon. The next screen will display the full breakdown of all checks paid to the employee.

Form 12 - Check Totals and Listings

Check Listings | Year-to-Date Totals

All Payroll Profiles for 01/01/2019 - 12/31/2019

2019 | Check Listing Profile

Search | 3 records selected

Select	Check	Check Date	Tax Profile	Net Pay
<input checked="" type="checkbox"/>	13863	10/31/2019	NH/MO/MO(1)	\$299.75
<input checked="" type="checkbox"/>	13247	06/17/2019	NH/MO/MO(1)	\$1,180.12
<input checked="" type="checkbox"/>	13144	05/03/2019	NH/MO/MO(1)	\$599.17
<input type="checkbox"/>	13041	04/19/2019	NH/MO/MO(1)	\$937.74
<input type="checkbox"/>	12949	03/22/2019	NH/MO/MO(1)	\$1,023.29
<input type="checkbox"/>	12927	02/19/2019	NH/MO/MO(1)	\$1,196.19
<input type="checkbox"/>	12838	02/08/2019	NH/MO/MO(1)	\$1,007.37
Total				\$6,808.63

The Year-to-Date Totals tab shows the year-to-date totals for the employee for the current year. The four categories within this form are Earnings, Employee Taxes, Deductions and Net Pay. To select prior years, select a different year from the drop-down menu at the top of the form.

Form 12 - Check Totals and Listings

Check Listings | Year-to-Date Totals

All Payroll Profiles for 01/01/2019 - 12/31/2019

2019 | Check Listing Profile

Earnings

Code	Description	Hours/Units	Amount
R	Regular	435.00	\$7,258.14
O	Overtime	45.50	\$1,143.59
WOT	Weighted OT	13.50	\$335.50
S	Sick	8.00	\$134.80
BON	Bonus	0.00	\$500.00
PST	Piece Rate	1.00	\$0.00
Gross		502.00	\$9,372.13

Employee Taxes

Code	Description	Amount
FWT	Federal W/H	\$1,043.39
MED	Medicare	\$135.89
SSC	Social Security	\$551.07
MOW	Missouri State W/H	\$298.00
Total		\$2,058.35

Deductions

Code	Description	Amount
40P	401 K %	\$294.10
EXP	Expense Reimbursement	\$150.00
LIF	Life Deduction	\$1.05
CSD	Company Sponsored No Ded *	\$17.30
Total		\$462.45

Net Pay

Code	Description	Amount
NET	Net Check	\$6,808.63
Total		\$6,808.63



Form 13: Employee Benefits

If you have Paycom's Benefits Administration module, you can view the employee's current benefits, view qualifying events and assign them to an Eligibility Profile all from Form 13: Employee Benefits. The Benefits Administration module allows you to ensure the correct deductions are taken from employees' paychecks for benefits. This module also allows you to report on information about benefits.

Form 13: Employee Benefits is broken into the following tabs:

- Employee Benefits
- Dependent Benefits
- Beneficiary Benefits
- Enrollment
- Qualifying Events
- COBRA

At the top of the screen, click the blue Benefits Eligibility Profile link to change the employee's Benefits Eligibility Profile.

Form 13 - Employee Benefits

Benefits Eligibility Profile [ALL] Full Time Employees

Employee Benefits Dependent Benefits Beneficiary Benefits Enrollment Qualifying Events COBRA

A pop-up window will display. Use the Benefits Eligibility Profile drop-down menu to make the appropriate selection. Then, click "Update."

Benefits Eligibility Profile

Effective Date 09/23/2019 (v1.0) + Changes

Benefits Eligibility Profile [ALL] Full Time Employees

Update



Through the Batch Actions drop-down menu, you can efficiently batch approve and terminate your employee's benefit plans, as well as send benefits to payroll and change dates. The options available for selection will vary based on the available actions within the employee's Form 13: Employee Benefits. For example, in the image below, the employee does not have any benefits to approve, so the option to Approve does not display in the Batch Actions drop-down menu.

Quickly view the details of a benefit plan by clicking the blue hyperlink in the Plan Name column.

Additional details for the selected benefit plan will display. Navigate directly to the benefit plan setup by clicking the Employee Benefit name. The selected benefit plan will open in a new browser window.

Make Employee Changes > Employee Plan: Life Plan Basic

ABBY, HANNAH (8971)
ACTIVE W-2
Human Resources (500) ...
Hired 09/23/2019
View Full Profile

13 - Employee Benefits

ABBY, HANNAH (8971) List All Add New Employee

Employee Benefits **Life Plan Basic (LP19)** Approved Actions

Company Paid Deduction Go to the benefit plan SSD Company Sponsored No Ded

Company Sponsored Premium \$25.00

Total Life Policy Amount 25000

Age 26

Coverage Start Date 11/01/2019

Coverage Stop Date 12/31/2019

Deduction Start Date 11/01/2019

Deduction Stop Date 12/31/2019

Benefits Eligibility Profile (ALL) Full Time Employees

Enrollment Reason New Hire

Signature Date 00/00/0000

Original Effective Date 11/01/2019

Carrier Status Active

Individual Policy #

Employee B2C data 1 (Optional)

Employee B2C data 2 (Optional)

Beneficiaries

Return Update



Form 14: Dependents and Beneficiaries

Form 14: Dependents and Beneficiaries contains the employee's dependent and beneficiary information. This information works with Paycom's Benefits Administration module. You can allow employees to manage this information in Employee Self-Service®.

Dependents

View or add dependents on the Dependents tab of Form 14: Dependents and Beneficiaries. If you need to add a new dependent, click "Add Dependent."

You have the option to allow dependents to be added without a Social Security number. A check box labeled "SSN Not Available" will appear if this option is enabled. Contact your dedicated Paycom specialist to enable this feature.

Form 14 - Dependents and Beneficiaries

View Change History

Dependents Beneficiaries

Search

Dependent	Display Code	Birthdate	Relationship	Status	Gender	Full-Time Student	Disabled	Tobacco User	Document Count	View Benefits	Delete
Abby Alexis	89710001	12/01/2014 Age 4 years	Son or Daughter	Active	Female	No	No	No	0	View Benefits	

Add Dependent



Use the Relationship drop-down menu to select the appropriate dependent relationship. If you select "Court Ordered Dependent," the Visible Fields in ESS option will display. Here, you can control the specific dependent demographic information that the employee can view in Employee Self-Service®. This is beneficial, for example, if an employee is ordered to cover their ex-spouse on their benefit plan, but you do not want the employee to be able to access the ex-spouse's Social Security number or address.

Use the Visible Fields in ESS box to select which fields should be visible to the employee in Employee Self-Service®. The First Name field is required to display in Employee Self-Service® and cannot be unselected.

