

MyPaychex One-Source Solutions Procedures



PAYCHEX

M Y P A Y C H E X

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Table of Contents

Introduction	1
Register for MyPaychex	1
Register Preview Payroll for MyPaychex	12
Add Accounts or Services	18
Change an Account Name	24
Adding a New User – Administrator/Supervisor Use Only	25
Access Paychex One-Source Solutions	26
Home	28
Additional Services	28
Manage User Accounts	29
Add Accounts or Services	29

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Introduction

The MyPaychex web site is a single point of entry to Paychex One-Source Solutions where all Paychex web-based services can be accessed using a single username and password. In Paychex One-Source Solutions, switching between applications is a simple, seamless task.

Two access levels exist for the client, Full Access and Admin Only Access.

Full Access – Allows all users of a company to register for MyPaychex and access all products from a single point of entry.

Admin Only Access – Allows HR Online and Time and Labor Online administrative or supervisor users to register for MyPaychex. Users with employee access only for a specific product are not directed to register and should access the product directly from the product site.

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

Register for MyPaychex

Note: For additional information on how to register, refer to **How Do I Register?**.

To register for a MyPaychex account, you must have login information for the service that you want to access. This information links your service to your MyPaychex account. Access the URL provided to you by your system administrator or by Paychex.

Note: If the service you want to access is Preview Payroll®, refer to the Preview Payroll procedures later in this document.

From the MyPaychex Login Screen
www.mypaychex.com

If the URL provided is MyPaychex.com, click **Register** and follow the steps below.

From the Application Login Screen

If the URL provided is directly to one of our services, type your username and password. A screen displays that introduces the single point of entry to MyPaychex. Click **Register** to register for a new MyPaychex account.

Note: Full access and Preview Payroll users may defer registration for up to 10 times (once per day) or 90 days by clicking **Register Later**. This takes you directly to the service. To register, complete the steps below.

Admin Only access users in HR Online or Time and Labor Online have the option to defer registration for 30, 60, or 90 days, or the option to opt out and never be asked again.

1. Click **Register**.
2. In the Step 1 - Security Check section, type the six characters that display, then click **OK**.

3. In the Step 2 - Add Services or Accounts section, select the services/accounts you have access to. If you have multiple services that you are adding, this step must be repeated for each service using the specific login information provided to you.

Note: If you have been provided the URL of the application and were deferred to the MyPaychex website, the application has been added for you. You can skip to the next step.

The account name that displays is the default username that was given to you. You may change the name to an identifier of your choice at any time.



- A. If you have a Time and Labor Online (TLO) account (a time and attendance reporting system), complete the following:

- a. Select **Time and Labor Online** from the drop-down menu.
- b. In the **Client ID** field, type the client ID number.
- c. In the **Time and Labor User Name** field, type your Time and Labor Online (TLO) username.
- d. In the **Time and Labor Password** field, type your TLO password.
- e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- f. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.



B. If you have a BeneTrac account, complete the following:

Note: In Paychex One-Source Solutions, select the **Benefits** tab.

- a. Select **BeneTrac** from the drop-down menu.
- b. In the **Employer ID** field, type the employer ID number.
- c. In the **BeneTrac User Name** field, type your BeneTrac username.
- d. In the **BeneTrac Password** field, type your BeneTrac password.
- e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- f. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.



C. If you have a Human Resources Online account (including Employee Access Online and W2 Online), complete the following:

- a. Select **Human Resources Online** from the drop-down menu.
- b. In the **Branch ID** field, type your branch ID.
- c. In the **Client ID** field, type your client ID.
- d. In the **Human Resources Online User Name** field, type your Human Resources Online username.
- e. In the **Human Resources Online Password** field, type your Human Resources Online password.
- f. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- g. If you have completed adding accounts, complete sections 3 and 4 to continue.



D. If you have a Paychex Online account (administrator/supervisor) access to Online Payroll, Online Reports, GL Reporting Service, Retirement Services, Premier/PBS Forms, Health and Benefits), complete the following:

Note: In Paychex One-Source Solutions, click **Online.paychex.com** in the Additional Services section.

- If you have a username and password, complete the following:
 - a. Select **Paychex Online** from the * **Service:** drop-down menu.
 - b. Click the **Yes** radio button to **Do you have Username and Password information?**
 - c. In the **Paychex Online Username** field, type your Paychex Online username.
 - d. In the **Paychex Online Password** field, type your Paychex Online password.
 - e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account Name:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- g. If you have completed adding accounts, complete sections 3 and 4 to continue.

