MyPaychex.com Training
A Single Sign-On Solution
Table of Contents

WHAT IS MYPAYCHEX.COM? ..................................................... 3

GETTING STARTED .............................................................. 4

REGISTERING YOUR ACCOUNT .............................................. 6
  Registration - 1 Security Check ........................................ 6
  Registration - 2 Add Services or Accounts ......................... 7
  Registration - 3 Personal Information ............................. 13
  Registration - 4 MyPaychex Login Information .................. 14
  Registration - 5 Create Your MyPaychex Account ............. 16

BOOKMARKING MYPAYCHEX ................................................. 19

CLIENT ADMINISTRATOR AND SUPERVISOR REGISTRATION .... 20
  Setting Your PIN ............................................................ 20

ADDING A NEW USER ........................................................... 21

MYPAYCHEX ACCOUNT SUPPORT ......................................... 22

MANAGING YOUR ACCOUNT ................................................ 23
  Retrieving a Username .................................................. 23
  Resetting a Password .................................................... 24
  Changing Your PIN ....................................................... 26
  Resetting Your PIN ....................................................... 26
  Renaming an Account .................................................... 28
  Logging Out ................................................................. 30
  For More Information .................................................... 30
What is MyPaychex.com?

MyPaychex.com is a single-point-of-entry Web portal where clients, their employees, accountants, financial advisors, and brokers can access their Paychex Web-based services with a single username and password.

The website provides access to the following services:

- Preview® Payroll hosted by Citrix®
- Human Resources Online
  - Employee Access Online
  - Paychex Online W-2 Service
- Time and Labor Online
- Benefits Online
  - Retirement Services (employees)
  - Flexible Spending Account
  - Health & Benefits
- Paychex Online Services
  - Paychex Online Payroll®
  - General Ledger Reporting Service
  - Online Reports
  - BeneTrac Online

There are two access levels:

- Full Access allows users to register for MyPaychex and have access to all products from a single point of entry.
- Admin Only Access allows HR Online and Time and Labor Online administrators and supervisors to register for MyPaychex. Those with employee access only for a specific product are not directed to register and should access the product directly from the product site.

Using MyPaychex.com will not alter any existing processes, such as Data Sync or the Time and Labor Online Import/Export process.

All Preview Payroll users are considered Admin users and have a grace period of 90 days to register or 10 logins (one per day).

Only client administrators can register on MyPaychex.com, if the client is set up for Admin Only Access.
Getting Started


Click Register (1) to set up your MyPaychex account or click How Do I Register? (2) to see the step-by-step registration process in action.

After registering, you only need to log in to MyPaychex once to access all your Paychex services. If you want to access the hosted version of Preview Payroll, refer to the “Register Preview Payroll for MyPaychex” section of the MyPaychex Procedures document for more information.
If you are a current user of Paychex services, a screen similar to the following may display before you register. Click Register (1) to set up your MyPaychex account or How Do I Register? (2) to see the step-by-step registration process in action.

If you do not have time to register immediately, select a deferral option (3), then click Proceed to ... to continue to your Paychex service.

Full Access and Preview Payroll users may defer registration for up to 90 days or 10 logins (one per day) by clicking Register Later. This will take you directly to the service.

Admin Only Access users in HR Online or Time and Labor Online can defer registration for 30, 60, or 90 days. They can also opt out and never be asked again.

If you decide to register immediately and click Register (1), you will complete the five important steps described in the next section.
Registering Your Account

Follow this registration process to register an account for MyPaychex.com. Each step ensures that your personal information is secure. Be sure all information you provide is accurate before you continue to the next step.

Registration - 1 Security Check

The registration security check prevents automated systems from accessing the registration process on MyPaychex.com.

Enter the six characters that display and click OK. The field is not case sensitive. If you enter the characters incorrectly, the image will reset and you can try again. If you are unable to read the characters, click the Try Another? (1) icon.

Refer to the “Register Preview Payroll for MyPaychex” section of the MyPaychex Procedures document for more information.

If you are a current user who is redirected to MyPaychex from a specific Web service, some information may be automatically populated in the registration screens.
Registration - 2 Add Services or Accounts

To add services or accounts to your MyPaychex portal, select a service from the drop-down menu. (1)

You can only add one service at a time.

Each Paychex service may require different registration information. If you are a current Paychex service user, some access information for your service may already be verified.

If you are a new user to any Paychex service, except for participant access to the Flexible Spending Account and the Retirements Services Web sites, you must contact your benefits administrator for temporary login information to access the service for the first time.

If you have multiple services that you are adding, you must repeat this step for each service, using your personal login information.

If you have been provided the URL of the application and were deferred to the MyPaychex website, the application has been added for you.

New Benefits Online users do not need a username and password to add the service to MyPaychex.

Your account will not be created until you click the “Create Your MyPaychex Account” button at the end of the registration process.
BENEFITS ONLINE

If you have already received your Benefits Online login information, select Yes (1) and enter your Benefits Online username and password in the fields provided and click Verify Account.