The screenshot shows the 'Add Dependent' form with the following fields and options:

- Recipient Status:** Active
- Add As:** Beneficiary (selected), Dependent And Beneficiary
- Relationship:** Court Ordered Dependent (selected)
- First Name:** [Text Field]
- Middle Name:** [Text Field]
- Last Name:** [Text Field]
- SSN Not Available:** [Checkbox]
- Social Security Number:** [Text Field]
- Birth Date:** [Text Field]
- Gender:** Male
- Full-Time Student:** [Checkbox]
- Tobacco User:** [Checkbox]
- Disabled:** [Checkbox]
- Address:**
 - Same Address as Employee:** [Checkbox]
 - Street:** [Text Field]
 - City:** [Text Field]
 - State:** Alabama
 - ZIP:** [Text Field]
 - Phone:** [Text Field]
 - Email Address:** [Text Field]
- Include Document:** [Choose Files] No file chosen
- Visible Fields in ESS:**
 - ☒ First Name
 - ☒ Middle Name
 - ☒ Last Name
 - ☒ Social Security Number
 - ☐ Social Security Number (Truncated)



The newly added dependent will display on the employee's Form 14: Dependents and Beneficiaries under the Dependents tab. Click a dependent's name to edit the information.

Form 14 - Dependents and Beneficiaries

View Change History

Dependents Beneficiaries

Add Dependent

Search

Dependent	Display Code	Birthdate	Relationship	Status	Gender	Full-Time Student	Disabled	Tobacco User	Document Count	View Benefits	Delete
Abby, Alexis	89710801	02/22/2021 Age 0 years	Son or Daughter	Active	Female	No	No	No	0	View Benefits	Delete

Make the appropriate changes in the Edit Dependent pop-up window. If you attempt to edit the dependent's relationship, a warning message will display to inform you that the dependent is currently tied to a benefit plan. Changing the dependent's relationship will not remove the dependent and could allow a dependent of the wrong relationship type to remain tied to the benefit plan.

Additionally, if the dependent is tied to an active or future benefit plan, the Recipient Status drop-down menu will be disabled. This ensures only active dependents are tied to benefit plans.

Edit Dependent

* Indicates Required Field

Recipient Status Active

Relationship * Son or Daughter

First Name * Dependent is currently tied to benefit plans. This change will not remove the dependent and could allow a dependent of the wrong relationship type to remain tied.

Middle Name



Click the “View Benefits” link to view a summary of the dependent’s benefits.

Form 14 - Dependents and Beneficiaries

[View Change History](#)

Dependents **Beneficiaries**

[Add Dependent](#)

Search

Dependent	Display Code	Birthdate	Relationship	Status	Gender	Full-Time Student	Disabled	Tobacco User	Document Count	View Benefits	Delete
Abby, Alexis	89710001	02/22/2021 Age 0 years	Son or Daughter	Active	Female	No	No	No	0	View Benefits	

The dependent’s eligible, current and declined benefits will display for review.

[Home](#) > [Make Employee Changes](#) > [Employee Menu](#) > [Benefits for Alexis Abby](#)

ABBY, HANNAH (8971)
ACTIVE W-2
Accounting (506)...
Hired 07/05/2017
[View Full Profile](#)

[List All](#) [Add New Employee](#)

14 - Dependents and Beneficiaries

Benefits for Alexis Abby

Eligible Benefits

Plan Name	Plan Year(s)	Type
-----------	--------------	------

Current Dependent Benefits

Plan Name	Status	Plan Year(s)	Type	Benefit Effective Date	Coverage End Date	COBRA Start Date	COBRA End Date
Medical (MD21)	Active	2021 - 2021	Employee and Children	02/22/2021	12/31/2021	N/A	N/A

Declined Benefits

Plan Name	Plan Year(s)	Type
-----------	--------------	------

[Back To Dependents](#) [View Dependent Benefits](#)

Beneficiaries

To view the employee’s designated beneficiaries, click the “Beneficiaries” tab on Form 14: Dependents and Beneficiaries. From this tab, click the “View Benefits” link to navigate to the employee’s Form 13: Employee Benefits to view benefit plans quickly and easily.

Form 14 - Dependents and Beneficiaries

[View Change History](#)

Dependents **Beneficiaries**

[Add Beneficiary](#)

Search

Beneficiary	Display Code	Relationship	Status	View Benefits	Delete
Abby, Alexis	89710001	Son or Daughter	Active	View Benefits	



Form 15: Documents

Form 15: Documents allows you to add and store documents for an employee. You can assign the employee to a Document Group, change an employee's current Document Group and add or view documents assigned to the employee.

For more information, visit the Documents and Checklists Guide on the Help Menu

Form 15 - Documents

Documents | Downloaded Documents

Signed documents are unable to be batch deleted. Please use the Actions button to individually delete signed documents, as this action cannot be undone. Unsigned documents are able to be batch deleted.

Employee Document Group: **Employees- All [ALL]** Update

Search Documents:

Document Actions: 25

Folders

Search Folders:

All Active Documents 1

Home 1

Select	Document Name	File/Template	Version	Employee Acknowledgment and/or Signature	Supervisor Acknowledgment and/or Signature	Last Reminder	Last Modified	Actions
<input type="checkbox"/>	Personnel Action ...	Personnel Action ...	N/A	N/A	N/A	N/A	09/23/2019 10:51:13 AM bhoman	Actions
<input type="checkbox"/>	Personnel Action ...	Personnel Action ...	N/A	N/A	N/A	N/A	05/12/2019 05:56:31 PM bhoman	Actions
<input type="checkbox"/>	Employee Handbook	6 Employee Handb...	1	Missing	N/A	N/A	01/01/2019 12:47:06 AM System	Actions
<input type="checkbox"/>	Personnel Action ...	Personnel Action ...	N/A	N/A	N/A	N/A	10/29/2018 07:24:27 AM bhoman	Actions

Showing 1 to 4 of 4 entries

Previous 1 Next

Go to Page:

Form 16: Checklists

Form 16: Checklists allows you to assign a checklist of tasks to an employee. You can assign the employee a checklist and view completed tasks from this form.

For more information, visit the Documents and Checklists Guide on the Help Menu.

Form 16 - Checklists

Assign Checklist(s)

View Change History

Existing Checklists

Search:

Select	List ID	Checklist Description	Checklist Type	Number of Items	Percent Completed	Date of Completion	Last Reminder	Reminder	Delete
<input type="checkbox"/>	8589	New Hire Checklist	On Boarding	21	10	N/A	N/A		



Form 17: Year-End Tax Forms

Form 17: Year-End Tax Forms allows you to view, edit or enter additional information for the employee that needs to be reported on their Form W-2, Form 1099 or Affordable Care Act (ACA) form. These entries will appear on the applicable tax forms at the end of the year.

The IRS allows Social Security numbers and Taxpayer Identification numbers to be masked on Form W-2 and 1099 to help protect employees from identity theft. If you check the box for “Mask SSN/TIN,” only the last four digits of the employee’s Social Security number or Taxpayer Identification number will display on the employee’s copy of Forms W-2 or 1099.

Make Employee Changes > Employee Menu > Form 17 - Year-End Tax Forms

NELSON, SOPHIA FLYNN (0234)
ACTIVE W-2
IT (400)
Hired 06/17/2019
View Full Profile

17 - Year-End Tax Forms

List All

Add New Employee

Form 17 - Year-End Tax Forms

View Change History

W-2 ACA

Search

Reporting Year	Company Name	W2 Box	W2 Box Value	W2 Posted Date	View W2 Form	Corrected Form
2020	PAYCOM UNIVERSITY	[1200]Cost of employer-sponsored health coverage			N/A	
2019	PAYCOM UNIVERSITY	[1200]Cost of employer-sponsored health coverage			N/A	

Mask SSN/TIN ☒

Submit

i This employee has elected to receive only electronic copies of Form W-2.



