Compensation History – Manage Employees

Users have the ability to view **compensation history** for each individual employee. Compensation can be viewed as individual pay stubs, or as a period summary. Active employees can also go "paperless," or opt out of receiving a paper version of their W-2 or pay statement.

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Review and Print Period Summary

Follow the steps below to do this task:

- **1** From within the **Manage Employees** area of Perform, click on an employee's name.
- **2** Using the left navigation menu, click **Compensation**, then **Compensation History**.
- Select the **History** tab.
- Click the Date Range dropdown to select the current Year-to-Date, Quarter-to-Date, Month-to-Date, Previous Year, or a Custom Range. If selecting a Custom Date range, indicate the Start and End dates using the calendar button.
- Based on the indicated Date Range, the hours, amounts, or totals will display for the following fields:

Code	Description
Earnings	Hours and/or amounts that were paid to an employee
Deductions	Amount deducted from an employee's pay
Direct Deposits	This section will only display if the employee has active partial direct deposits.
Taxes	Displays amount of tax withheld from the employee. The Tax section also includes Wages, Exempt totals, and Excess totals.

O To return to the Current Year-to-Date display, click Reset

To print the displayed history information, click

PERF C RM

Employe T	Employe T	Socul S. T	Status (3)	Department T	Client ID T	Payroll T	Paygroup				
Mosbacher,	8837	++1,+1-8555	Active	1001 - Base	86478	Payroli 3	Regular				
Owens, Paul	8865	***.**-4898	Active	1001 - Base	85478	Payroll 3	Regular	- 8			
Post, Marvin	8872	***.**.6464	Active	1013 - Execu	86478	Payroll 3	Regular	- 1			
Pratt Lucas	III 1	O Search	for an Employee	0	Search Using Filters		Contraction of the		H	(н	нн
Pride, Kyle					g dearch Using Pillers				N.		n n
Pride, Kyle		Comp	ensation His	story							
		Histor	y Pay Stubs	Tax Documents							
Schuler, Fiona						Date Range	Start Date		End Date	6	
Simpson, Mic	Marvin Post Employee #30					Current Year-to-Date		16	12/31/2017	D Re	set 7
	Employee	Earning				Current Year-to-Date Current Quarter-to-		Hours			Amour
	Company	Reg - Re	egular			Date		130.0000			\$62,185.5
	Compensation	A OT - Ove	ertime Hours		6	Current Month-to-Dat Previous Year	ite	15.0000			\$15,225.0
	Pay Rates	Vac - Va	cation			Custom Range		100.0000			\$12,400.0
	Earnings Deductions	Gross E	arnings					245.0000			\$89,810.5
	Taxes										
	Tax Handling Direct Deposits										
	Compensation History	Deducti	on								Amour
-	ACA Hours Summary	Adv - Ad	vance Deduction								\$611.0
			DD - College Sav Plan -	529 Dir Dep	6						\$5,797.0
		Total De	ductions								\$6,408.0
		Deposit									Amour
			ect Deposit ***2345								\$2,910.2
			irect Deposit ***2345								\$1,940.1
			irect Deposit ***4567								\$4,850.4
			irect Deposit ***5245		- 5						\$4,594.0
			irect Deposit ***7457								\$4,730.1
			irect Deposit ***7568								\$6,921.6
		Total De	posits								\$25,946.7
		_									
		Тах			Employer Amo		ee Amount	Wage	Exempt	Excess	Total Wage
			Federal Income Tax				\$23,899.72	\$89,810.52	\$0.00	\$0.00	\$89,810.5
										\$82,810.52	\$89,810.5
		FUI - Fe	deral Unemployment		\$42	00		\$7,000.00	\$0.00		
		FUI - Fei MED - N	deral Unemployment ledicare - Employee		6		\$1,302.25	\$89,810.52	\$0.00	\$0.00	
		FUI - Fer MED - N MEDER	deral Unemployment ledicare - Employee - Medicare - Employer		-			\$89,810.52 \$89,810.52	\$0.00 \$0.00	\$0.00	\$89,810.5
		FUI - Fer MED - N MEDER SOC - S	deral Unemployment ledicare - Employee - Medicare - Employer ocial Security - Employe		5,02	25	\$1,302.25 \$5,568.26	\$89,810.52 \$89,810.52 \$89,810.52	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00	\$89,810.5 \$89,810.5
		FUI - Fei MED - M MEDER SOC - S SOCER	deral Unemployment ledicare - Employee - Medicare - Employer ocial Security - Employe - Social Security - Employe		6	25	\$5,568.26	\$89,810.52 \$89,810.52 \$89,810.52 \$89,810.52	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$89,810.5 \$89,810.5 \$89,810.5
		FUI - Fei MED - M MEDER SOC - S SOCER KY - Kei	deral Unemployment ledicare - Employee - Medicare - Employer ocial Security - Employe - Social Security - Employe - Social Security - Employe	oyer	5,02	25	\$5,568.26 \$1,226.20	\$89,810.52 \$89,810.52 \$89,810.52 \$89,810.52 \$89,810.52 \$21,105.63	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00	\$89,810.5 \$89,810.5 \$89,810.5 \$21,105.6
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Review and Print Pay Stubs

