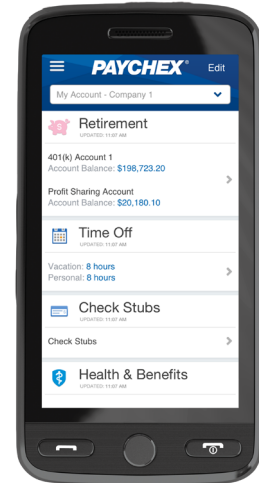# Using the Paychex Flex App

The Paychex® FlexSM app offers clients, employees, accountants/CPAs, and approved contractors an easy way to access their Paychex Flex account (www.paychexflex.com) from an Apple® iPhone®, Apple iPod touch®, or Android™-powered smartphone.

The Paychex Flex app gives you 24/7 wireless Internet access to your payroll and benefits data with the tap of an icon.

First, Get Registered!

Before using the Paychex Flex app for the first time, you must complete your Paychex Flex account registration using a desktop or laptop computer connected to the Internet.

For assistance in registering or connecting to your Paychex Flex account, please contact your company's administrator.

You may also access the Mobile Support site for more information about using the Paychex Flex app.

Get the Paychex Flex App

The Paychex Flex app is used to access Paychex Flex Payroll, Employee Access Online, and Health & Benefits/Retirement Services product information using a smartphone or similar device.

You may download the Paychex Flex app for your smartphone or similar device from the Apple® App StoreSM or Google® Play™.

i *Important! The Paychex Flex app is only available to users with a Paychex Flex account who access www.paychexflex.com for their online services.*

Users who access these sites cannot use the Paychex Flex app:
- *» www.mypaychex.com*
- *» online.paychex.com*
- *» benefits.paychex.com*

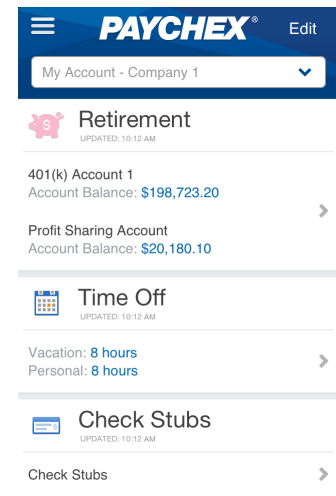*i* *Tap the applicable store link on the Mobile Support site www.paychex.com/print/mobile to locate the app you need.*

i *For the current requirements for using the Paychex Flex, go to www.paychex.com/resources/requirements.aspx*

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What Can I Access With the App?

The Paychex Flex app provides dashboard access to your Paychex Flex account data. You can access the following personal information:

- **Retirement**
  Information about retirement accounts, investment balance, performance, and loan information. Ability to edit contributions and investment allocations.

- **Time Off**
  Vacation and personal time off balances, and accrual information

- **Check Stubs**
  Check information and net pay allocations

- **Health & Benefits**
  Benefits information, including coverage elections and types, eligibility date and status, premium amounts, member guide, and links to carrier information.

- **FSA**
  Information about unreimbursed medical/dental and dependent care expenses, reimbursements, elections, and claims history and debit cards

- **Tax Documents**
  Forms W-2

- **My Profile**
  Employee profile information, work details, personal details, pay/compensation, earnings, federal taxes, unemployment, state taxes, city taxes, and deductions

App Security

The Paychex Flex app logs you out after being idle for five minutes. After the app logs out, you must log back in from the Log In screen. You may log out at any time by tapping **Log Out** on the side navigation panel (refer to the following page).

i *Available features on the dashboard are determined by your company profile. For example, if your company has not subscribed to a retirement plan, **Retirement** will not display.*

i *Paychex apps and procedures employ strict security standards. You can also protect your data by:*

- » *never leaving your smartphone unattended in public places.*
- » *setting your smartphone to lock or time out. Require a password.*
- » *regularly checking for operating system updates to ensure you have the latest security features.*
- » *downloading apps only from an approved marketplace.*