Through the ACA tab, you can view the period used to calculate an employee's current ACA status by hovering your cursor over the ACA status.

Form 17 - Year-End Tax Forms View Change History

W-2 **ACA**

General ACA Information

ACA Initial Status ? ACA Variable Hour ACA Qualifying Offer Date ? 07/10/2017

? Data is accurate as of 11/15/2019 08:50:30 AM ? Reporting Year 2019

Hours Worked in 2019

January	February	March	April	May	June	July	August	September	October	November	December
156.28	180	102	117.5	0.00	0.00	0.00	0.00	45.59	176.66	-	-

Benefit Information

View Explanation of Codes

Form 1095-C Line	All Months	January	February	March	April	May	June	July	August	September	October	November	December
Offer of Coverage Indicator View Series 1 Codes	-	1H	1H	1H	1H	1H	1H	1H	1H	1H	1H	-	-
Employee Share of Lowest Cost Self-Only Coverage	-	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	-	-
Safe Harbor View Series 2 Codes	-	-	-	-	2B	2A	2A	2A	2A	2D	2D	-	-
Enrolled in Self-Insured Coverage	-	No	No	No	No	No	No	No	No	No	No	-	-
ACA Status ?	-	Full Time	Full Time	Full Time	Full Time	Not Employed	Not Employed	Not Employed	Not Employed	New Hire	New Hire	-	-
Edited ?	-	Status based on the average hours worked for the Measurement Period 01/01/2018 - 04/30/2018											

1095 Form Status Not Approved Safe Harbor ? W2 Wages ▼



Form 20: Compensation and Performance History

Form 20: Compensation and Performance History allows you to view an employee's position, department, performance and compensation history and all of the employee's performance reviews. This form works with Paycom's Talent Management suite.

Form 20 - Performance and Compensation History									
Employee History	PAF History	Performance Discussion History	Performance Reviews	Employee Performance Preview	Performance Tracking				
Position									
Department: Human Resources		Title: HR Generalist		Family: Human Resources					
Rates									
Annual Base Pay: \$36000.00		Pay Type: Salary		Pay Frequency: Semi-Monthly		Rate 1 : \$1500.00			
Salary Grade									
Description: Employee (EMP)		Minimum: \$12.00		Midpoint: \$15.00		Maximum: \$18.00			
Compa-Ratio: N/A									
Position/Department History									
Change Date	Department	Location	Position	Position Level	Position Family	Position Dates	Time In Position		
11/20/2019	Human Resources[500]	Kansas City	HR Generalist		Human Resources	09/23/2019 - Current	1 Month, 29 Days		
09/23/2019	Human Resources [500]	Phoenix	HR Generalist		Human Resources	09/23/2019 - Current	1 Month, 29 Days		
07/07/2017	IT[400]		Technical Support Representative		Information Technology	07/07/2017 - 09/23/2019	2 Years, 2 Months, 16 Days		
07/05/2017	IT[400]		Developer		Development	07/05/2017 - 07/07/2017	2 Days		
Compensation History									
Effective Date of Pay Rate/Salary Change	Reason for Pay Change	Pay Frequency	Standard Hours Per Pay Period	Rate Changed	Old Rate	New Rate	Percent Change	Amount Change	New Annual Amount
09/23/2019	Make Active (PAF)	Semi-Monthly	85.67	Rate1	\$16.85	\$36,000.00	2.72%	\$952.00	\$36,000.00
01/15/2019	Manual Change (Employee)	Bi-Weekly	80	Rate1	\$0.00	\$16.52		\$16.52	\$34,361.60
09/17/2018	Merit Increase (Comp)	Bi-Weekly	80	Rate1	\$2,130.00	\$2,236.50	5.00%	\$106.50	\$58,149.00
08/31/2018	Salary Change (PAF)	Bi-Weekly	80	Rate1	\$2,236.50	\$2,348.93	5.00%	\$111.83	\$61,056.58
07/05/2017	Added to System	Bi-Weekly	80	Rate 1		\$2,130.00			\$55,380.00



Form 21: Learning

Form 21: Learning allows you to track an employee's learning progress and view employees' certifications. View assigned, requested and completed learning along with quiz results and notes. Certification status, date and time of verification and certification/license numbers can be viewed under the Certifications tab.

Form 21 - LearningEnroll in Learning

Existing Learning

Quiz Results

Performance Evidence

Certifications

Notes

In Progress Learning

Actions

Search

Previous1Next

25

Select	Type	Name	Topic	Number of Content Items	Description	Length	Date Assigned	Due Date	Expiration Date	Progress	Course/Path Notes
<input type="checkbox"/>	Course	Excel Training	New Hire	1		01H : 00M	09/10/2020	09/24/2020	No Expiration Date	0%	
<input type="checkbox"/>	Course	Virtual Meetings	Virtual Meetings	2		01H : 05M	09/11/2020	09/25/2020	No Expiration Date	0%	

Showing 1 to 2 of 2 entries

Previous1Next

Go to Page

Learning Requests

Actions

Search

PreviousNext

25

Type	Name	Requested Date	Note	Employee Request Notes	Approve/Deny
No Records Found					

Showing 0 to 0 of 0 entries

PreviousNext

Go to Page

Completed Learning

Actions

Search

Previous1Next

25

Type	Name	Topic	Number of Content Items	Description	Time Spent	Date Assigned	Session Date	Date Completed	Course/Path Notes	Certificate
Course	Leadership 101	Leadership	2		00H : 32M	02/03/2021		02/03/2021		

Showing 1 to 1 of 1 entries

Previous1Next

Go to Page

For more information about Paycom Learning, see the [Paycom Learning Guide on the Help Menu](#).
For more information about certifications, see the [Certification Management Guide on the Help Menu](#).

Updating Forms

When you are finished making changes to forms click "Update" to ensure your changes are saved.

(Note: Changes will not be applied unless you click "UPDATE.")

Cancel

Update



Now, you'll be taken to a confirmation screen. From here, you can click "Return to Form" to go back and make additional changes, "Employee Menu" to return to that employee's menu or "Select A Different Employee" to go to a different employee's form.

Employee Menu > Form 1 - Demographics, Pay Rates and Taxes

The following employee changes were recorded for ABBY, HANNAH

Description	Old Value	New Value	Change Note (optional)
Minimum Wage Profile		Default State Minimum Wage [DEF]	

Add Notes and Continue

Checklist Assignment

Please be advised that duplicate checklist(s) cannot be assigned to an employee. Checklist(s) the employee does not have at the time may be assigned.

Assign Additional Checklist(s) to this Employee?

Search

Select All

☐ Employee Transfer Notes

☐ FMLA Checklist

☐ Manager Promotion

☐ Year-End Employee Processes

Assign Checklist(s)

Onboarding Checklist Assignment

Assign a Checklist to this Employee?

Benefit Education

Assign Checklist

Return to Form

Employee Menu (ABBY, HANNAH)

Select A Different Employee



Employee Profile

After you have selected the employee in Make Employee Changes, you can click “View Full Profile” to view the profile for that employee.

This profile will show the first six forms within Make Employee Changes in a quick-view format that allows you to review the employee’s information.