- If you do not have a username and password, complete the following:

Note: 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.

- a. Select **Paychex Online** from the * **Service:** drop-down menu.
- b. Click the **No** radio button next to **Do you have Username and Password information?**
- c. In the **Registration Code** field, type your registration code.
- d. In the **Federal ID** field, type your federal ID.
- e. In the **Phone Number** field, type your phone number.
- f. Complete sections 3 and 4.
- g. Return to section 2, then click **Verify Account**.
- h. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.



E. If you have a Benefits Online account (participant access to Retirement Services, Flexible Spending Account, COBRA, Health and Benefits), complete the following:

Note: In Paychex One-Source Solutions, click **Benefits.paychex.com** in the Additional Services section.

- If you have a username and password, complete the following:
 - a. Select **Benefits Online** from the * **Service:** drop-down menu.
 - b. Click the **Yes** radio button to **Do you have Username and Password information?**
 - c. In the **Benefits Online Username** field, type your Benefits Online username.
 - d. In the **Benefits Online Password** field, type your Benefits Online password.
 - e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- g. If you have completed adding accounts, complete sections 3 and 4 to continue.

- If you do not have a username and password, complete the following:
 - a. Select **Benefits Online** from the * **Service:** drop-down menu.
 - b. Click the **No** radio button next to **Do you have Username and Password information?**
 - c. Enter your social security number in the * **Social Security Number:** fields.
 - d. Type your zip code in the * **Zip Code:** field.
 - e. Complete sections 3 and 4.
 - f. Return to section 2, then click **Verify Account**.
 - g. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.

4. In the Step 3 - Personal Information section, complete the required fields.

- Important:**
- Your **Date of Birth** is a required user-defined security key that is needed in the future while performing certain MyPaychex account self help functions.
 - Your **E-mail Address** is required and used to communicate important login information; it should be accessible from wherever you typically use the services you access and must be unique for each MyPaychex user account.

5. In the Step 4 - MyPaychex Login Information section, complete the required fields.

- Important:**
- Your username must be between 8 – 50 characters. Do **not** use spaces. If the username that you want is not available, try adding a word or number to make it unique.
 - Your password must be between eight (8) and 32 characters, and must include at least three (3) of following:
 - one uppercase letter
 - one lowercase letter
 - one number
 - one special character (. [period] @ [at symbol] – [hyphen] _ [underscore] ! [exclamation point] # [number sign] \$ [dollar sign] : [colon] ~ [tilde])
 - You must select a security image that is easy to remember and will be familiar when logging into MyPaychex.

- Notes:**
- Record your username, password, and the answers to your challenge questions for reference. Ensure they are stored in a secure location.
 - Previously established security keys like image and challenge questions won't carry over from other Paychex services.

6. In the Step 5 - Create Your MyPaychex Account section, complete the following:

- a. Click **Create Your MyPaychex Account**.
- b. If you completed the registration process but want to cancel, click **Cancel Registration**.

7. If you use bookmarks to access your services, click **Bookmark MyPaychex**.

- Exception:** To set up a bookmark in Firefox, go to the screen you want to bookmark and click **Ctrl + D** or **Bookmark This Page** under the Bookmark menu.

8. An e-mail is sent for validation. In order to use self help in the future, validate your e-mail address within 24 hours.

For Internet Explorer

To minimize security warnings from displaying during log in, add **http://landing.paychex.com**, **https://landing.paychex.com**, and **http://www.eenroller.net** to your trusted sites. If you have more than one Paychex site, it is recommended that you add **https://*.paychex.com** to your trusted sites. If you are using Preview Payroll, it is mandatory that you add **https://*.paychex.com** to your trusted sites.

- a. Select **Tools | Internet Options**.
- b. Select the **Security** tab.
- c. On the Security tab, select **Trusted Sites | Sites**.
- d. In the **Add this web site to the zone** field, type the following MyPaychex addresses, **http://landing.paychex.com**, **https://landing.paychex.com**, and **http://www.eenroller.net**.
- e. Click **Add**.
- f. Uncheck the **Require Server Verification (https:)** checkbox for all sites in this zone.
- g. Click **Close**.
- h. Click **OK**.

