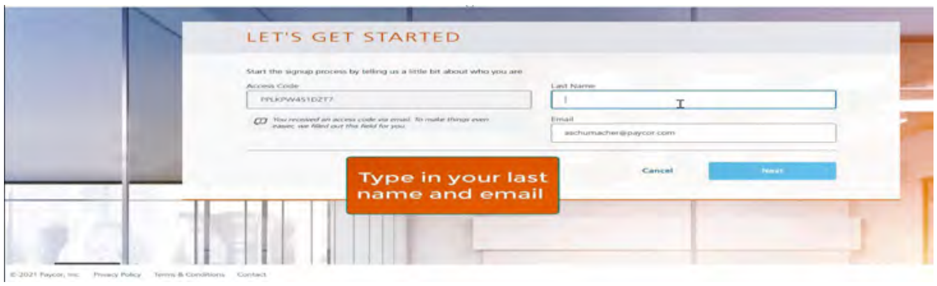
Paycor Overview

Account Setup

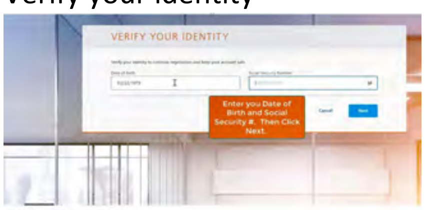
You must set up your account on a computer first before trying to access it on the mobile app.

You will receive an invitation email with an access code

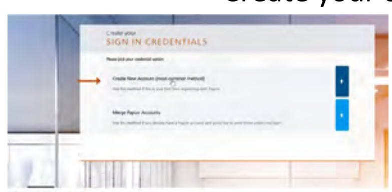
Enter the requested information then hit next



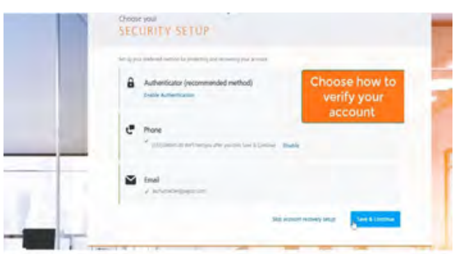
Verify your identity



Create your credentials



Choose your security setup



Complete your security questions

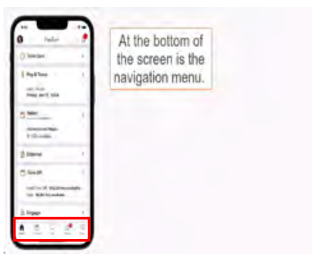
Mobile App

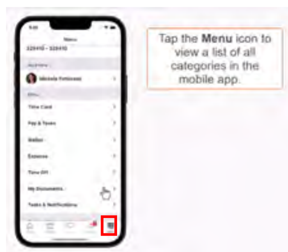
Download the Paycor Mobile App

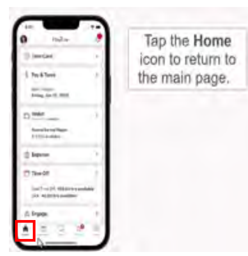
Steps:

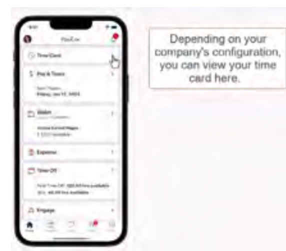
- Go to the Paycor Mobile App from the Google Play Store or the App Store
- Search for Paycor Employee Mobile
- Download the app
- Once installed, access the app by entering your Paycor.com username and password

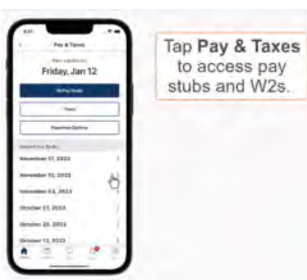
Note: You must register on Paycor.com before you can access your account on the mobile app!