Employee Menu	
1 Demographics, Pay Rates and Taxes	11 Direct Deposit
2 Scheduled Earnings and Deductions	12 Year-to-Date Totals
3 Dates and HR	13 Employee Benefits
4 Percentage Labor Distribution	14 Dependents and Beneficiaries
5 3rd Party Payees	15 Documents 3 of 4 requires action
6 Accrual Information	16 Checklists
7 Employee Photo	17 Year-End Tax Forms
8 Custom Fields	20 Compensation and Performance History
9 Employee Self-Service ®	21 Learning
10 Time and Attendance View Timecard	



Employee Self-Service® Preview

If you need to assist your employees, you have the option to view content as they do by using the View ESS as Employee option in Form 9: Employee Self-Service®. This access is read-only; therefore, you won't be able to make changes or edit information, but you will be able to easily provide troubleshooting assistance and guidance to your employees.

To access this feature, you must have "Allow ESS View as Employee" enabled within your Permission Profile, as well as access to view sensitive fields and edit access to all employee forms.

For example, you can walk your employees through viewing their available vacation hours or show them how to submit a time-off request.

This feature is available within most parts of Employee Self-Service® with the exception of Benefits. If you need to walk your employees through enrolling in their benefits, please reference the Benefits Guide on the Help Menu.

Form 9 - Employee Self-Service®

Employee Self-Service® Login Parameters

Employee Self-Service® Login Enabled Enabled

Username 064268971

Password

Reset Security Questions [Reset](#)

Expense Management

Expense Management Class Sales

Allow Employees to Receive Expense Notifications ☐ hannahabby@paycom.com

Fixed and Variable Rate Program Enrollment

Employee is not yet enrolled in program. Enrollments will show here once enrolled from the Participant Setup page.

Employee Self-Service® Access Profile

Profile Active EE

View ESS as Employee [Enter ESS View](#)

(Note: Changes will not be applied unless you click "UPDATE")

[Cancel](#) [Update](#)



Batch Edit

The Batch Edit feature allows you to make the same change to multiple employees at the same time. To begin, check the box in Make Employee Changes next to the employees you want to make a change. Then select "Batch Edit Menu" from the Batch Actions drop-down menu.

Make Employee Changes

Employee Listing

Add Filter...

Found (134) employee matches

Search 3 records selected

Previous 1 2 3 4 5 6 Next

Actions 25

Batch Edit	Employee	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service Login	Quick Links
<input checked="" type="checkbox"/>	AARONS, BRITTANY JANE (A001)	A	7352	200	002	HOU			09125A001	Quick Links
<input checked="" type="checkbox"/>	ABBY, HANNAH (8971)	A	2398	500	002				091258971	Quick Links
<input checked="" type="checkbox"/>	ADAMS, JESSICA (A000)	A	1111	300	001				09125A000	Quick Links

There are several options to batch edit. For each option, select the item(s) you would like changed from the drop-down menu and click "Edit." This directs you to the appropriate screen where you can make the changes to the item.

Make Employee Changes Batch Edit Menu

Batch Edit Menu

Paycode Profile Update

Deduction Edit

Accrual Edit

Earning Edit

Employee Employee Properties Edit

Base Pay Edit

COBRA Eligible Benefits - Deductions & Dates [DEN] Dental Pre-Tax [HEA] Health Pre-Tax [VMS] Vision Pre-Tax Edit

Tax Profiles Assign New Tax Profiles Edit

W2 Additional Info Note: Applies only to current calendar year Edit

Checklisting Profile Assign

Rates by Allocation Department Search or Make Selection Locations Search or Make Selection Jobs Search or Make Selection Edit Remove

Custom Fields Edit Employee Custom Fields Edit

Cancel

Selected Employees (pre-edit status)

Number	Employee
1	ABBY, HANNAH (8971)
2	BAKER, JEFFERSON (5482)
3	BARNES, PATRICK (A000)



Effective Dating

The Effective Dating feature allows you to enter a change now that will take effect at some date in the future for one or multiple employees. Changes can be added for pay rates/salary or deductions. To begin, check the box in Make Employee Changes next to the employees you want to add the same information for an effective date. Then select "Effective Dating" from the Batch Actions drop-down menu.

Batch Edit	Employee	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service ® Login	Quick Links
<input checked="" type="checkbox"/>	AARONS, BRITTANY JANE (A001)	A	7352	200	002	HOU			09125A001	Quick Links
<input checked="" type="checkbox"/>	ABBY, HANNAH (8971)	A	2398	500	002				091258971	Quick Links
<input checked="" type="checkbox"/>	ADAMS, JESSICA (A00Q)	A	1111	300	001				09125A00Q	Quick Links

From this menu, you can either View Effective Dates or Add Effective Dates for the selected employees. To view employees with effective dates, click "View Effective Dates For Selected Employees."

Effective Dating Main Menu

3 employee(s) selected

[View Effective Dates For Selected Employees](#)

[Add Effective Dates For Selected Employees](#)

Viewing effective dates will display effective dates that have not yet passed.

Name	Change Description	Current Value	Future Value	Effective Date	Edit
JEFFERSON BAKER	Deduction Added - [OCA] Car Allowance	0	300.00	11/25/2019	Edit
HANNAH ABBY	Deduction Added - [OCA] Car Allowance	0	300.00	11/25/2019	Edit
PATRICK BARNES	Deduction Added - [OCA] Car Allowance	0	300.00	11/25/2019	Edit



To add an effective date, click “Add Effective Dates For Selected Employees.”

Effective Dating Main Menu

3 employee(s) selected

View Effective Dates For Selected Employees

Add Effective Dates For Selected Employees

You can change pay rates or salary amounts and deduction amounts. Select the type of change then add the new value. Add the date the change will be effective by clicking the “Effective Date” field and selecting the date from the pop-up calendar. The change will take effect on the entered date. Any payroll submitted on the same date or after this date will have the new change reflected on it.

Add Effective Date

Change Type: Deductions

Child Code: Car Allowance

Changed Value: Amount

Value: 300.00

Effective Date: 11/25/2019

*NOTE: Changes will take place for ALL 3 employee(s)

**NOTE: if an employee does not currently have a deduction set up, the deduction will be registered on the effective date

Submit

Add Additional Fields

If you want to view additional information from the Make Employee Changes menu, use the actions drop-down menu and select “Table Configuration.”

Employee Listing

Batch Actions

Add Filter...

Found (134) employee matches

Search

Previous 1 2 3 4 5 6 Next

Batch Edit	Employee	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge	Table Configuration	Service & Login	Quick Links
<input type="checkbox"/>	AARONS, BRITTANY JANE (A001)	A	7352	200	002	HOU			09125A001		Quick Links
<input type="checkbox"/>	ABBY, HANNAH (8971)	A	2398	500	002				091258971		Quick Links

Actions

25



Simply drag and drop the fields you want to include. Any fields that display within the Grid Fields section will display within the menu after you click "Update." You can add the Hire Date, Primary Supervisor, Position Title, Labor Allocation and Pay Type.

Table Configuration

The Selectable Fields section includes all options that can be included on the grid. To include an item on the grid, drag and drop the selection into the Grid Fields section. The arrows above will move all entries in that section to the respective section.

