Using the Paychex Mobile App with Paychex Online

The Paychex Mobile app offers clients, employees, and accountants/CPAs an easy-to-use portal for accessing Paychex® Online services (**www.paychexonline.com**) from an Apple® iPhone®, Android™-powered, or BlackBerry® smartphone or similar device.

The Paychex Mobile app gives you read-only, 24/7, wireless Internet access to your payroll and benefits data with the tap of an icon.

First, Get Registered!

Before using the Paychex Mobile app for the first time, complete your **Paychex Online single sign-on (SSO) account registration** using a desktop or laptop computer connected to the Internet.

For assistance in registering or connecting to Paychex Online, please contact your company's administrator.

Get the Paychex Mobile App

The Paychex Mobile app is used to access Paychex Online Payroll®, Employee Access Online, and Benefits Online product information using a smartphone or similar device.

You may download the app for your smartphone or similar device from Apple® iTunes® App Store, Google Play™, or BlackBerry® App World™.

> *i*   **Important!** *The Paychex Mobile app is only available to users with a Paychex Online SSO account who access **www.paychexonline.com** for their online services. Users who access these sites directly cannot use the Paychex Mobile app:*
> - » ***www.mypaychex.com***
> - » ***online.paychex.com***
> - » ***benefits.paychex.com***

> *i*   *You may also begin by accessing the Paychex Mobile support site: **www.paychex.com/print/mobile** Then click the applicable store link to locate the app.*

What Can I Access With the App?

Paychex Online, Online Payroll, and Online Benefits client employer/
administrator and employee users can use the Paychex Mobile app
dashboard for read-only access to their Paychex Online data.

Employee users can access the following personal information:

- **Retirement Information**

  Including retirement accounts, investment balance information
  and performance, future contributions, and loan information

- **Time Off Information**

  Vacation and personal time off balances, and accrual
  information

- **Check Stubs**

  Check information and net pay allocations

- **Flexible Spending Account Information**

  Information about unreimbursed medical/dental and
  dependent care expenses, reimbursements, elections,
 and claims

- **Tax Documents**

  Forms W-2

- **Employee Profile**

  Employee profile information, work details, personal details,
  compensation/pay, earnings, federal taxes, unemployment,
  state taxes, city taxes, and deductions

Paychex Online Security

The app automatically logs you out after being idle for five minutes.
After the app logs out, you must log back in from the Log In screen.
You can log out at any time by tapping **Logout** on the app dashboard.
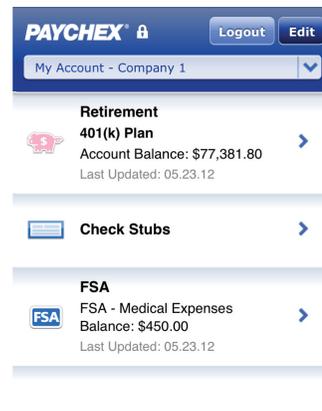
*Although concerns about security
are high, there are things you can
do to protect yourself:*

» *Never leave your smartphone
unattended in public places.*

» *Set your smartphone to lock or
time out. Require a password.*

» *Regularly check for operating
system updates to ensure you
have the latest security
features.*

» *Download apps only from an
approved marketplace.*

Viewing the App Demos

You have access to employer- and employee-version demonstrations of the app. These sample demos enable you to see the app in action, without needing to log in with your Paychex account.

To begin, tap **Tap here to view product demos.** on the Log In screen.
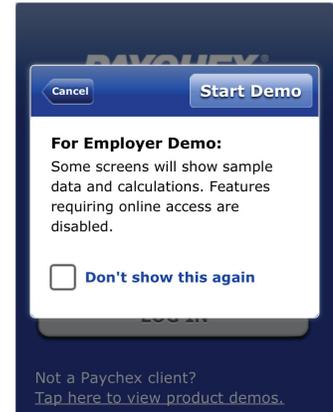
Paychex Mobile and Paychex Online App Differences

- The Paychex Mobile app is read-only and used for checking a limited set of client employee and employer data from the Paychex Online Payroll, Employee Access Online, and Online Benefits products.

- Direct access to the full Paychex Online environment is not available using the Paychex Mobile app, as compared to the Paychex Online app for tablets.

- Data flow and data caching timelines/rules about how information is updated in the Paychex Mobile app may vary compared to using the Paychex Online app for tablets.

i *For the current requirements for using the Paychex Mobile and Paychex Online apps, go to:*

www.paychex.com/resources/requirements.aspx

i *Data flow is the lag time between Paychex' systems and the last date/time value displayed in the app. The lag time depends on the level of 3G/4G and Wi-Fi wireless connectivity, signal strength, and signal availability.*

Navigating in the App

Dashboard

To go to the next level of detail, tap **>** or the **category name**.

Navigation Bar

- To return to the dashboard, tap **Home**.
- To view information, tap a **category**.
- To scroll through the navigation bar options, tap ◀ or ▶.

Other

To move back one screen, tap **Back**.

Customizing the Dashboard

Dashboard items cannot be removed, only hidden or reordered.

- To customize the dashboard, tap **Edit**.
- To display/hide items, slide or tap **On** or **Off**.
- To reorder the display of items, tap ▲ or ▼.

The dashboard is controlled by your user profile; for example, payroll-only users do not see 401(k) and FSA, just Check Stubs and Time Off.