If you have not received your Benefits Online login information, select No (2) and enter your social security number and ZIP Code in the fields provided; then complete sections 3 and 4 before clicking Verify Account.

A confirmation message will display when the service has been verified.
PAYCHEX ONLINE

If you have already received your Paychex Online login information, select Yes (1) and enter your Paychex Online username and password in the fields provided and click Verify Account.

If you have not received your Paychex Online login information, select No (2) and enter your social security number and ZIP Code in the fields provided; then complete sections 3 and 4 before clicking Verify Account.

A confirmation message will display when the service has been verified.

Paychex Online includes administrator Access to Online Payroll, Online Reports, General Ledger Reporting Service, Retirement Services, Paychex HR Solutions ASO and PEO forms online, and Health and Benefits.

This option does not apply if you are a new user for Online Payroll, Online Reports, or GL Reporting. You must obtain login information from Paychex for these services.
PREVIEW PAYROLL HOSTED BY CITRIX

To add the hosted version of Preview Payroll, enter your username and password. Then click Verify Account. (1)

If you are a new Preview Payroll user, you must go to the Preview Payroll service first to obtain login information. Use the URL provided to you by your system administrator or by Paychex. Using the URL adds Preview Payroll to your MyPaychex account.

A confirmation message will display when the service has been verified.

HUMAN RESOURCES ONLINE

When you add Human Resources Online, you need to enter your company ID (client ID), username, and password. Once you have entered your login information, click Verify Account. (2)

If you use Preview Payroll, you are required to change your temporary password when you add the service to your MyPaychex account.

Human Resources Online includes Employee Access Online and Online W-2 Service.

A confirmation message will display when the service has been verified.
TIME AND LABOR ONLINE

To add Time and Labor Online to MyPaychex, you need to enter your client ID before entering your username and password. Once you have entered your login information, click Verify Account. (1)

A confirmation message will display when the service has been verified.

BENETRAC ONLINE

Enter your employer ID, username, and password to add BeneTrac Online to MyPaychex. Once you have entered your login information, click Verify Account. (2)

A confirmation message will display when the service has been verified.
MANAGING YOUR SERVICE

You may select another service from the Service drop-down menu, click **Change Name (1)** to update the account name, or click **Remove** to remove the service from your MyPaychex account.

Your account will not be created until you click the "Create Your MyPaychex Account" button at the end of the registration process.
Registration - 3 Personal Information

Complete all fields in the Personal Information section.

Enter your own email address (1), which may only be used on one MyPaychex account and must be accessible from wherever you use your services. The email address is used to send you your username or reset your password or PIN if you forget them.

The Date of Birth field is used to verify your identity if you need to access your login information or change your password.
Registration - 4 MyPaychex Login Information

In this section, enter a unique username and a password, which you will use to access all your Paychex services through MyPaychex.com.

Your **username** must be 8 to 50 characters long with no spaces, and may include certain special characters ( . [period] @ [at symbol] - [hyphen] _ [underscore] ).

Your **password** must be 8 to 32 characters long, and must include at least three of the following:

- one uppercase letter
- one lowercase letter
- one number
- one special character

Passwords may include these special characters: . [period] @ [at symbol] – [hyphen] _ [underscore] ! [exclamation point] # [number sign] $ [dollar sign] : [colon] ~ [tilde].

**Challenge Questions 1 and 2** are used as a security measures in case you need to reset your password. The answers are specific to you, such as "What city were you born in?" or "What was the color of your first car?"
Next, click **Security Image (1)** to display a list of images. Select an image you will recall when logging in to MyPaychex.

![Security Image](image)

The security image provides an extra layer of security. When logging in, if the correct security image displays, enter your password.

If you do not receive the correct image, first verify your username. If the username is entered incorrectly, a random security image displays.

If your username was entered correctly and you still do not see the correct image, do not continue. Contact Paychex immediately to report a possible phishing attempt.

---

**Phishing** is the act of acquiring personal, private information using various software tools.
Registration - 5 Create Your MyPaychex Account

Review the account information that displays before you create your MyPaychex account. If you discover an error, click the item and edit it. If everything is OK, click **Create Your MyPaychex Account**.

A verification email is sent to the address you entered during the registration process.

Click the link (1) in the email to verify your email address. If you cannot click the link, copy and paste the URL into your Internet browser to confirm the address.

You have 24 hours to verify your email address to avoid limiting your access to important self-help features.
The EMail Address Verification screen displays. Click **Go to My Services (1)** to continue.

After you successfully register for MyPaychex, the My Services screen displays. The yellow congratulatory message (2) only displays on your first login after you successfully create your MyPaychex account. Subsequent logins will display a welcome statement using your name.

CANCELING MYPAYCHEX REGISTRATION

If you click **Cancel Registration** from the Create Your MyPaychex Account screen, this selection screen displays.