Notes:

- This procedure may be slightly different depending on the web browser.
- If you choose not to make this a trusted site, you will need to react to any secure site warnings that display.

Internet Explorer browser settings must be set to allow cookies for Paychex sites.

- a. Select **Tools | Internet Options**.
- b. Select the **Privacy** tab.
- c. Select **Sites**.
- d. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website to allow** field, then click **Add**.

Internet Explorer browser settings must have pop-up blocker set to off for Paychex sites.

- a. Select **Tools | Pop-up Blocker | Pop-up Block Settings**.
- b. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website to allow** field, then click **Add**.

For Mozilla Firefox

To minimize security warnings from displaying during log in, add **landing.paychex.com** and **eenroller.net** to your allowed sites.

- a. Select **Tools | Options**.
- b. Select the **Security** icon.
- c. Select **Firefox Will | Use Custom Settings for History**.
- d. Select **Exceptions**.
- e. In the **Address of the website** field, type **landing.paychex.com** or ***.paychex.com**, and **eenroller.net**.
- f. Click **Allow**.
- g. Click **Close**.
- h. Click **OK**.

- Notes:**
- This procedure may be slightly different depending on the web browser.
 - If you choose not to make this a trusted site, you will need to react to any secure site warnings that display.

Firefox browser settings must be set to allow cookies for Paychex sites.

- a. Select **Tools | Options**.
- b. Select **Privacy**.
- c. For Accept cookies from sites, click **Exceptions**.
- d. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website** field, then click **Allow**.

Firefox browser settings must have pop-up blocker set to off for Paychex sites.

- a. Select **Tools | Options**.
- b. Select **Content**.
- c. For Block pop-up windows, select **Exceptions**.
- b. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website** field, then click **Allow**.

9. Click **Finish**. Your personal Paychex One-Source Solutions account page displays with all the accounts added during registration.

Register Preview Payroll for MyPaychex

Note: For additional information on how to register, refer to **How Do I Register?**.



If you are a new Preview Payroll user, you must go into Preview Payroll first to obtain login information. This links Preview Payroll to your MyPaychex account. Access the URL provided to you by your system administrator or by Paychex.

1. Access the **<https://previewhostingservice.paychex.com>** URL.
2. Enter your username and password.
3. You are prompted to change your password.
4. A screen may display that introduces the single point of entry to MyPaychex. Click **Register** to register for a new MyPaychex account. If a screen does not display, go to **www.mypaychex.com** and click **Register**.

Note: You may defer registration for up to 10 times (once per day) or 90 days by clicking **Register Later**. This takes you directly to the service. To register, complete the steps below.

5. In the Step 1 - Security Check section, type the six characters that display, then click **OK**.
6. In the Step 2 - Add Services or Accounts section, select Preview Payroll. If the Preview Payroll service is added for you, you can skip to the next step.

Notes:

- The account name that displays is the default username that was given to you. You may change the name to an identifier of your choice.
- If you need to add other services, refer to Add Accounts or Services.

- a. Select **Preview Payroll** from the drop-down menu.
- b. In the **Preview Payroll User Name** field, type your Preview username.
- c. In the **Preview Payroll Password** field, type your current Preview password.
- d. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- d. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.

7. In the Step 3 - Personal Information section, complete the required fields.

- Important:**
- Your **Date of Birth** is a required user-defined security key that is needed in the future while performing certain MyPaychex account self help functions.
 - Your **E-mail Address** is required and used to communicate important login information; it should be accessible from wherever you typically use the services you access and must be unique for each MyPaychex user account.

8. In the Step 4 - MyPaychex Login Information section, complete the required fields.

- Important:**
- Your username must be between 8 – 50 characters. Do **not** use spaces. If the username that you want is not available, try adding a word or number to make it unique.
 - Your password must be between eight (8) and 32 characters, and must include at least three (3) of following:
 - one uppercase letter
 - one lowercase letter
 - one number
 - one special character (. [period] @ [at symbol] – [hyphen] _ [underscore] ! [exclamation point] # [number sign] \$ [dollar sign] : [colon] ~ [tilde])
 - You must select a security image that is easy to remember and will be familiar when logging into MyPaychex.

Note: Record your username, password, and the answers to your challenge questions for reference. Ensure they are stored in a secure location.

9. In the Step 5 - Create Your MyPaychex Account section, complete the following:

- a. Click **Create Your MyPaychex Account**.
- b. If you complete the registration process, but want to cancel, click **Cancel Registration**.

