

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:

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.

- 6 To return to the **Current Year-to-Date** display, click .
- 7 To print the displayed history information, click .

1

2

3

4

5

6

7

7

Compensation History

History | Pay Stubs | Tax Documents

Date Range

Current Year-to-Date

Start Date: 01/01/2016 End Date: 12/31/2017

Reset Print

Earning

	Hours	Amount
Reg - Regular	130.0000	\$62,185.52
OT - Overtime Hours	15.0000	\$15,225.00
Vac - Vacation	100.0000	\$12,400.00
Gross Earnings	245.0000	\$89,810.52

Deduction

	Amount
Adv - Advance Deduction	\$611.06
ColSvPDD - College Sav Plan - 529 Dir Dep	\$5,797.02
Total Deductions	\$6,408.08

Deposit

	Amount
DD - Direct Deposit ***2345	\$2,910.28
DD1 - Direct Deposit ***2345	\$1,940.18
DD2 - Direct Deposit ***4567	\$4,850.46
DD3 - Direct Deposit ***5245	\$4,594.04
DD4 - Direct Deposit ***7457	\$4,730.10
DD5 - Direct Deposit ***7568	\$6,921.69
Total Deposits	\$25,946.75

Tax

	Employer Amount	Employee Amount	Wage	Exempt	Excess	Total Wages
FITWH - Federal Income Tax		\$23,899.72	\$89,810.52	\$0.00	\$0.00	\$89,810.52
FUI - Federal Unemployment	\$42.00		\$7,000.00	\$0.00	\$82,810.52	\$89,810.52
MED - Medicare - Employee		\$1,302.25	\$89,810.52	\$0.00	\$0.00	\$89,810.52
MEDER - Medicare - Employer	\$1,302.25		\$89,810.52	\$0.00	\$0.00	\$89,810.52
SOC - Social Security - Employee		\$5,568.26	\$89,810.52	\$0.00	\$0.00	\$89,810.52
SOCER - Social Security - Employer	\$5,568.26		\$89,810.52	\$0.00	\$0.00	\$89,810.52
KY - Kentucky State Treasurer		\$1,226.20	\$21,105.63	\$0.00	\$0.00	\$21,105.63
KYBND - Boone County Ky MH MR SC		\$25.00	\$16,666.00	\$4,221.13	\$21,324.13	\$42,211.26
KYBON - Boone County Ky Ord 430-1		\$168.85	\$21,105.63	\$0.00	\$0.00	\$21,105.63
Total Taxes	\$6,912.51	\$32,190.28				

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.
- 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


History | **Pay Stubs** | Tax Documents

Select Year: 2016 (dropdown menu showing 2016, 2017, 2018)

Number	Type	Pay Date	Gross	Net	
<input checked="" type="checkbox"/> 10031	Regular	6/24/2016	\$21,105.63	\$565.94	View PDF
<input type="checkbox"/> 10022	Regular	5/24/2016	\$21,105.63	\$2,183.11	View PDF
<input type="checkbox"/> 10010	Regular	4/22/2016	\$21,105.63	\$8,073.80	View PDF
<input type="checkbox"/> 10003	Regular	3/24/2016	\$26,493.63	\$14,442.56	View PDF

Print Selected Pay Stubs for 2016

Screenshots are continued on the next page



Employee

Company

Compensation

Pay Rates

Earnings

Deductions

Taxes

Tax Handling

Direct Deposits

Compensation History

ACA Hours Summary

Time & Attendance

Compensation History

[History](#) | [Pay Stubs](#) | [Tax Documents](#)

Select Year
2016

Number	Type	Pay Date	Gross	Net	Actions
<input type="checkbox"/> 10031	Regular	6/24/2016	\$21,105.63	\$565.94	View PDF
<input type="checkbox"/> 10022	Regular	5/24/2016	\$21,105.63	\$2,183.11	View PDF
<input checked="" type="checkbox"/> 10010	Regular	4/22/2016	\$21,105.63	\$8,073.80	View PDF

Earnings

	Rate	Hours	Amount
Reg	10.00	10.00	\$16,030.63
OT	15.00	5.00	\$5,075.00
Gross Earnings		15.00	\$21,105.63