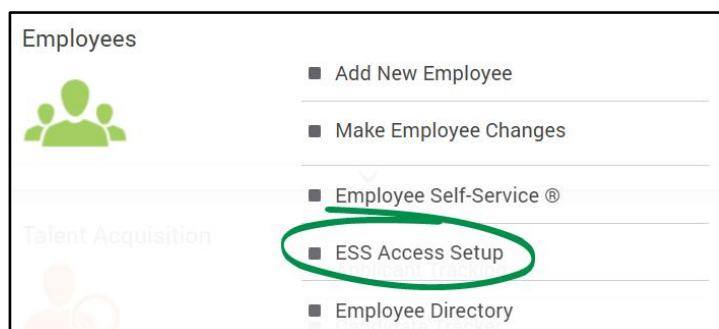
Selectable Fields	Grid Fields
<div>Hire Date</div>	<div>Position Title</div>
<div>Primary Supervisor</div>	
<div>Labor Allocation</div>	
<div>Pay Type</div>	



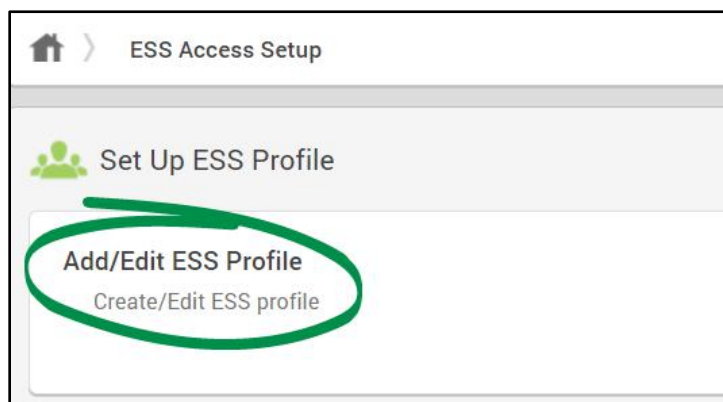
Add Preferred Name to Employee Records

Addressing employees by their preferred name shows respect and inclusion. To support your employees, allow preferred names to be entered in Employee Self-Service®. Once saved, Paycom will continue to use legal names as required, such as on Forms W-2 and I-9. However, preferred names will display throughout Paycom to ensure employees are addressed by the appropriate name.

First, you must grant employees permission to save preferred names in ESS Access Profiles. From the Employees tile, click "ESS Access Setup."



Then, click "Add/Edit ESS Profile."





Click the appropriate profile on the Add/Edit ESS Profile screen.

Profile Code	Profile Description	Default Profile	Created By	Employees Assigned	Delete
ALL	Active EE	X	bhoman	122	
TERM	Terminated Employees		bhoman	18	

Scroll to the Payroll and HR Information section and enable the following permissions:

- **Allowed Preferred Name:** If enabled, employees can save a preferred name within Employee Self-Service®.
- **Print Preferred Name on Pay Stub:** If enabled, employees can elect to have their preferred name display on earning statements and paystubs. *This permission will only display if you enable "Allowed Preferred Name."*

When finished, scroll to the bottom of the screen and click "Update" to save your changes.

☒ Payroll and HR Information

- ☒ Address and Contact Info
- ☒ Allow Work Email Change
- ☒ Test Sample Paycheck
- ☒ Display Job Description
- ☒ Pay Rates
- ☒ Data History
- ☒ Allow Preferred Name
- ☒ Print Preferred Name on Pay Stub
- ☒ Direct Deposit
- ☒ Allow Employees to Edit Main Account

- ☒ Allow Personal Email Change
- ☒ Scheduled Earnings and Deductions
- ☒ Percent Labor Distribution
- ☒ Pay-To-Date™
- ☒ Allow Employees to Edit Distributions



The Preferred Name field will display in Employee Self-Service® in addition to the Nickname field to ensure employees can document both name types. To save a preferred name, employees will navigate to the Address and Contact Information screen of Employee Self-Service® and click “Add Preferred Name.”

Employees will enter their preferred name in the pop-up window and indicate whether the preferred name should display on earning statements and paystubs (if applicable). When finished, employees will click “Add Preferred Name.”

Legal names will continue to display on paychecks, even if the box for “Display Preferred Name on Paystub” is checked.

The screenshot shows the 'Address and Contact Information' screen. Under the 'Employee Information' section, the 'Legal Name' is 'NELSON, SOPHIA FLYNN' and the 'Nickname' is 'SOPH'. The 'ADD PREFERRED NAME' button is circled in green. Other fields include 'Birth Date' (11/12/1978), 'Social Security Number' (***-**-8347), 'Work Email', and 'Personal Email' (sophia@paycomonline.com). The bottom navigation bar includes Home, Refresh, Settings, and Account.

The screenshot shows the 'Add Preferred Name' pop-up window. It includes an information message: 'The Preferred Name will display throughout system instead of legal name.' The 'First Name' field is 'Sophie', 'Middle Name' is empty, 'Last Name' is 'Nelson', and 'Suffix' is empty. The 'Show Preferred Name on Paystub' checkbox is checked. The 'ADD PREFERRED NAME' button is circled in green, and a 'CANCEL' button is also visible. The bottom navigation bar is the same as the previous screen.



Once saved, preferred names will display throughout Paycom as the employee's name. *Legal names will continue to appear on benefits documents, paychecks and Forms W-2, W-4 and I-9.*

As a best practice, employees should enter their preferred name in Employee Self-Service®. However, if necessary, you can save an employee's preferred name within Form 1: Demographics, Pay Rates and Taxes. To do this, navigate to Employees > Make Employee Changes and click the appropriate employee's name.

Batch Edit	Employee Name	Status	SSN	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service® Login	Quick Links
<input type="checkbox"/>	AARONS, BRITTANY JANE(A001)	A	7352	200	001	HOU			09125A001	Quick Links
<input type="checkbox"/>	ABBY, HANNAH(8971)	A	2398	500	001				091258971	Quick Links
<input type="checkbox"/>	ADAMS, JESSICA(A00Q)	A	1111	300	001				09125A00Q	Quick Links
<input type="checkbox"/>	ADAMS, PAULINA(A056)	A	1765	1	002				09125A056	Quick Links

From the Employee Menu, click "Demographics, Pay Rates and Taxes."

Employee Menu		
1	Demographics, Pay Rates and Taxes	11 Direct Deposit
2	Scheduled Earnings and Deductions	12 Year-to-Date Totals
3	Dates and HR	13 Employee Benefits
4	Percentage Labor Distribution	14 Dependents and Beneficiaries
5	3rd Party Payees	15 Documents



Click "Add" next to the Preferred Name field.

Make Employee Changes > Employee Menu > Form 1 - Demographics, Pay Rates and Taxes

ADAMS, JESSICA (A00Q)
ACTIVE W-2
Warehouse (300)...
Hired 02/11/2020
View Full Profile
01 - Demographics, Pay Rates and Taxes

ADAMS, JESSICA (A00Q)
List All
Add New Employee

Form 1 - Demographics, Pay Rates and Taxes
View Change History

Employee Names

Legal Name ADAMS, JESSICA

Nickname JESS

Employee Demographics

Employee Status ACTIVE

On-Leave Start Date 00/00/0000

Social Security Number 111 - 11 - 1111 Applied For

On-Leave End Date 00/00/0000

Then, enter the employee's preferred name in the pop-up window and indicate whether the preferred name should display on earning statements and paystubs. When finished, click "Add."