Follow the steps below to do this task:

- From within the **Manage Employees** area of Perform, click on an employee's name.
- **2** Using the left navigation menu, click **Compensation**, then **Compensation History**.
- Select the **Pay Stubs** tab.
- Select the **Year** dropdown to display the desired tax year.
- **5** To see the "**Easy View**" details of a check onscreen, click on its check number. The Easy View detail will display.
- 6 You may click **View PDF** to a pay stub. The document will open in a new screen.
- To print one or more stubs for the current year, mark the applicable checkboxes and click the **Print Selected Pay Stub** button. The document will also open in a new screen.

	н	istory Pay	Stubs Tax Doc	uments			
			3				Select Year
Marvin Post							2016
Employee #30		Number	Туре	Pay Date	Gross	Net	2017
Employee	•	10001	5	2010010	004 405 00		2016
Company	•	10031	Regular	6/24/2016	\$21,105.63	\$565.94	VIEW 1 DI
Compensation	•	▶ 10022	Regular	5/24/2016	\$21,105.63	\$2,183.11	View PDF
Pay Rates		• 10010	Regular	4/22/2016	\$21,105.63	\$8,073.80	View PDF
Earnings							
Deductions		▶ 10003	Regular	3/24/2016	\$26,493.63	\$14,442.56	View PDF
Taxes							
Tax Handling	Pr	int Selected Pay St	ubs for 2016				
Direct Deposits							

Screenshots are continued on the next page

Marvin Post					Sele 201	ct Year
Employee #30 Employee	Number	Туре	Pay Date	Gross	Net	Actions
company V	10031	Regular	6/24/2016	\$21,105.63	\$565.94	View PDF
Compensation	□ → 10022	Regular	5/24/2016	\$21,105.63	\$2,183.11	View PDF
ay Rates	5 - 10010	Regular	4/22/2016	\$21,105.63	\$8,073.80	View PDF 6
arnings		INegular	4/22/2010	\$21,103.03	ψ0,075.00	
eductions	Earnings		Rate	Hours	Amount	
ixes						
x Handling rect Deposits	Reg		10.00	10.00	\$16,030.63	
ompensation History	OT		15.00	5.00	\$5,075.00	
CA Hours Summary	Gross Earnir	igs		15.00	\$21,105.63	
Time & Attendance 🔹						
	Deductions				Amount	
	ColSvPDD				\$1,932.34	
	Total Deduct	ions			\$1,932.34	
	Taxes				Amount	
	FITWH				\$5,530.42	
	MED				\$306.03	
	SOC				\$1,308.55	
	Total Taxes				\$7,145.00	
	Net Wages	0			\$12,028.29	
	DD ***2345				\$718.82	
	DD1 ***2345				\$479.21	
	DD2 ***4567				\$1,198.03	
	DD3 ***5245				\$1,558.43	
	Net				\$8,073.80	