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Viewing the App Demos

You have access to employer- and employee-version demonstrations of the Paychex Flex app. These sample demos enable you to see the app in action, without needing to log in to your Paychex Flex account.
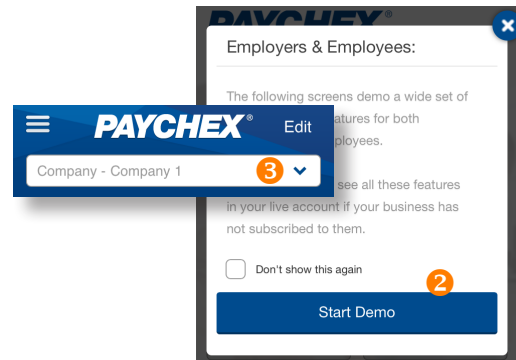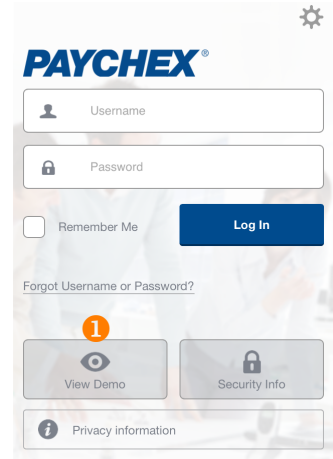
START DEMO

To begin, tap **View Demo** ❶ at the bottom of the Log In screen, then tap **Start Demo**. ❷

VIEW EMPLOYER AND EMPLOYEE DEMOS

To switch from the employer demo to the employee demo, tap the Company - Company 1 drop-down menu in the dashboard header, then tap **My Account - Company 1**. ❸

LEAVE DEMO

To exit the demo, tap ▤ (Menu) and then tap **Leave Demo**.

Navigating in the App

SIDE NAVIGATION

- To display the side navigation panel, tap ▤ (Menu).

  The side panel is the easiest way to access the dashboard items.
- To select a dashboard item, tap its name.
- To scroll the side panel, swipe up or down the screen.

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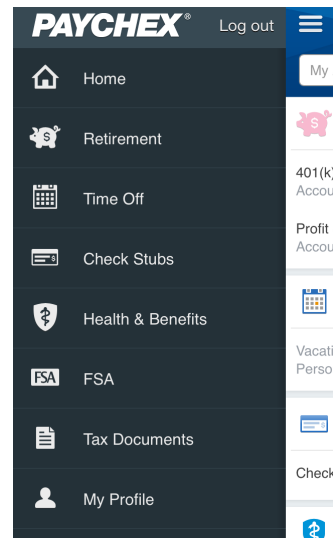
DASHBOARD NAVIGATION

- To go to the next level of detail, tap ❯ next to a dashboard item.
- To scroll the dashboard, swipe up or down the screen.
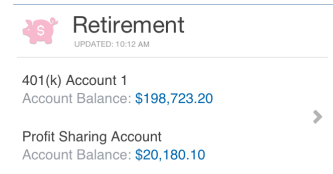
SWIPEABLE NAVIGATION TABS

To select a top navigation tab, tap the displayed topic name. You may need to swipe left or right to access all topics.
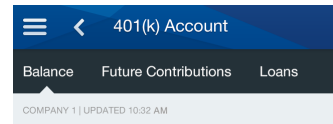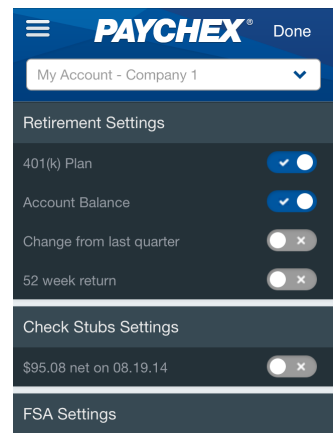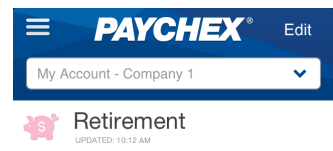
OTHER

To move back one screen, tap ❮.

Customizing the Dashboard

You can customize how the Paychex Flex app displays your data.