Once saved, the preferred name will replace the employee's legal name throughout Paycom.

Add Preferred Name

This Preferred Name will display throughout the system instead of legal name.

First Name * James

Middle Name Middle Name

Last Name * Adams

Suffix suffix

Display Preferred Name on Paystub ☒

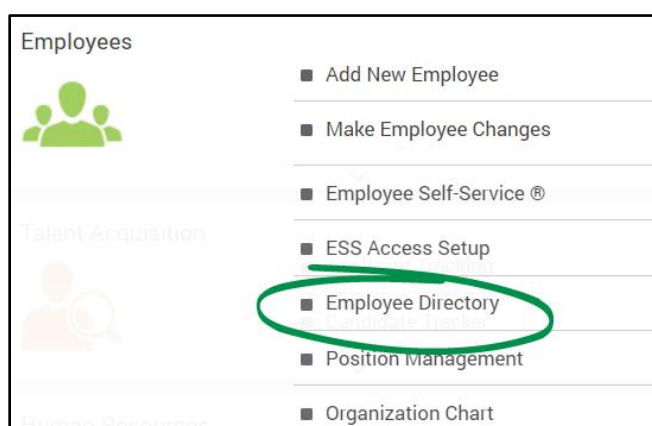
Cancel Add



Employee Directory

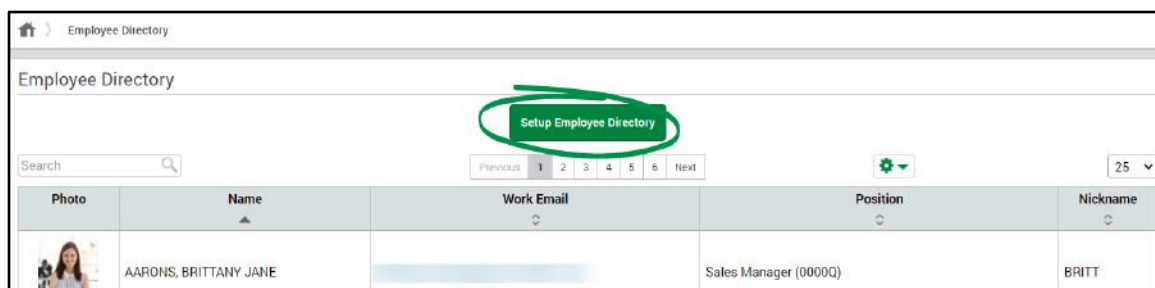
Paycom's customizable Employee Directory is full of details such as contact information, nicknames and birthdays, making it easy for your workforce to learn and connect with each other.

To determine which fields display within the Employee Directory, click "Employee Directory" from the Employees tile.



Then, click "Set Up Employee Directory."

Only users with "View and Setup" selected for the Employee Directory permission in Permission Profiles can set up the Employee Directory.





Users and/or employees can reference the Employee Directory. To enable the Employee Directory for your users, check the box for "Client Side." Then, check the box next to the appropriate fields in the Select Details section to determine which fields are visible to users.

You can also include up to three custom fields in the Employee Directory. In the Custom Fields drop-down menus, each Custom Select and/or Custom Date fields saved in Company Maintenance will be available for selection.

To learn how to create and manage custom fields, please see our [Company Maintenance guide](#) available on the Help Menu.



To enable the Employee Directory in Employee Self-Service®, check the box for “Employee Side” and determine which fields are visible to employees.

When finished, click “Save.”

Employee Directory Setup

☒ Client Side

Select Detail(s)

Search

☐ Select All

☒ Show Photo

☐ Show Username

☒ Show Work Email

☐ Show Personal Email

☐ Show Allocation/Department

☒ Show Position

Show Selected Filters

Custom Field 1

T-Shirt Size

Custom Field 2

Parent

Custom Field 3

Military Branch

☒ Employee Side

Select Detail(s)

Search

☐ Select All

☐ Nickname

☐ Location

☐ Show Address

☐ Show Secondary Phone

☐ Show Primary Supervisor

☐ Apply User Access Group

Show Selected Filters

Custom Field 1

T-Shirt Size

Custom Field 2

Parent

Custom Field 3

Military Branch

Cancel

Save

Back to TOC

Visit the Help Menu for the most up-to-date version of this guide.

Employee Management | 135



The Employee Directory will update to reflect your changes.

Employee Directory

Setup Employee Directory

Search

Previous 1 2 3 4 5 6 Next

25

Photo	Name	Work Email	Position	Nickname	T-Shirt Size	Parent	Military Branch
	AARONS, BRITTANY JANE	brittany.homan@paycomonline.com	Sales Manager (0000Q)	BRITT	M	Yes	
	ABBY, HANNAH	maeghan.savage@paycomonline.com	Staff Accountant (0001G)		S	No	Air Force

To access the Employee Directory in Employee Self-Service®, employees will click "Employee Directory" from the Company Information tile.

The Employee Directory will only display if "View Employee Directory" is enabled in ESS Access Profiles. To learn how to create and update ESS Access Profiles, please see our Paycom Basics guide available on the Help Menu.



From the Employee Directory tab, employees can click the arrow to view an employee's details.

Employee Directory Organizational Chart

Search by Name...

Photo	Name	Work Email	Department	Position
	AARONS, BRITTANY JANE	brittany.homan@paycomonline.com	Sales	Sales Manager (0000Q)

Primary Phone	(520) 370-2894 [Cell]
Location	Corporate [001]
Job	Director [001]
T-Shirt Size	M
Parent	Yes
Military Branch	



Employee Change Import (EMI02)

Paycom supports the import of employee change information using a comma delimited file. Files can be created in programs like Microsoft Excel or Notepad. The import file can be found on the Help Menu under Employee Management Forms.

Creating the Import

The first step is collecting the appropriate data to include in the file. This can be done manually or by pulling a report.

There are four elements that must be included in every Employee Change Report:

	A	B	C	D
1	eeencode	importcode	childcode	newvalue
2				
3				

- **Employee Code (eeencode):** This is a four-character, unique identifier that must correspond to an employee already set up in Paycom.
- **Import Code (importcode):** This code identifies the type of change made to the employee. To find the correct Import Code for your import, refer to the "Employee Change Import (EMI02)" import file on the Help Menu.
- **Child Code (childcode):** This code is mandatory for certain Import Codes and can be left blank when it is not mandatory. To determine whether your import requires a Child Code and what the valid inputs are, refer to the "Employee Change Import (EMI02)" import file on the Help Menu.
- **New Value (newvalue):** This determines what the new value for the field will become.

In the following example, the import is changing the employee's first name. The first name for employee FREM is going to be changed to "Matthew." The Child Code for this import is not required.

	A	B	C	D
1	FREM	FIRSTNAME		Matthew
2				
3				



In some cases, more than one new value will need to be included in the New Value field. This information must be separated by pipes (|). To do this, you can use the concatenate function in Microsoft Excel. Concatenating allows you to link together information in multiple cells into one cell.

When you have multiple fields of data to enter, you first should insert your header row. This will ensure the information goes into the correct fields.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	EECODE	IMPORTCODE	CHILDCODE	NEWVALUE	POLICYNUM	ACTIVEACCR	HIDEACCR	HIDECHECK	ACCRDATE	AWARDDATE	REDEEMDATE	SHOWDATE	CHECKDATE	BEGBALANCE	AWARDED	TAKEN
2																
3																

Insert pipes in the second row between each item starting after column "E." These will be used later to separate the items in the concatenation formula.