Deductions

	Amount
ColSvPDD	\$1,932.34
Total Deductions	\$1,932.34

Taxes

	Amount
FITWH	\$5,530.42
MED	\$306.03
SOC	\$1,308.55
Total Taxes	\$7,145.00

Net Wages

DD ***2345	\$718.82
DD1 ***2345	\$479.21
DD2 ***4567	\$1,198.03
DD3 ***5245	\$1,558.43
Net	\$8,073.80

<input checked="" type="checkbox"/> 10003	Regular	3/24/2016	\$26,493.63	\$14,442.56	View PDF
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Print Selected Pay Stubs for 2016

Screenshot is continued on the next page

EMPLOYEE AND TAX INFO

Paycor EEID 1071-2203-0801-239

OTHER INFO

Direct Deposit # 1068730529

Employee # 13
Department # 1001
SSN: ***-**-6445FITWH S 1
OH S 1

Net Wages	1,542.93
DD1	25.00
DD2	100.00
DDChecking	50.00
DD-Sav	50.00
DD-Savings	50.00

6 and 7

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	1,950.15 203.00 378.00 401.03 280.00
NET	1,267.93	TOTALS	80.00	2,000.00	560.00	14,000.00				457.07	3,212.18

THIS IS NOT A CHECK. THIS DOCUMENT IS TO BE USED FOR INFORMATIONAL PURPOSES ONLY.