Select one of the following options to continue:

- If you do not want to register at this time, click the first option to redisplay the service login screen.
- If you are already registered and would like to add the service, click the second option to continue.
- If you do not want to cancel the registration process, click the third option.
Bookmarking MyPaychex

You can click **Bookmark MyPaychex (1)** after completing the registration process to add the website to your Internet browser's favorites.
Client Administrator and Supervisor Registration

If you have administrative rights to a Paychex service as a supervisor or client administrator, you must complete an additional step when registering.

MyPaychex uses a personal identification number (PIN) as an extra layer of security for the service accounts on which you have administrative rights. This PIN is different from any PIN you previously used to log in to your service.

Setting Your PIN

To assign a PIN to a Paychex service, you are presented with the Create Security PIN window during the registration process.

Whenever you access a service for which you are an administrator, a window displays requesting your PIN.
Adding a New User

You must set up new user accounts on the Paychex services your users need to access before they register on MyPaychex.

To add a new user to a service, follow these basic steps:

1. Log in to MyPaychex.
2. Select the service.
3. Create the user account.
4. Choose access rights.
5. Assign a temporary password, if applicable.

If the employee is accessing MyPaychex for the first time, be sure he has:

- the URL to the MyPaychex Web site (www.mypaychex.com)
- his login information for each service, and
- the instructions for setting up a MyPaychex account (located in the MyPaychex Tools section of the Welcome to MyPaychex login screen).

If the employee has already registered his account on MyPaychex and is adding a service, provide him with his login information for the service. He must then log in to MyPaychex and follow the steps for adding a service to his account.

All new users of the hosted version of Preview Payroll must log in to https://previewhostingservice.paychex.com first to change their password.
MyPaychex Account Support

You can edit your MyPaychex account from the service launch screen. The MyPaychex Tools links let you edit your profile information, log off, access support information, and get information about using MyPaychex.

- **Editing Your Profile** - Change your personal information or MyPaychex account.
- **Log Off** - Exit MyPaychex and return to the login page. You will automatically be logged off after 120 minutes of inactivity.
- **Support** - Display information about Paychex Web-based application support. The support team you contact depends on the application with which you need assistance.
- **How to Use MyPaychex** - View helpful training documents.
- **Minimum Requirements** - View the requirements for using MyPaychex.com.
Managing Your Account

To retrieve your username or reset your password, go to the Welcome to MyPaychex login screen.

Retrieving a Username

If you have forgotten your username, click **Forgot Username** (1).

The Get Username screen displays. In the E-Mail Address field (2), enter the email address you used when you registered for MyPaychex.

If you did not validate your email address at registration, this screen displays the support number to call.
If you registered your email address, your username information will be sent to you there.

From: Client Service
Sent: Friday, November 08, 2013 8:28 AM
To: User
Subject: MyPaychex.com Support

You have successfully verified your identity and requested a reminder for your MyPaychex.com username.

Your MyPaychex user name is sampleuser. Please use this to log in to your MyPaychex account.

If you did not request this reminder, please contact the appropriate Paychex Representative.

For Paychex Online or Preview Payroll, contact your local Paychex, Inc. representative between the hours of 8 a.m. and 5 p.m.

For Retirement Services, Benefits Online, Human Resources Online, Benefrac or Time and Labor Online, contact the Service Center at Paychex at 1-877-281-0624 between the hours of 8 a.m. and 8 p.m. Eastern time.

Thank you,
Paychex, Inc.

Resetting a Password

If you need to reset your password, enter your username in the login screen and click Continue.

When the following screen displays verify your security image, and then click Forgot Password (1) under the Password field.

Be sure your username displays at the top of the Welcome to MyPaychex login screen. If you enter an incorrect username, a random security image displays. Click Cancel and enter the correct username.

If the security image is incorrect, click Click here and a security alert will display with additional instructions.
The MyPaychex Password Reset screen displays. Enter the six characters displayed and click Next.

Enter your date of birth, and the answers to both Challenge Questions.

After you enter the correct information, you can change your password. Click Reset Password (1) and MyPaychex displays the successful change message with a link to your services.
Changing Your PIN

If you have a PIN and administrative rights to a Paychex service, you can change your PIN by clicking **Edit Your Profile Information** in the MyPaychex Tools section.

Resetting Your PIN

Whenever you access a service to which you have administrator access, a window displays requesting your PIN. If you forget your PIN, click **Forgot your PIN?** to reset it.

An email is sent to your registered email address. Follow the instructions in the email to reset your PIN; then enter your password and click **Login**.

Enter your personal information to verify your account.
Enter your new PIN twice to confirm it.

Click **Go to My Services** to access your Paychex services.
Renaming an Account

When you have a service with multiple accounts, you have the option to rename accounts for easier identification.

To rename an account:

2. Click **Rename** (1) below the appropriate account name.
3. Rename the account. (2)
4. Click OK. (1)

5. The account is renamed. (2)
Logging Out

Click **Log Off** in the upper-right corner of MyPaychex to exit. (1)

For More Information

For additional information, click **How to Use MyPaychex** from the Welcome To MyPaychex login screen, then click **MyPaychex Procedures**.