- To customize the dashboard, tap **Edit**.
- To display or hide items, slide or tap ✔⬤ (On) or ⬤✕ (Off)..
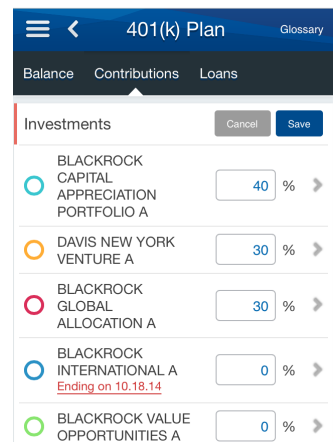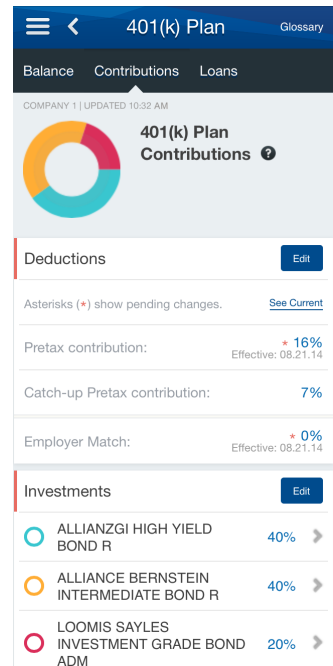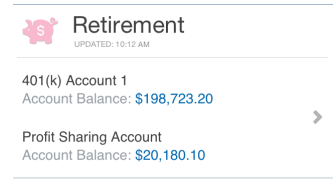- Tap **Save**.

The dashboard is controlled by your company profile and subscribed products. For example, payroll-only users do not see Retirement and FSA, just Check Stubs and Time Off.

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Accessing Dashboard Items

RETIREMENT

- To view a list of your retirement accounts and a brief summary of balance and vested balance, tap ☰ (Menu) and then tap **Retirement** from the side panel, or tap ❯ in the Retirement item on the dashboard.

- For more details about an investment, including performance and trading information, tap ❯.

- To return to the Balance page, tap ❮.

- To view your payroll deductions and employer match (if applicable), and how your money will be invested the next time a contribution is made, tap the **Contributions** top navigation tab.

- To change your deduction amounts, tap **Edit**.

- To view a list of fund types and a definition of each, tap **Glossary**.

- To view each active loan, along with payment and payoff information, tap the **Loans** navigation tab.

- To change your future investment allocations, tap **Edit**.

- To return to the dashboard, tap **Home** from the side panel or tap ❮.

- For additional plan information and more options, tap **Call for Help** to automatically dial the number for the automated phone system.

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TIME OFF

To view your vacation balance, personal time balance, and accrual rates, tap **Time Off** from the side panel or tap ❯ in the Time Off item on the dashboard.
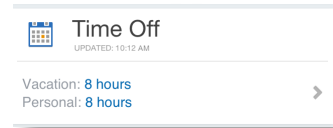
CHECK STUBS

- To view information about your most recent check, including earnings, withholdings, deductions, and check number or direct deposit information, tap **Check Stubs** from the side menu or tap ❯ in the Check Stubs item on the dashboard.

- To view the printable check stub in PDF format, tap **View Check Stub**. To return to the Check Stubs item, close the check stub window.

- To view information about a previous check, swipe down and tap the drop-down menu at the top of the screen and tap the desired check date.
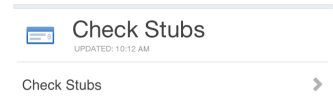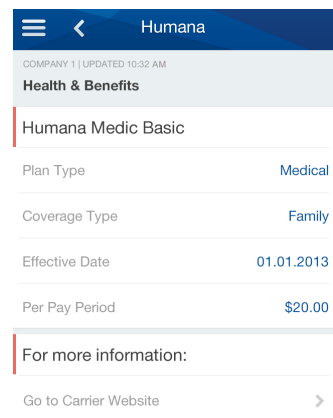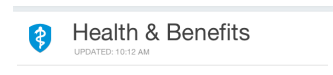
i *For Android-powered smartphones, a PDF file viewer app is required.*

i *Check summary data is only available from 4/1/2012 forward. Check stub PDF files may be viewed for a period of two years before the current date.*

HEALTH & BENEFITS

- To view your health and benefits information, including plan types, current and future enrollments, and carrier information, tap **Health & Benefits** from the side menu or tap ❯ in the Health & Benefits item on the dashboard.