10. If you use bookmarks to access your services, click **Bookmark MyPaychex**.

Exception: To set up a bookmark in Firefox, go to the screen you want to bookmark and click **Ctrl + D** or **Bookmark This Page** under the Bookmark menu.

11. An e-mail will be sent for validation. In order to use self help in the future, validate your e-mail address within 24 hours.

For Internet Explorer

To minimize security warnings from displaying during log in, add **<http://landing.paychex.com>**, **<https://landing.paychex.com>**, and **<http://www.eenroller.net>** to your trusted sites. If you have more than one Paychex site, it is recommended that you add *.paychex.com to your trusted sites.

- a. Select **Tools | Internet Options**.
- b. Select the **Security** tab.
- c. On the Security tab, select **Trusted Sites | Sites**.
- d. In the **Add this web site to the zone** field, type the following MyPaychex addresses, **<http://landing.paychex.com>**, **<https://landing.paychex.com>**, and **<http://www.eenroller.net>**.
- e. Click **Add**.
- f. Uncheck the **Require Server Verification (https:)** checkbox for all sites in this zone.
- g. Click **Close**.
- h. Click **OK**.

Internet Explorer browser settings must be set to allow cookies for Paychex sites.

- a. Select **Tools | Internet Options**.
- b. Select the **Privacy** tab.
- c. Select **Sites**.
- d. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website to allow** field, then click **Add**.

Internet Explorer browser settings must have pop-up blocker set to off for Paychex sites.

- a. Select **Tools | Pop-up Blocker | Pop-up Block Settings**.
- b. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website to allow** field, then click **Add**.

For Mozilla Firefox

To minimize security warnings from displaying during log in, add **landing.paychex.com** and **eenroller.net** to your allowed sites.

- a. Select **Tools | Options**.
- b. Select the **Security** icon.
- c. Select **Exceptions**.
- d. In the **Address of the website** field, type **http://landing.paychex.com** or ***.paychex.com**, and **eenroller.net**.
- e. Click **Allow**.
- f. Click **Close**.
- h. Click **OK**.

- Notes:**
- This procedure may be slightly different depending on the web browser.
 - If you choose not to make this a trusted site, you will need to react to any secure site warnings that display.

Firefox browser settings must be set to allow cookies for Paychex sites.

- a. Select **Tools | Options**.
- b. Select **Privacy**.
- c. Select **Firefox Will | Use Custom Settings for History**.
- d. For Accept cookies from sites, click **Exceptions**.
- e. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website** field, then click **Allow**.

Firefox browser settings must have pop-up blocker set to off for Paychex sites.

- a. Select **Tools | Options**.
- b. Select **Content**.
- c. For Block pop-up windows, select **Exceptions**.
- b. Enter ***.paychex.com** and **www.eenroller.net** in the **Address of the website** field, then click **Allow**.

12. Click **Finish**. Your personal Paychex One-Source Solutions account page displays with all the accounts added during registration.

Add Accounts or Services

1. Access the MyPaychex web site at **www.mypaychex.com**.
2. Type your username in the **Username** field. Click **Continue**.
If you forgot your username, click **Forgot Username**.
3. Type your password in the **Password** field. Click **Login**.
If you forgot your password, click **Forgot Password**.
4. Click **Manage User Account**.
5. Click **Add Accounts or Services**.



- A. If you need to add a Time and Labor Online (TLO) account (a time and attendance reporting system), complete the following:
 - a. Select **Time and Labor Online** from the drop-down menu.
 - b. In the **Client ID** field, type the client ID number.
 - c. In the **Time and Labor User Name** field, type your Time and Labor Online (TLO) username.
 - d. In the **Time and Labor Password** field, type your Time and Labor Online (TLO) password.
 - e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.



B. If you need to add a BeneTrac account, complete the following:

- a. Select **BeneTrac** from the drop-down menu.
- b. In the **Employer ID** field, type the employer ID number.
- c. In the **BeneTrac User Name** field, type your BeneTrac username.
- d. In the **BeneTrac Password** field, type your BeneTrac password.
- e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.



C. If you need to add a Preview Payroll account (access Preview through Citrix), complete the following:

- a. Select **Preview Payroll** from the drop-down menu.
- b. In the **Preview Payroll User Name** field, type your Preview username.
- c. In the **Preview Payroll Password** field, type your Preview password.