Perform Design

1565 TOMAHAWK TRAIL FILL
MOSCOW OH 45153

Direct Deposit # 1068730529

Date 04/01/2018

Pay this Amount

**** NON-NEGOTIABLE ** DIRECT DEPOSIT RECEIPT ****

VOID ** VOID **


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

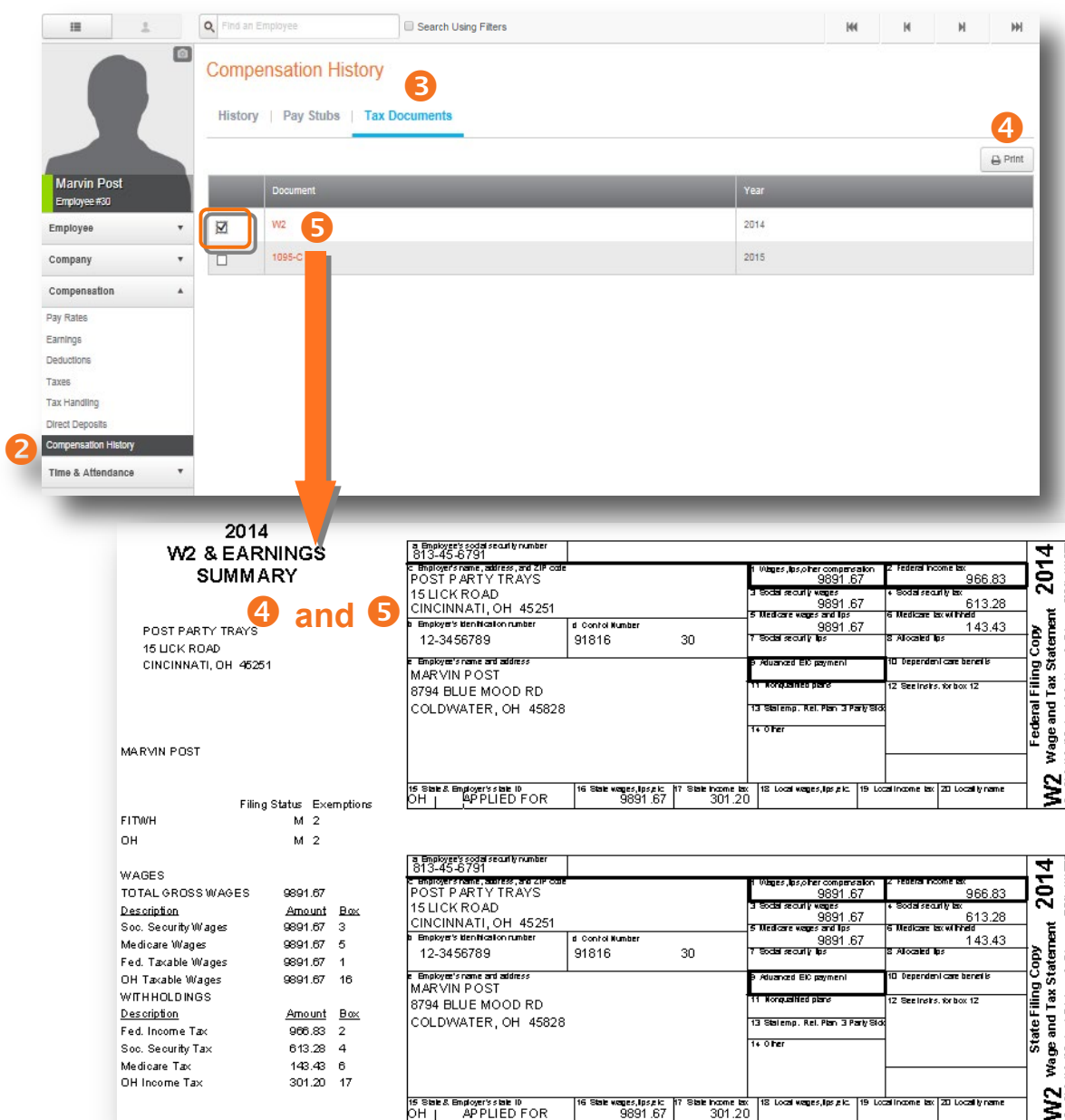
1001 DD

 DIRECT DEPOSIT \$1,267.93
 TO ACCOUNT # 254
 BANK # XXXXX0314
NON-NEGOTIABLE

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 .
- 5 To open a tax document or display it onscreen, click on the document's name.



2014 W2 & EARNINGS SUMMARY

POST PARTY TRAYS
15 LICK ROAD
CINCINNATI, OH 45251

MARVIN POST

Filing Status: FITWH
Exemptions: M 2, OH M 2

Description	Amount	Box
WAGES		
TOTAL GROSS WAGES	9891.67	
Soc. Security Wages	9891.67	3
Medicare Wages	9891.67	5
Fed. Taxable Wages	9891.67	1
OH Taxable Wages	9891.67	16
WITHHOLDINGS		
Fed. Income Tax	966.83	2
Soc. Security Tax	613.28	4
Medicare Tax	143.43	6
OH Income Tax	301.20	17

2014 W2 Wage and Tax Statement

Employee's social security number: 813-45-6791
Employee's name, address, and ZIP code: POST PARTY TRAYS, 15 LICK ROAD, CINCINNATI, OH 45251
Employee's identification number: 12-3456789
Control Number: 91816, 30
Employee's name and address: MARVIN POST, 8794 BLUE MOOD RD, COLDWATER, OH 45828
State & Employer's state ID: OH APPLIED FOR
State wages, tips, etc.: 9891.67
State income tax: 301.20
Local wages, tips, etc.:
Local income tax:
Locality name:

Wages, tips, other compensation: 9891.67
Federal income tax: 966.83
Social security wages: 9891.67
Social security tax: 613.28
Medicare wages and tips: 9891.67
Medicare tax withheld: 143.43
Advanced EIC payment:
Nonqualified plans:
State emp., Ret. Plan, 3 Party Stod:
Other:
Dependent care benefits:
See instructions for box 12:


2014 W2 Wage and Tax Statement

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.

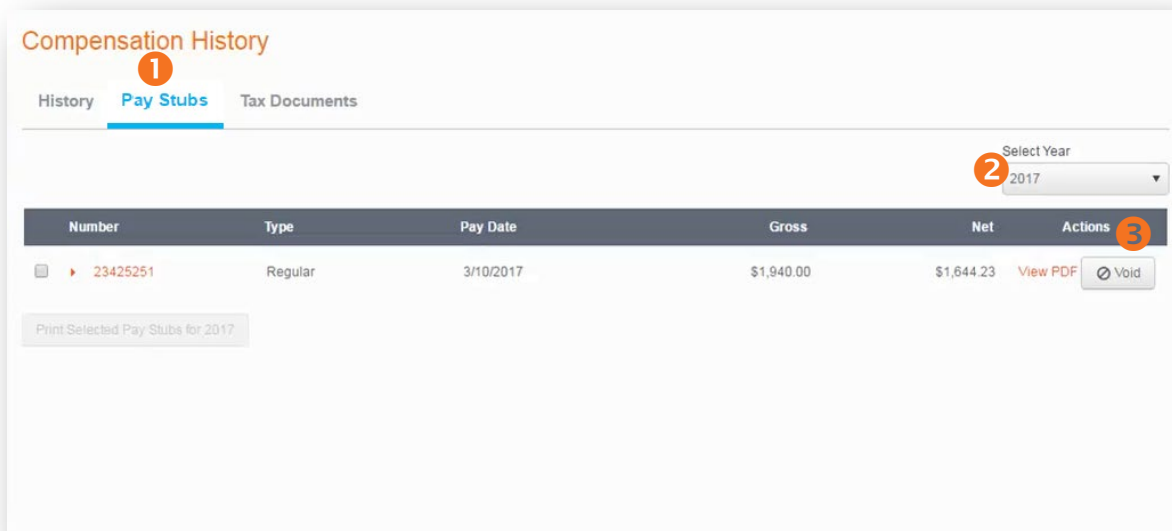
Note: If the check you wish to void was issued in a prior quarter, you will see a message indicating that this could result in necessary changes to the tax information that was filed for the quarter. To reissue a prior quarter voided check, please consult your Payroll Specialist.