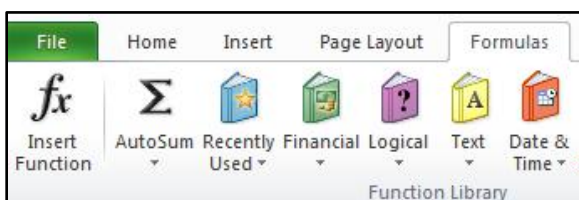
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1	EPCODE	IMPORTCODE	CHILDCODE	NEWVALUE	POLICYNUM	ACTIVEACCR	HIDEACCR	HIDECHECK	ACCRDATE	AWARDDATE	REDEEMDATE	SHOWDATE	CHECKDATE	BEGBALANCE	AWARDED	TAKEN											
2																											
3																											

Next, input the data.

From column "E" onward, only input data in the fields for the information you wish to change. All other fields can be left blank.

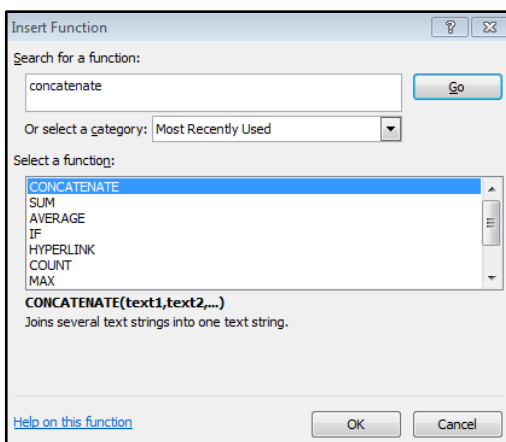
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1	EECODE	IMPORTCODE	CHILDCODE	NEWVALUE	POLICYNUM	ACTIVEACCR	HIDEACCR	HIDECHECK	ACCRDATE	AWARDDATE	REDEEMDATE	SHOWDATE	CHECKDATE	BEGBALANCE	AWARDED	TAKEN											
2	FREM	EEACRLS	VAC																				120				
3																											

In Microsoft Excel, click the "Formulas" tab. Make sure you select the field beneath the New Value header, and then click "Insert Function."

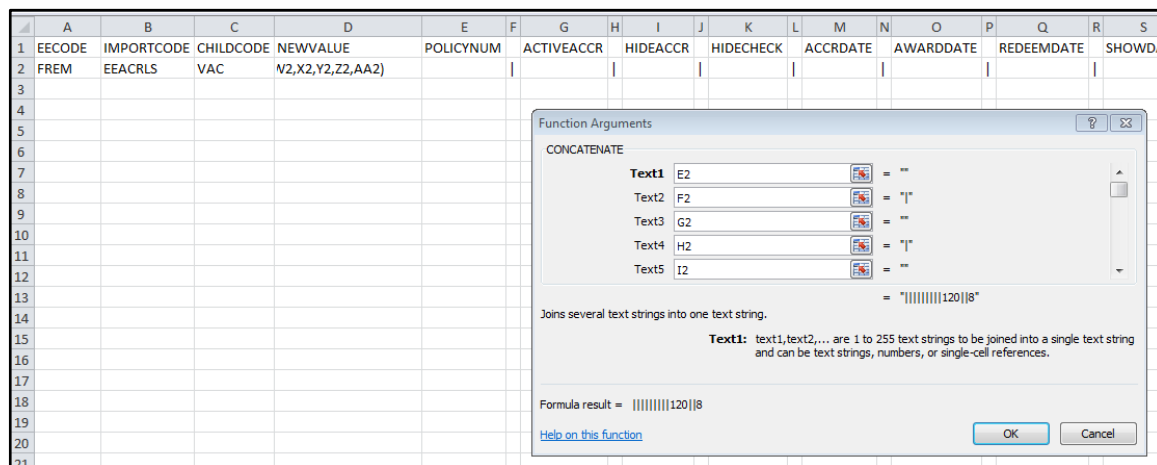




Select the "Concatenate" formula, and click "OK."



Starting in column E, select each field in the second row under the headers, including the pipes, until you reach the field below the last header. This will insert each field into the concatenation formula. Each field should be in a separate text box. When finished, click "OK."



Column D should now appear similar to the column D shown below.

	A	B	C	D
1	EECODE	IMPORTCODE	CHILDCODE	NEWVALUE
2	FREM	EEACRLS	VAC	120 8
3				



Next, delete the header row and all columns from column E on. Once the header row is deleted, you will need to copy.

It is good practice to delete several rows following the last row in your import. This will help ensure the file is error-free.

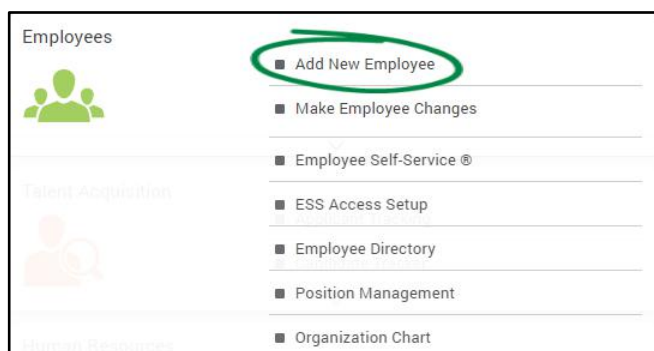
The final import file should look similar to the following:

	A	B	C	D
1	FREM	EEACRLS	VAC	120 8
2				
3				

Save the file as a .CSV file.

Importing the File

From the Employees tile, click "Add New Employee."





Then, click “Import Employee Changes.”

The screenshot shows the 'Add New Employee' page with a sidebar on the left containing 'New Employee Queue', 'New Hire Templates', and 'Employee Master Import'. The main content area has three options: 'Import Employee Changes' (circled in green), 'Import changes to any employee that currently exists in the Paycom system', and 'Tax Code Geolocation Import'.

Click “File” and upload the import file. Then, designate the Unique Employee ID used in the file. It must be one of the following options:

- Employee Code
- Social Security Number
- Clock Sequence Number

When finished, click “Continue.”

For more instructions on how to format your import file, click the link in the blue informational banner or view the [Employee Change Import \(EMI02\)](#) import file on the Help Menu.

The screenshot shows the 'Import (Step 1 of 2)' page. It includes a blue informational banner with instructions. Below, there's a 'Maximum File Size' section indicating 500 KB. A 'Select Import File(.txt,.csv)' section has a 'File...' button. The 'Unique Employee ID' section has three radio buttons: 'Employee Code' (selected and circled in green), 'Social Security Number', and 'Clock Sequence Number'. At the bottom are 'Cancel' and 'Continue' buttons.



Tax Code Geolocation Import

The Tax Code Geolocation Import allows for the upload of home addresses or coordinates to determine the associated tax jurisdiction.

From the Add New Employee screen, click "Tax Code Geolocation Import."

The screenshot shows the 'Add New Employee' interface. On the right side, under 'Employee Master Import', the 'Tax Code Geolocation Import' option is circled in green. It includes the description: 'Import employee addresses to determine state and local tax code assignments.'