Note: If this is the first time that you are logging into the Preview Payroll, you must first access <https://previewhostingservice.paychex.com> to obtain current login information.

- d. Click **Verify Account**.

To change the system generated Account Name:

- a. Click **Change Name**.
- b. Type the new name in the applicable field.
- c. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- a. Click **Remove**.
- b. Click **OK** to save the change or click **Cancel** to return to the previous screen.



D. If you need to add a Human Resources Online account (including Employee Access Online and W2 Online), complete the following:

- a. Select **Human Resources Online** from the drop-down menu.
- b. In the **Branch ID** field, type your branch ID.
- c. In the **Client ID** field, type your client ID.
- d. In the **Human Resources Online User Name** field, type your Human Resources Online username.
- e. In the **Human Resources Online Password** field, type your Human Resources Online password.

f. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.



E. If you have a Paychex Online account (administrator/supervisor access to Online Payroll, Online Reports, GL Reporting Service, Retirement Services, Premier/PBS Forms, Health and Benefits), complete the following:

- If you have a username and password, complete the following:
 - a. Select **Paychex Online** from the drop-down menu.
 - b. In the **Paychex Online Username** field, type your Paychex Online username.
 - c. In the **Paychex Online Password** field, type your Paychex Online password.
 - d. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- e. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.

- If you do not have a username and password, complete the following:

Note: If you are a new administrator/supervisor for Online Payroll, Online Reports, or GL Reporting, you must obtain the login information from Paychex.

- a. Select **Paychex Online** from the drop-down menu.
- b. Click **Don't have User Name & Password**.
- c. In the **Registration Code** field, type your Registration Code.
- d. In the **Federal ID** field, type your Federal ID.
- e. In the **Phone Number** field, type your Phone Number.
- f. Check the Plan Administrator Acknowledgement box.
- g. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- h. Click **Create Your MyPaychex Account** to continue.



F. If you have a Benefits Online account (participant access to Retirement Services, Flexible Spending Account, COBRA, Health and Benefits), complete the following:

- If you have a username and password, complete the following:
 - a. Select **Benefits Online** from the drop-down menu.
 - b. In the **Benefits Online Username** field, type your Benefits Online username.
 - c. In the **Benefits Online Password** field, type your Benefits Online password.
 - d. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

e. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.

- If you do not have a username and password, complete the following:
 - a. Select **Benefits Online** from the drop-down menu.
 - b. Click **Don't have User Name & Password**.
 - c. In the **Social Security Number** field, type your social security number.
 - d. In the **Zip Code** field, type your zip code.
 - e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:


- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

- f. Click **Create Your MyPaychex Account** to continue.

6. When you have finished adding services, click **Add to MyPaychex**. Your personal MyPaychex account page displays with all the accounts added during registration.

Change an Account Name

Note: Account names only display when you have multiple accounts.

1. Access the MyPaychex web site at **www.mypaychex.com**.
2. Type your username in the **Username** field. Click **Continue**.
3. Type your password in the **Password** field. Click **Login**.
4. Click  at the right of the account name you would like to change. This is located under the Manage User Account button.
5. Type the new account name in the **Modify Name** field, then click **Save**.

Note: If the account name is already in use, you are prompted to create another name.

Adding a New User – Administrator/Supervisor Use Only

All new users need to be added to the primary service (Preview Payroll, Human Resources Online, Time and Labor Online, BeneTrac, or Paychex Online) before registering for a MyPaychex account. The user is added by either the new load process of the application or by a system administrator/supervisor.

Note: New users for Benefits Online may self register by accessing www.mypaychex.com directly.

The following procedure is completed by the MyPaychex registered client primary contact, administrator/supervisor. Adding the initial user is covered in the procedures for the specific service.

1. Access the MyPaychex website at www.mypaychex.com and login.
2. Access the applicable service. Type the PIN when prompted, and set up the new user following documented procedures for the given service.
3. The system administrator/supervisor will give the new user the following:
 - URL
 - New Preview Payroll users must access the current URL address of the application, <https://previewhostingservice.paychex.com>. They will be prompted to change their password, and then deferred to the MyPaychex.com site. They can then either defer registration and go to the Preview Payroll Site or register using the login credentials provided to add the services to their new MyPaychex account. If the new user is not deferred, they can go to www.mypaychex.com and click **Register**.
 - All other new users (Human Resources Online, Time and Labor Online, and Paychex Online) can access the MyPaychex site (www.mypaychex.com) and register using the login credentials provided to add the services to their new MyPaychex account. Benefits Online new users can self register by accessing www.mypaychex.com directly.
 - Instructions for setting up a MyPaychex account.
 - Login credentials for the applicable primary services.