- 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 showings the successfully voided transaction.



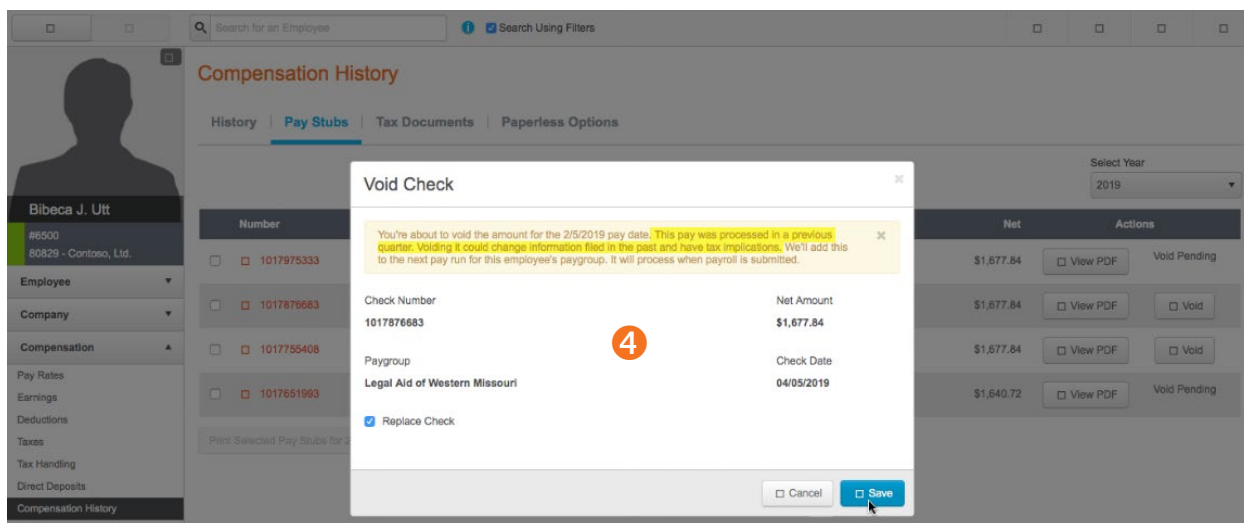
Compensation History

1 **Pay Stubs** | History | Tax Documents

Select Year: 2017

Number	Type	Pay Date	Gross	Net	Actions
23425251	Regular	3/10/2017	\$1,940.00	\$1,644.23	View PDF 

Print Selected Pay Stubs for 2017



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.

PERFORM

Welcome, First My Settings Sign Out

Home Me

Get Help Give Feedback

First EmpOne
Employee #1

Employee

Company

Compensation

Direct Deposits

Compensation History

Time & Attendance

Compensation History

History Pay Stubs Tax Documents Paperless Options

Date Range: Current Year-to-Date Start Date: 01/01/2017 End Date: 12/31/2017 Reset Print

Earning	Hours	Amount
Gross Earnings	0.0000	\$0.00

- 4 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.
- 5 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.

PERFORM

Welcome, First My Settings Sign Out

Home Me

Get Help Give Feedback

First EmpOne
Employee #1

Employee

Company

Compensation

Direct Deposits

Compensation History

Time & Attendance

Compensation History

History Pay Stubs Tax Documents Paperless Options

Selecting the **Paperless On** option results in paper copies no longer being provided by your employer.

Document

W-2s These yearly documents are needed to file your taxes with the IRS.