Open the import file by clicking "Download" next to Import Template.

The screenshot shows the 'Tax Code Geolocation Import' screen. A blue information box at the top states: 'The Tax Code Geolocation Import allows the upload of home addresses to determine the tax jurisdiction associated to the an employee's home'. Below this, the 'Import Template' section has a 'Download' button circled in green. The 'Maximum File Size' is 5 MB (Approximately 15,000 Employee Records). The 'Choose File' section shows 'Choose File' and 'No file selected' buttons. At the bottom are 'Cancel' and 'Continue' buttons.

Fill in the fields according to the header row using either coordinates or physical addresses.

	A	B	C	D	E	F
1	EEID	Coordinates	Street	City	State	Zip
2	A001	35.612081, -97.648635				
3	A002		123 Main ST	Akron	OH	54624

Save as a Microsoft Excel file and upload. Paycom will return a Microsoft Excel file to you with any local taxes that would apply.

New Hire Reports

New Hire Audit Report

New Hire Missing Fields Report

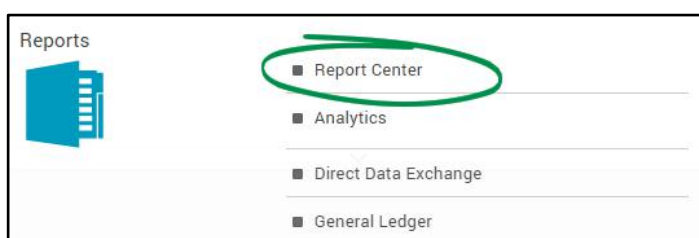
New Hire Profile Report



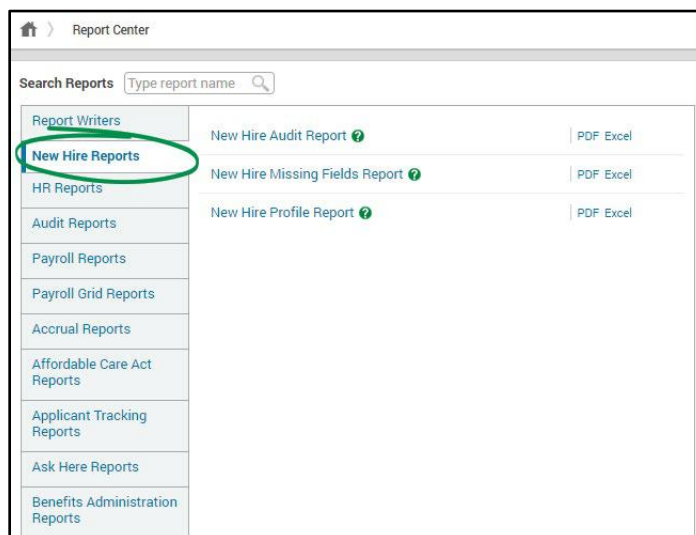
New Hire Reports

Reporting on your new hires can provide valuable insight into your hiring processes. To help you review the information entered in the New Hire Queue, there are three pre-defined New Hire Reports. In this section, we'll review the details of each New Hire Report, so you are aware of the data each report provides.

To access the New Hire Reports click "Report Center" from the Reports tile on the Main Menu.



From the Report Center, you can generate reports for all the modules in which you have access. Click the "New Hire Reports" tab to view all the reports available. To view a description for each report, hover your cursor over the green tool tip.





New Hire Audit Report

The New Hire Audit Report allows you to review all new hire changes that occurred in the New Hire Queue during a specific date range.

PAYCOM UNIVERSITY Client: 05425		New Hire Audit Report						From: 01/01/2020 To: 12/31/2020	
SSN	Name	Step	Field	Old Value	New Value	Change Type	Change Date	Changed By	IP Address
. ()		HR Information	Employee Document Group	ALL	MANAGEMENT	Change	01/19/2020 09:09:59 PM	jalkhalaf	172.19.0.43
. ()		HR Information	Benefits Eligibility Profile		ALL	Add	01/19/2020 09:09:59 PM	jalkhalaf	172.19.0.43
. ()		HR Information	Profile Effective Date		11/30/-0001	Add	01/19/2020 09:09:59 PM	jalkhalaf	172.19.0.43
. ()		HR Information	Pay Class		PC1	Add	01/19/2020 09:09:59 PM	jalkhalaf	172.19.0.43
. ()		HR Information	Terminal Access Group		TG1	Add	01/19/2020 09:09:59 PM	jalkhalaf	172.19.0.43
. ()		HR Information	Earning Profile		DEF	Add	01/19/2020 09:09:59 PM	jalkhalaf	172.19.0.43

New Hire Missing Fields Report

The New Hire Missing Fields Report allows you to review the missing fields for pending new hires in the New Hire Queue. We recommend generating this report before batch hiring to ensure employees are not missing any required fields that would prevent them from turning active.

PAYCOM UNIVERSITY Client: 05425		New Hire Missing Fields Report		
SSN	Name	Step	Missing Field	Required
000-00-0002	Adams, Franklin	Hr Information	Workers Comp Code	Yes
	Jones, Randall	Personal Information	Social Security Number	Yes
	Jones, Randall	Personal Information	Street (Employee Address)	Yes
	Jones, Randall	Personal Information	City (Employee Address)	Yes
	Jones, Randall	Personal Information	Zip (Employee Address)	Yes
	Jones, Randall	Personal Information	Birth Date	Yes
	Jones, Randall	Personal Information	Gender	Yes
	Jones, Randall	Work Information	Hire Date	Yes
	Jones, Randall	Work Information	Position Seat	Yes
	Jones, Randall	Work Information	Labor Allocation Profile	Yes
	Jones, Randall	Work Information	Department	Yes
	Jones, Randall	Work Information	Labor Allocation	Yes
	Jones, Randall	Pay Information	Pay Type	Yes
	Jones, Randall	Pay Information	Pay Basis Check Display	Yes
	Jones, Randall	Paycheck Information	Paycheck Deposit	Yes
	Jones, Randall	Tax Information	Lives in State	Yes
	Jones, Randall	Tax Information	SUI Tax Agency	Yes
	Jones, Randall	Hr Information	ACA Initial Status	Yes
	Jones, Randall	Hr Information	Workers Comp Code	Yes



New Hire Profile Report

The New Hire Profile Report displays information from new employee records in an easy-to-read format. This allows you to keep record of each new hire you've added to Paycom — even those you've deleted from the New Hire Queue.

PAYCOM UNIVERSITY
Client: 05425

New Hire Profile Report

Adams, Franklin	Hire Date	New Hire Templates	Default New Hire
FA	Position	Self-Onboarding	No
	Employee Type	Work Location	
	Home Allocation		

Personal Information

First Name	Franklin	Social Security Number	000-00-0002	Birth Date	02/01/1980
Last Name	Adams	Primary Phone	(405)-123-4567 [Other]	Home Address	123 Main Street, Oklahoma City, Oklahoma, 73122

Taxes

Employee Type	1099
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HR Information

ESS Access Profile	Active EE	Send ESS Login via Email (Personal or Work email)	Personal Email
Checklist(s)	New Hire Checklist	Employee Document Group	Employees- All [ALL]

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