Example: An administrator/supervisor sends login credentials for Human Resources Online and Time and Labor Online to a new employee, Jim Smith. When he receives them, Jim Smith registers for his new MyPaychex account, using the Human Resources Online and Time and Labor Online credentials to add these two services to MyPaychex.

Access Paychex One-Source Solutions

1. Access the MyPaychex web site at **www.mypaychex.com**.
2. Type your username in the **Username** field. Click **Continue**.

If you forgot your username, click **Forgot Username**. The MyPaychex Get My User Name screen displays.

- a. In the **E-Mail Address** field, type the e-mail address you used to set up your MyPaychex account, then click **Next**. Your username is sent to your e-mail address.
 - b. Click **Go to Login** and type the username e-mailed to you in the **Username** field. Click **Continue**.
3. Verify that your security image displays. If the image that displays is not your security image, double check your username displayed above the security image. If your username is correct, notify your Paychex representative, and do **not** login; you might be on a phishing site.
 4. Type your password in the **Password** field, and then click **Login**. The Paychex One-Source Solutions screen displays.

Note: A warning message displays when your session is inactive for 60 minutes.

If you forgot your password, click **Forgot Password**. The MyPaychex Password Reset screen displays.

- a. Type the six characters that display. Click **Next**.
- b. Type the last four digits of your social security number in the **Last Four Digits of your Social Security Number** field.
- c. Select your date of birth from the **Date of Birth** drop-down menus. Click **Next**.
- d. Type the answer to the Challenge question in the **Answer** field, then click **Next**. This field is not case-sensitive.
- e. Type your new password in the **New Password** field.
- f. Type your new password again in the **Re-enter Password** field, and then click **Reset Password**. For future logins, use this new password.

After resetting your password, you are automatically logged in to Paychex One-Source Solutions, unless you are required to enter a PIN.

5. If you have administrator/supervisor access to the service you registered for, you are required to enter a personal identification number (PIN).

Note: There is only one PIN for Paychex One-Source Solutions.

- If you are an administrator/supervisor logging in for the first time, you will be prompted to create a PIN when you select a service.
 - a. Select a four digit number as your PIN.
 - b. Enter a PIN.
 - c. Re-enter a PIN.
 - d. Click **Create PIN**.
 - If you forgot your PIN, click **Forgot your PIN**. An e-mail is sent to you with instructions for resetting your PIN.
 - If you want to change your PIN, click **Manage User Account | Edit your Profile Information**.
6. Click the service you want to access.
- If you completed the MyPaychex Registration process for Time and Labor Online, complete the following:
 - a. Select the **Time and Labor** tab.
 - b. Select an account. If you have more than one account for the service, a list of accounts display; select the account you would like to access. Otherwise, the selected account displays.
 - c. Click **Submit**.

Note: If you have more than one account, select it from the **Account:** drop-down menu.
 - If you completed the MyPaychex Registration process for BeneTrac, complete the following.
 - a. Select the **Benefits** tab.
 - b. Select an account. If you have more than one account for the service, a list of accounts display; select the account you would like to access. Otherwise, the selected account displays.
 - c. Click **Submit**.

Note: If you have more than one account, select it from the **Account:** drop-down menu.
 - If you completed the MyPaychex Registration process for Preview Payroll, complete the following:
 - a. Select the **Payroll** tab.
 - b. Select an account. If you have more than one account for the service, a list of accounts display; select the account you would like to access. Otherwise, the selected account displays.
 - c. Click **Submit**.

Note: If you have more than one account, select it from the **Account:** drop-down menu.

- If you completed the MyPaychex Registration process for Human Resources Online, complete the following:
 - a. Select the **Human Resources** tab.
 - b. Select an account. If you have more than one account for the service, a list of accounts display; select the account you would like to access. Otherwise, the selected account displays.
 - c. Click **Submit**.

Note: If you have more than one account, select it from the **Account:** drop-down menu.

Home

For Preview Payroll users only, the Home tab displays important messages pertaining to notices, documentation, scheduled maintenance, etc. Otherwise, a Welcome screen displays with the user's first and last name.

