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.
3. Select the History tab.
4. 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.
5. Based on the indicated Date Range, the hours, amounts, or totals will display for the following fields:

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

6. To return to the Current Year-to-Date display, click Reset.
7. To print the displayed history information, click Print.
Review and Print Pay Stubs

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.
3. Select the Pay Stubs tab.
4. 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.
7. 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.
### Compensation History

<table>
<thead>
<tr>
<th>Number</th>
<th>Type</th>
<th>Pay Date</th>
<th>Gross</th>
<th>Net</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>10031</td>
<td>Regular</td>
<td>9/24/2016</td>
<td>$21,105.63</td>
<td>$19,309.94</td>
<td>View PDF</td>
</tr>
<tr>
<td>10022</td>
<td>Regular</td>
<td>9/24/2016</td>
<td>$21,105.63</td>
<td>$19,309.94</td>
<td>View PDF</td>
</tr>
<tr>
<td>10010</td>
<td>Regular</td>
<td>4/22/2016</td>
<td>$21,105.63</td>
<td>$8,073.80</td>
<td>View PDF</td>
</tr>
</tbody>
</table>

**Earnings**

<table>
<thead>
<tr>
<th>Earnings</th>
<th>Rate</th>
<th>Hours</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg</td>
<td>10.00</td>
<td>10.00</td>
<td>$18,030.63</td>
</tr>
<tr>
<td>OT</td>
<td>15.00</td>
<td>5.00</td>
<td>$5,075.00</td>
</tr>
<tr>
<td>Gross Earnings</td>
<td></td>
<td></td>
<td>$21,105.63</td>
</tr>
</tbody>
</table>

**Deductions**

- COL/PDD: $1,932.34
- Total Deductions: $1,832.34

**Taxes**

- FIT/WH: $5,550.42
- MED: $100.00
- SOC: $1,309.55
- Total Taxes: $7,145.00

**Net Wages**

- DO ***2345: $7,183.02
- DO1 ***3456: $4,752.11
- DO2 ***4567: $1,088.03
- DO3 ***5432: $1,558.43
- Net: $8,073.80

Click on the highlighted numbers to view the detailed compensation history for the respective pay periods.
### Employee and Tax Info

<table>
<thead>
<tr>
<th>Payor</th>
<th>EIN</th>
<th>1071-2203-0815-530</th>
</tr>
</thead>
</table>

**Employee #**: 13  
**Department #**: 1001  
**SSN**: ****-**-6445

- **Weekly Rate**: $25.00  
- **Weekly Hours**: 40.00  
- **YTD Amount**: 2,000.00  
- **YTD Wages**: 1,643.02  
- **DD1**: 25.90  
- **ując**: 23.90  
- **DD3**: 29.30  
- **Deduction**: 50.00  
- **DD**: 83.00  
- **DD**: 100.00

### 6 and 7

**Note**: This is not a check. This document is to be used for informational purposes only.

**Perform Design**  
1565 Tomahawk Trail Pkwy  
MCCONOH 45163

**Direct Deposit #**: 1066730529  
**Date**: 04/01/2016

**Pay to the Order of**:  
Laura Allen  
4811 Montgomery Road  
Cincinnati, OH 45236

**DIRECT DEPOSIT**: $1,287.03  
**TO ACCOUNT**: 254  
**BANK**: XXXXXX0014  
**NON-NEGOTIABLE**

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**Updated**: 5/14/19  
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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.
3. Select the Tax Documents tab.
4. To print a tax document, mark its checkbox and click Print.
5. To open a tax document or display it onscreen, click on the document’s name.

![Image of Compensation History page with steps 1, 2, 3, 4, and 5 highlighted]
**Void a Check**

A user will have the ability to void checks only if they have one of the following security roles: Full Access, Submit Payroll, or Approve Payroll. You will not 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:

1. Navigate to the **Pay Stubs** tab.

2. Make sure the current year is displayed.

3. 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.

4. 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.

5. 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 showing the successfully voided transaction.
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.

Note:
- 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.

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**.
3. Select the **Paperless Options** tab.
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.

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.
Note: If the employee ever wants to review the consent waiver again, they can click the Consent Waiver link.

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

⚠️ Paper documents are less secure. Are you sure you want to receive a paper copy of your 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.

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