Using the Paychex Mobile App

The Paychex Mobile app offers clients, employees, and accountants/CPAs an easy way to access their Paychex® Online services (www.paychexonline.com) from an Apple® iPhone®, Apple iPod touch®, or Android™-powered smartphone.

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, you must complete your Paychex Online single sign-on 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.

You may also access the Paychex Mobile support site for more information about using the Paychex Mobile app.

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 Paychex Mobile app for your smartphone or similar device from the Apple® App Store℠ or Google® Play™.

Important! The Paychex Mobile app is only available to users with a Paychex Online single sign-on 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

Tap the applicable store link on the Paychex Mobile Support site www.paychex.com/print/mobile to locate the app you need.
What Can I Access With the App?

The Paychex Mobile app provides dashboard access to your Paychex Online data. Employee users can access the following personal information:

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

- **Time Off**
  Vacation and personal time off balances, and accrual information

- **Check Stubs**
  Check information and net pay allocations

- **Health & Benefits**
  Benefits information, including coverage elections and types, eligibility date and status, premium amounts, member guide, and links to carrier information.

- **FSA**
  Information about unreimbursed medical/dental and dependent care expenses, reimbursements, elections, and claims history and debit cards

- **Tax Documents**
  Forms W-2

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

App Security

The Paychex Mobile app 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 may log out at any time by tapping **Log out** on the side navigation panel.

Paychex apps and procedures employ strict security standards. You can also protect your data by:

» **never leaving your smartphone unattended in public places.**

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

» **regularly checking for operating system updates to ensure you have the latest security features.**

» **downloading apps only from an approved marketplace.**

Available features on the dashboard are determined by your company profile. For example, if your company has not subscribed to a retirement plan, **Retirement** will not display.
Viewing the App Demos

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

To begin, tap View Demo at the bottom of the Log In screen, then tap Start Demo.

To switch from the employer demo to the employee demo, tap the Company - Company 1 drop-down menu in the dashboard header, then tap My Account - Company 1.

Smartphone and Tablet App Differences

- The Paychex Mobile app is designed for smartphone-sized displays and short-duration tasks, providing you with the Paychex Online (paychexonline.com) data and functionality that is most vital for on-the-go usage.
- The Paychex Online tablet app provides you with remote desktop access to more in-depth Paychex Online (paychexonline.com) data and functionality.

Navigating in the App

SIDE NAVIGATION

- To display the side navigation panel, tap (Menu). The side panel is the easiest way to access the dashboard items.
- To select a dashboard item, tap its name.
- To scroll the side panel, swipe up or down the screen.
DASHBOARD NAVIGATION

- To go to the next level of detail, tap ➤ next to a dashboard item.
- To scroll the dashboard, swipe up or down the screen.

SWIPEABLE NAVIGATION TABS
To select a top navigation tab, tap the displayed topic name. You may need to swipe left or right to access all topics.

OTHER
To move back one screen, tap ◀.

Customizing the Dashboard

To customize how the Paychex Mobile app displays your data, section items may be hidden.

- To customize the dashboard, tap Edit.
- To display/hide items, slide or tap ☑ (On) or ☒ (Off).
- Tap Save.

The dashboard is controlled by your company profile and subscribed products. For example, payroll-only users do not see Retirement and FSA, just Check Stubs and Time Off.
Accessing Dashboard Items

RETIREMENT

- To view a list of your retirement accounts and a brief summary of balance and vested balance, tap (Menu) and then tap Retirement from the side panel, or tap in the Retirement item on the dashboard.
- If you wish to make any changes to your account, swipe up and tap Call to Change to automatically dial the number.
- For more details about an investment, including performance and trading information, tap .
- To return to the Balance page, tap .
- To view how your money will be invested the next time a contribution is made, including your employer match (if applicable), tap the Future Contributions swipeable navigation tab.
- To view each active loan, along with payment and payoff information, tap the Loans navigation tab.
- To return to the dashboard, tap Home from the side panel or tap .

TIME OFF

To view your vacation balance, personal time balance, and accrual rates, tap Time Off from the side panel or tap in the Time Off item on the dashboard.
CHECK STUBS

• To view information about your most recent check, including earnings, withholdings, deductions, and check number or direct deposit information, tap Check Stubs from the side menu or tap ⓘ in the Check Stubs item on the dashboard.
• To view the printable check stub in Adobe® Acrobat® PDF format, tap View Check Stub. To return to the Check Stubs item, close the check stub window.
• To view information about a previous check, swipe down and tap the drop-down menu at the top of the screen and tap the desired check date.

HEALTH & BENEFITS

• To view your health and benefits information, including plan types, current elections, future enrollments, healthcare and insurance issue assistance, and carrier information, tap Health & Benefits from the side menu or tap ⓘ in the Health & Benefits item on the dashboard.
• To view your coverage type, effective date, and per-pay-period premium, tap ⓘ.
• When viewing a plan type, you have access to one-tap links to the carrier’s website and your member’s guide. You may need to swipe up to show the “For More Information” section.
• Tap ⓘ to open the carrier website with your browser app.

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.

For Android-powered smartphones, a PDF file viewer app is required.
FSA

- To view account balance information for dental and dependent care, and unreimbursed medical, tap FSA from the side menu or tap › in the FSA item on the dashboard.

- To view a list of your reimbursements by check date, tap the Reimbursements navigation tab.
- Use the drop-down menu to select the plan or plan year you want to view.
- To view detailed reimbursement information, tap the check number.
- To return to the FSA Reimbursement view, tap ◀.

- To view your election information for medical, dental, and dependent care, including elections and employee and employer deductions for each FSA plan, tap the Elections navigation tab.
- To view a list of claims by entry date, including check number, status, and total amount submitted, swipe left and tap the Claims History navigation tab.
- For more information about a claim date, tap the claim Entry Date.
- To view a list of FSA debit card account holders and the respective card status, swipe left and tap the Debit Cards navigation tab.
**PAYCHEX MOBILE SUPPORT SITE**

www.paychex.com/print/mobile

**FEEDBACK**

To provide Paychex with feedback about your experience with the Paychex Mobile app, tap **Feedback** from the side panel or tap ➔ in the Feedback item on the dashboard.