Screenshot is continued on the next page

Depar SSN:	tment # 1001 ***-**-6445		OH		d 🕖					Net Waged DD1 DD2 DDCheckin DD-Sav DD-Saving	25 100 9 50 50
BI-WEEKLY	RATE	HOUR/UNIT	CURRENT \$	YTD HR/UNIT	YTD \$	DEDUCTION	CURRENT \$	YTD \$	TAX	CURRENT \$	YTD \$
Hourly	25.00	80.00	2,000.00	560.00	14,000.00				FITWH MED SOC OH OHNOR	276.78 29.00 54.00 57.29 40.00	1,950.1 203.0 378.00 401.0 280.0
1,287.93	TOTALS	80.00	2,000.00	560.00	14,000.00					457.07	3,212.1
Paythis An		1565 TO MOSCO	m Design MAHAWK TRA W OH 45153	IL FILLL	ITRECE	IDT **				eposit # 10687 Date 04/01/	2016
L	Pay to the	ADEL			1001 D			TO AC BANK	CCOUNT:	XXXXXX031	
	Order of			en itgomery Ro i, OH 45236	ad			NO	N - N E G	OTIABLE	

Review and Print Tax Documents

Follow the steps below to locate an employee and navigate to compensation history:

- 1 In the Manage Employees area of Perform, click on an employee's name.
- **2** Using the left navigation menu, click **Compensation**, then **Compensation History**.
- Select the **Tax Documents** tab.
- 4 To print a tax document, mark its checkbox and click
- **5** To open a tax document or display it onscreen, click on the document's name.

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		Compen	sation	History											
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Void a Check

A user will have the ability to void checks <u>only</u> if they have one of the following security roles: Full Access, Submit Payroll, or Approve Payroll. You will <u>not</u> be able to void a check from a prior year.

Note: When voiding third party sick pay (3PS) checks, make sure to process the 3PS check void on a separate check run from the reissue of the 3PS check.

Follow these steps to void a check:

- Navigate to the Pay Stubs tab.
- 2 Make sure the current year is displayed.
- Locate the appropriate check, and click the Void button. The **Void Check** page opens with details of the check displayed.
 - Note: If the check you wish to void was issued in a prior quarter, you will see a message indicating that this could result in necessary changes to the tax information that was filed for the quarter. To reissue a prior quarter voided check, please consult your Payroll Specialist.
- To immediately replace the voided check, check the **Replace Check** checkbox. If checked, the check will be replaced and reissued as the original check type and it will match the void amount exactly. If you want to reissue the voided check as something other than the original check type, or reissue as a different amount (such as when an employee is overpaid), just choose to *not* replace the check here and recreate the check to your specifications from within the paygrid.
 - The Replace Check option is not available for manual or 3PS checks. You can reissue voided manual and 3PS checks manually from within the paygrid.
- Click Save. Once added, the check's Actions column will display "Void Pending." The voided check will be added to the next scheduled payrun.
 - Note: This data will also be able to be found on the Review screen shown as its own line item. Once the payrun is processed, the voided check will still appear but will have a line through it. Additionally, a new line will be added with the check details in italics showings the successfully voided transaction.

					Select Year
Number	Туре	Pay Date	Gross	Net	2017 Actions
> 23425251	Regular	3/10/2017	\$1,940.00	\$1,644.23	View PDF Ø Vo

	Q Search for an Employee	0 Search Using Filters		1		0 0
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80829 - Contoso, Ltd.	0 1017975333	quarter. Volding it could change information filed in the past a to the next pay run for this employee's paygroup. It will proce	and have tax implications. We'll add this ss when payroll is submitted.	\$1,677.84	U View PDF	Void Pending
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Deductions Taxes		Replace Check				
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Compensation History						

Note: If you inadvertently select the wrong check to void, you must simply go to the paygrid and **Delete** the voided check that has been added.

"Paperless" Options: Opting Out of Paper W-2 and Pay Statements

Every active employee has the ability to opt out of receiving a paper version of their W-2 and/or **pay statement**. Opting out of the paper version means that the employee will only receive an electronic copy of their W-2 form. That electronic copy can then be printed out as many times as the employee needs and it will always be stored within the Paycor Perform software application for future access and retrieval.