Additional Services

For clients registered with Paychex Online or Benefits Online, the Additional Services section displays.

Note: If you select Paychex Online, you are required to enter a PIN. You will be required to create a PIN if you have not yet.

Manage User Accounts

Use Manage User Accounts to Edit Your Profile Information or add more accounts and services.

Support Information, Training and Documentation, and System Requirements are also located in Manage User Accounts.

Add Accounts and Services

- A. If you need to add a Time and Labor account (a time and attendance reporting system), complete the following:
 - a. Select the **Time and Labor** tab.
 - b. In the **Client ID** field, type the client ID number.
 - c. In the **Time and Labor User Name** field, type your Time and Labor username.
 - d. In the **Time and Labor Password** field, type your Time and Labor password.
 - e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.



B. If you need to add a Benefits account, complete the following:

- a. Select the **Benefits** tab.
- b. In the **Employer ID** field, type the employer ID number.
- c. In the **Benefits User Name** field, type your Benefits username.
- d. In the **Benefits Password** field, type your Benefits password.
- e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.



C. If you need to add a Payroll account (access Preview through Citrix), complete the following:

- a. Select the **Payroll** tab.
- b. In the **Payroll User Name** field, type your Payroll username.
- d. In the **Payroll Password** field, type your Payroll password.

Notes:

- If this is the first time that you are logging into the Preview Payroll, you must first access <https://previewhostingservice.paychex.com> to obtain current login information.

- Resizing the Preview screen reloads the application.

d. Click **Verify Account**.



D. If you need to add a Human Resources account (including Employee Access Online and W2 Online), complete the following:

- a. Select the **Human Resources** tab.
- b. In the **Branch ID** field, type your branch ID.
- c. In the **Client ID** field, type your client ID.
- d. In the **Human Resources User Name** field, type your Human Resources username.
- e. In the **Human Resources Password** field, type your Human Resources password.
- f. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.



E. If you have a Paychex Online account (administrator/supervisor access to Online Payroll, Online Reports, GL Reporting Service, Retirement Services, Premier/PBS Forms, Health and Benefits), complete the following:

- If you have a username and password, complete the following:
 - a. Select **Paychex Online** from the drop-down menu.
 - b. In the **Paychex Online Username** field, type your Paychex Online username.
 - c. In the **Paychex Online Password** field, type your Paychex Online password.
 - d. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- e. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.

- If you do not have a username and password, complete the following:

Note: If you are a new administrator/supervisor for Online Payroll, Online Reports, or GL Reporting, you must obtain the login information from Paychex.

- a. Select **Paychex Online** from the drop-down menu.
- b. Click **Don't have User Name & Password**.
- c. In the **Registration Code** field, type your Registration Code.
- d. In the **Federal ID** field, type your Federal ID.
- e. In the **Phone Number** field, type your phone number.
- f. Check the **Plan Administrator Acknowledgement** box.
- g. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- h. Click **Create Your MyPaychex Account** to continue.



F. If you have a Benefits Online account (participant access to Retirement Services, Flexible Spending Account, COBRA, Health and Benefits), complete the following:

- If you have a username and password, complete the following:
 - a. Select **Benefits Online** from the drop-down menu.
 - b. In the **Benefits Online Username** field, type your Benefits Online username.
 - c. In the **Benefits Online Password** field, type your Benefits Online password.
 - d. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
- ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

e. If you have completed adding accounts, click **Create Your MyPaychex Account** to continue.

- If you do not have a username and password, complete the following:
 - a. Select **Benefits Online** from the drop-down menu.
 - b. Click **Don't have User Name & Password**.
 - c. In the **Social Security Number** field, type your social security number.
 - d. In the **Zip Code** field, type your zip code.
 - e. Click **Verify Account**.

To change the system generated Account Name:

- i. Click **Change Name**.
- ii. Type the new name in the applicable field.
- iii. Click **OK** to save the change or click **Cancel** to return to the previous screen.

Note: If the account name is already in use, you are prompted to create another name.

To remove the system generated Account:

- i. Click **Remove**.
 - ii. Click **OK** to save the change or click **Cancel** to return to the previous screen.
- f. Click **Create Your MyPaychex Account** to continue.

When you have finished adding services, click **Add to MyPaychex**. Your personal Paychex One-Source Solutions account page displays with all the accounts added during registration.

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