Using Paychex Mobile

VIEWING RETIREMENT ACCOUNT INFORMATION

- To view a list of your retirement accounts and a brief summary of balance and performance information, tap **Retirement** or **>**.
- For more detailed balance information about a specific account, including the investments in your portfolio and how they are performing, tap **>**.
- If you wish to make any changes to your account, tap **Call to Change**, to automatically dial the number.
- For more details about a specific investment, including performance and trading information, tap **>**.
- To return to the Account Details page, tap **Back**.
- To view how your money will be invested the next time a contribution is made, including your employer match (if applicable), tap **Future Contributions**.
- For more details about a specific investment, tap **>**.
- To view each active loan, along with payment and payoff information, tap **Loans**.
- To return to the Account details page, tap **Back**, or to return to the dashboard, tap **Home**.
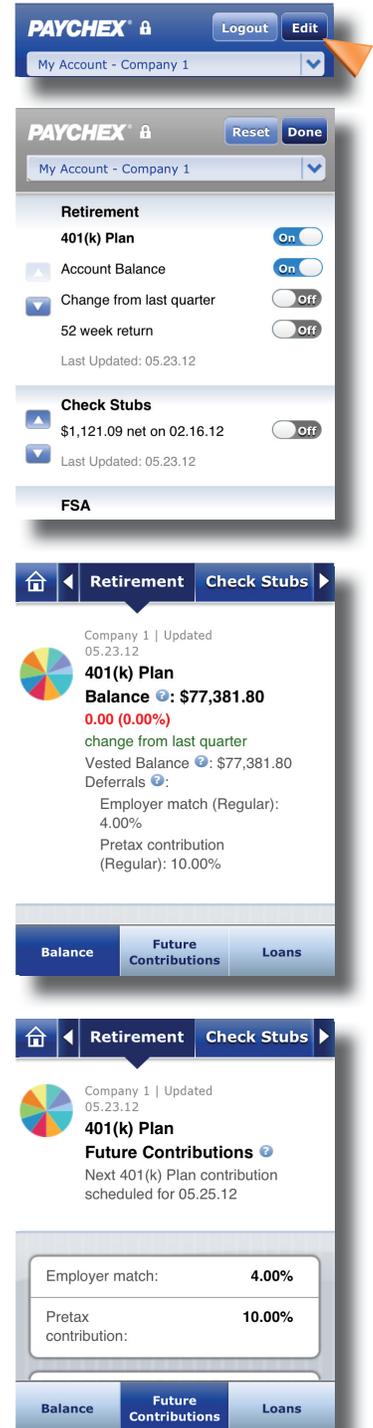
VIEWING TIME OFF INFORMATION

To view your vacation balance, personal time balance, and accrual rates, tap **Time Off** or **>**.

VIEWING CHECK STUB INFORMATION

- To view information about your most recent check including earnings, withholdings, deductions, and direct deposit information, tap **Check Stubs** or **>**.

- To view the actual check stub, tap **View Check Stub**.

- To view information about a previous check, tap the drop-down menu at the top of the display and choose the desired check date.

VIEWING FSA INFORMATION

- To view account balance information for unreimbursed medical and dental and dependent care, tap **FSA** or **>**.

- To view a list of your reimbursements by check date, tap **Reimbursements**.

- Use the drop-down menu to specify the plan or plan year you want to view.

- To view detailed reimbursement information for a specific date, tap a **check date**.

- To return to the FSA Reimbursement view, tap **Back**.

- To view your election information for unreimbursed medical, dental, and dependent care, including elections and employee and employer deductions for each FSA plan, tap **Elections**.

- To view a list of claims by entry date, including check number, status, and total amount submitted, tap **Claims History**.

- For more information about a specific claim date, tap **>**.

🏠 ◀ Retirement	**Check Stubs** ▶

Company 1 | Updated 05.23.12

02.16.12 - 1 ▾

Net Pay:	$1,121.09
Pay Period:	02.05.12 - 02.11.12
Check #:	1394
Total Hours:	40
Total Earnings:	$1,600.00
Total Withholdings:	$310.26

i *Check summary data is only available from 4/1/2012 forward. Check stub PDF files may be viewed for a period of two years before the current date.*

🏠 ◀ **Check Stubs**	**FSA**	**Tax** ▶

Company 1 | Updated 05.23.12
FSA Account Balance

2012: All Plans ▾

UME

Available Balance: $450.00
Annual Election ❓: $450.00
Deductions: $8.65
Total Contribs ❓: $8.65
Claims Paid: $0.00

Account Balance	Reimbursements	Elections	Claims History

VIEWING TAX DOCUMENTS

To view your Forms W-2, tap **Tax Documents**.

VIEWING PROFILE INFORMATION

- To view personal information, work location, work details, and personal details, tap **My Profile**. This view is scrollable.

- To view detailed pay and compensation information, including Other Earnings and Compensation, tap **Comp/Pay**.

- To view your federal and state tax information, along with state unemployment information, tap **Taxes**.

- To view all deductions currently coming out of your pay, tap **Deductions**.

Do You Need Assistance?

For assistance with accessing and using Paychex Online with the Paychex Mobile app, please contact your company administrator.

Paychex Mobile support site: **www.paychex.com/print/mobile**

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