In compliance with IRS regulations, only employees can edit their paperless W-2 consent information within Perform. Administrators and manager-level users within the organization are able to view the employee's selection.

- Admin users can view a report of employees who have registered to receive their W-2 and/or pay stubs via Perform instead of paper format by going to Configure Company > Payroll > Paperless.
 - Only active employees can opt into paperless (i.e. not Terminated, Resigned, Retired, Deceased).

Paperless W-2

Employees must choose to go paperless by December 16 in order to only receive an electronic W-2 for the current tax year. A confirmation email will be sent to their email saved in the Perform software application once the consent waiver is electronically signed and saved.

In the **Manage Employees** area of Perform, click on an employee's name.

- 2 Using the left navigation menu, click **Compensation**, then **Compensation History**.
- 3 Select the **Paperless Options** tab.

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First EmpOne Employee #1	Compensation History 🧕			
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ime & Attendance 🧲 🔻	, , , , , , , , , , , , , , , , , , ,			

- To opt out of receiving a paper W-2 form, the employee must check the Paperless On checkbox. This opens a consent form that they will need to read and electronically sign.
- S After reading the consent waiver and agreeing to no longer have paper copies of the W-2 provided by their employer, the employee clicks **Sign and Continue**. The Paperless On checkbox is now checked.

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First EmpOne Employee #1	Compensation History o	
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Direct Deposits	Selecting the Paperless On option results in paper copies no longer being provided by your employer.	
Compensation History	Document	Paperless On
Time & Attendance 🔻	W-2s These yearly documents are needed to file your taxes with the IRS.	4

Consent to Ele	ectronic W-2s			×
	ctific IRS regulations to use electronic W-2's and emplo sure information and instructions for you to consent to r ayroll Department.			
	d, if you wish to receive all future W-2 statements from a paper copy of your W-2 statement.	this company electronically, provide	your consent. If you do not provide this conse	nt by December
To provide your consent to receiv	e your W-2 electronically, click "I consent to receiving	my W-2s electronically."		Phiperlinis (2r)
This consent will cease if the em	ployee is no longer employed at Arun_Automation_C	Dne.		
	ceive his/her W-2 statement electronically may withdra atically generated. If consent is withdrawn, it will only b			received and a
Employees are also required to i	nform their company promptly of any personal address	s or status changes.		
Electronic W-2 statements will be	e accessible at least through October of next year.			
	I consent to receiving my W-2s electronically. Electronic Signature*		6	
	First EmpOne	11/13/2017	Sign & Continue	
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Note: If the employee ever wants to review the consent waiver again, they can click the Consent Waiver link.

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First EmpOne Employee #1	Compensation History o	
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ime & Attendance 🔻	W-2s These yearly documents are needed to file your taxes with the IRS Consent Waiver	

Note: If the employee wants to change their Paperless On setting, they need to click the Paperless On checkbox to remove the checkmark. A pop up window appears where they can choose Yes, turn paperless off.

Paperless Opt-Out	×
A Paper documents are less s receive a paper copy of you	secure. Are you sure you want to Ir W-2s ?
Cancel	Yes, turn paperless off

Paperless Pay Statement

Many employees no longer want paper check stubs and want an electronic copy instead, regardless of their company's method of check delivery.

Note: For compliance reasons, only employees can edit their paperless pay statement information within Perform. Administrators and manager-level users within the organization are able to view the employee's selection.

In the **Manage Employees** area of Perform, click on an employee's name.

- 2 Using the left navigation menu, click **Compensation**, then **Compensation History**.
- Select the **Paperless Options** tab.

If the employee opts out of receiving a paper pay statement, the **Paperless On** checkbox will be checked.

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Michelle Andler Employee #4	Selecting the Pa	erless On option re	sults in paper copies no longer being provided by your employer.				
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Compensation	Pay Statement	Direct Deposit Pape	rless Statement.				
Pay Rates							
Earnings							
Deductions							
Taxes							
Tax Handling							
Direct Deposits Compensation History							
ACA Hours Summary	1						