Paperless On

Consent to Electronic W-2s

Employers must comply with specific IRS regulations to use electronic W-2's and employees must provide their consent to receive an electronic W-2 instead of a paper copy. This notice contains the required IRS disclosure information and instructions for you to consent to receiving your W-2 electronically. If you have any questions regarding this notice or your W-2 Statement, contact the Internal Payroll Department.

Please read this entire notice and, if you wish to receive all future W-2 statements from this company electronically, provide your consent. If you do not provide this consent by December 16th, you will continue to receive a paper copy of your W-2 statement.

To provide your consent to receive your W-2 electronically, click "I consent to receiving my W-2s electronically."

This consent will cease if the employee is no longer employed at **Arun_Automation_One**.

An employee who chooses to receive his/her W-2 statement electronically may withdraw consent. The employee's withdrawal of consent will be effective on the date it is received and a confirmation email will be automatically generated. If consent is withdrawn, it will only be effective for those W-2 statements not yet issued.

Employees are also required to inform their company promptly of any personal address or status changes.

Electronic W-2 statements will be accessible at least through October of next year.

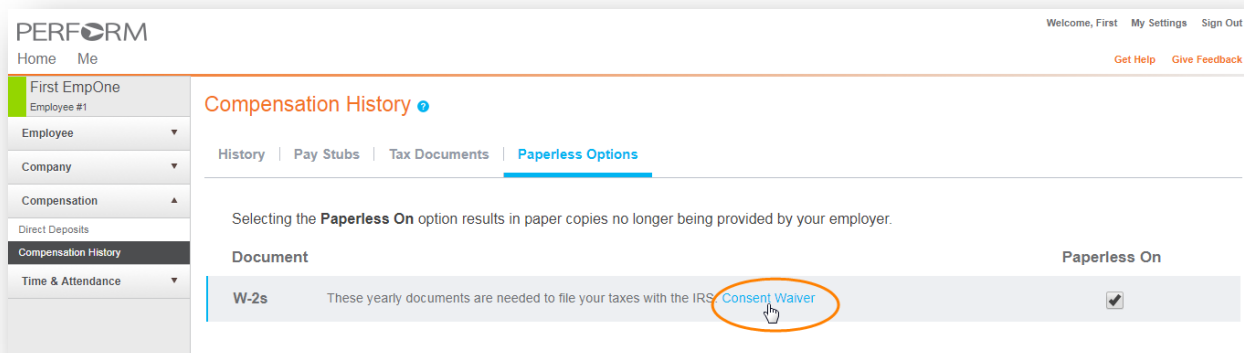
I consent to receiving my W-2s electronically.

Electronic Signature*

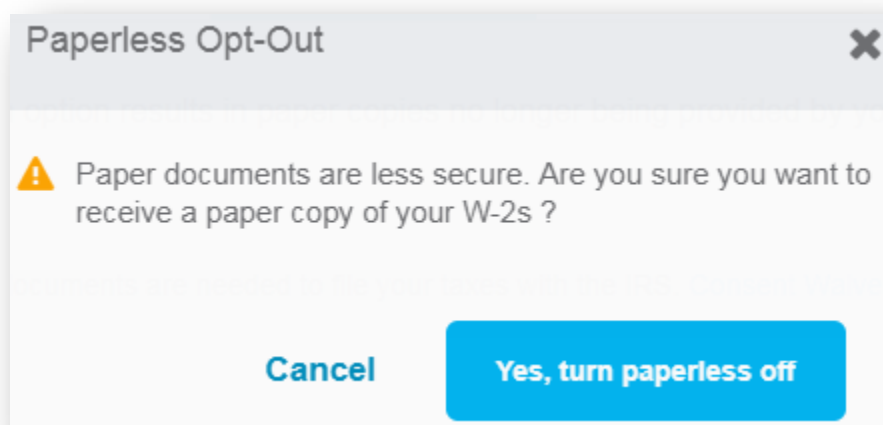
First EmpOne 11/13/2017

Sign & Continue

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 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.

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

The screenshot shows the 'Compensation History' page for employee Michelle Andler. The 'Paperless Options' tab is selected. A message states: 'Selecting the **Paperless On** option results in paper copies no longer being provided by your employer.' Below this is a table with two columns: 'Document' and 'Paperless On'.

Document	Paperless On
W-2s These yearly documents are needed to file your taxes with the IRS.	<input type="checkbox"/>
Pay Statement Direct Deposit Paperless Statement. ⓘ	<input type="checkbox"/>