- To view your coverage type, effective date, and per-pay-period premium, tap ❯.

- When viewing a plan type, you have access to one-tap links to the carrier's website and your benefits summary or member's guide. You may need to swipe up to show the "For More Information" section.

- Tap ❯ to open the carrier website with your browser app.

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FSA

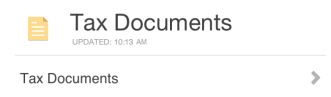- To view account balance information for dental and dependent care, and unreimbursed medical, tap **FSA** from the side menu or tap ❯ in the FSA item on the dashboard.

- To view a list of your reimbursements by check date, tap the **Reimbursements** navigation tab.
- Use the drop-down menu to select the plan or plan year you want to view.
- To view detailed reimbursement information, tap the check number.
- To return to the FSA Reimbursement view, tap ❮.

- To view your election information for medical, dental, and dependent care, including elections and employee and employer deductions for each FSA plan, tap the **Elections** navigation tab.
- To view a list of claims by entry date, including check number, status, and total amount submitted, swipe left and tap the **Claims History** navigation tab.
- For more information about a claim date, tap the claim Entry Date.
- To view a list of FSA debit card account holders and the respective card status, swipe left and tap the **Debit Cards** navigation tab.
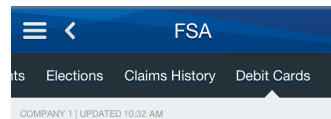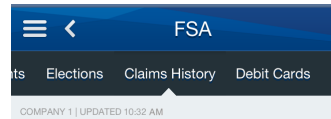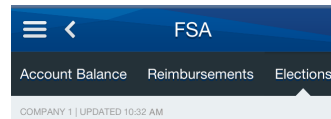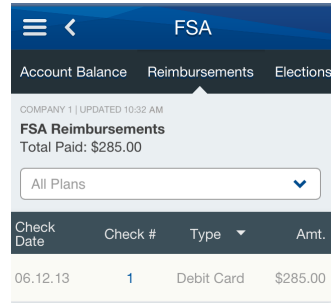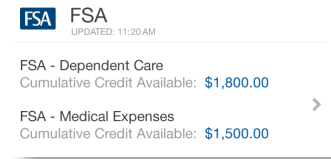

TAX DOCUMENTS

To view your Forms W-2/1099-MISC , tap **Tax Documents** from the side panel or tap ❯ in the Tax Documents item on the dashboard.

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MY PROFILE

- To view personal information, work location, work details, and personal details, tap **My Profile** from the side panel or tap ❯ in the My Profile item on the dashboard.

- To view detailed pay and compensation information, including Other Earnings and Compensation, tap the **Comp/Pay** navigation tab.

- To view your federal and state tax information, along with state unemployment information, tap the **Taxes** navigation tab.

- To view all deductions currently coming out of your pay, tap the **Deductions** navigation tab.
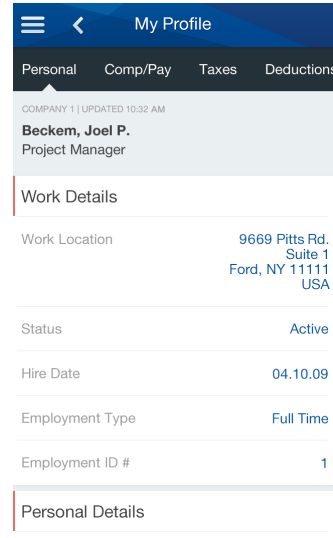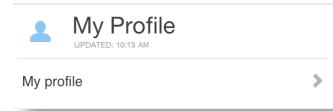
Do You Need Assistance?

FORGOTTEN PASSWORD OR USERNAME

If you forgot your password or username, tap **Forgot Username or Password?** from the Login screen. Enter your email address, security verifiers, and username (for password resets), and tap **Continue**.

MOBILE SUPPORT SITE

www.paychex.com/print/mobile

OTHER ASSISTANCE

For further assistance, please contact your company administrator, or call **888-246-7500** (toll free) for Paychex Flex app support.

Feedback

To provide Paychex with feedback about your experience with the Paychex Flex app, tap **Send Feedback** from the side panel or tap ❯ in the Send Feedback item on the dashboard.

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