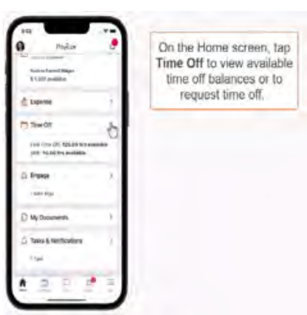


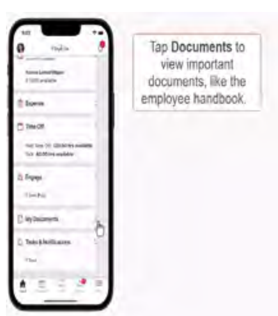


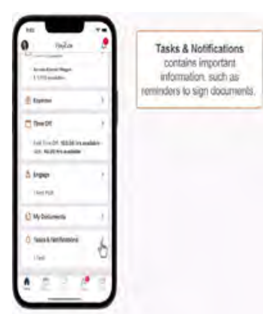


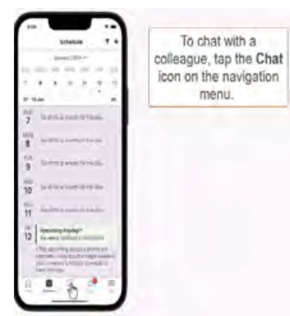


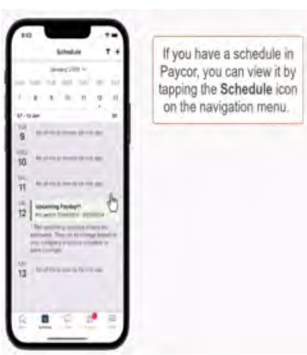


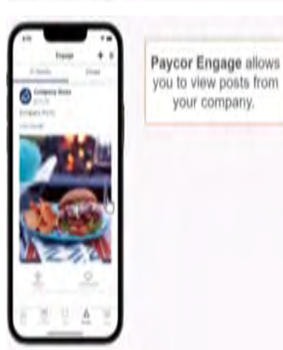








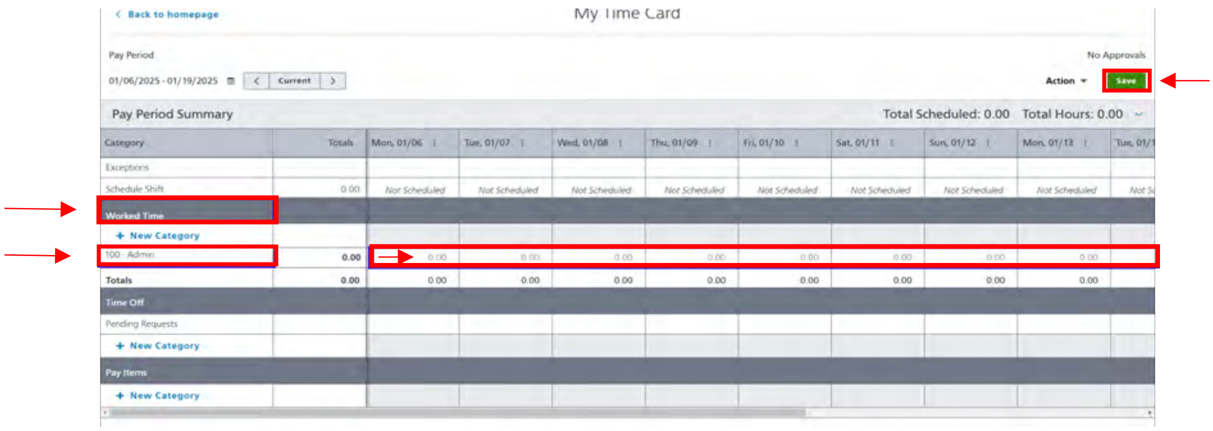




Entering Time

All hours **worked** are entered under the **Worked Time Column**.

If you only use your home Department, which is set for you, enter your hours and hit save.



To add additional Cost Centers to your day click + New Category

A pop-up box will come up, using the drop down select the Cost Center in each box: the Department box and Cost Center box. Then click save.

Once you have added an additional Category to your Time Card, it will carry-over to future Time Cards, so moving forward you can just add hours for that Cost Center.

For those with additional rates: you will no longer need to apply your rates on your time card. Additional rates correlate to the cost center you choose.

Using the example below: Your Base Rate will be applied to your home department, and your Rate 2 will be applied for hours entered in cost center 205. Any time you enter hours under cost center 205 you will be paid at rate 2.

Adding Pay Items –> On-Call Shifts and CCAT Services

To add On-Call shifts and CCAT Services Click + New Category under Pay Items.

A pop-up box will come up, Select the Cost Center in both the Department and Cost Center box.

Using the drop down in the Select Pay Items Earning box, select the shift then save.

The new Pay Item will be added to your time sheet, and will remain there for future time entry.

Paycor Pay Items- On-Call Shifts/CCAT

Clinicians

- **AOPA M-F** = Clinician Open Access Shift outside of regular hours
- **AOPA WKND** = Clinician additional Saturday outside of normal rotation.
- **OPA WKND** = Clinician Saturday
- **Relief Cli** = Relief Clinician

CONNECT

- **C M-F** = CONNECT Monday-Friday
- **C S/S/H** = Connect Saturday/Sunday/Holiday
- **CCR** = CONNECT Response
- **S M-F** = CONNECT Supervisor Monday- Friday
- **S S/S/H** = CONNECT Supervisor Saturday/Sunday/Holiday

CCAT

- **CCAT V** = CCAT Verbal Translation
- **CCAT W** = CCAT Written Transcription

Entering Activities – Activities should be entered on your time card for time spent on tasks outside of your normal job functions that you receive your base rate for.

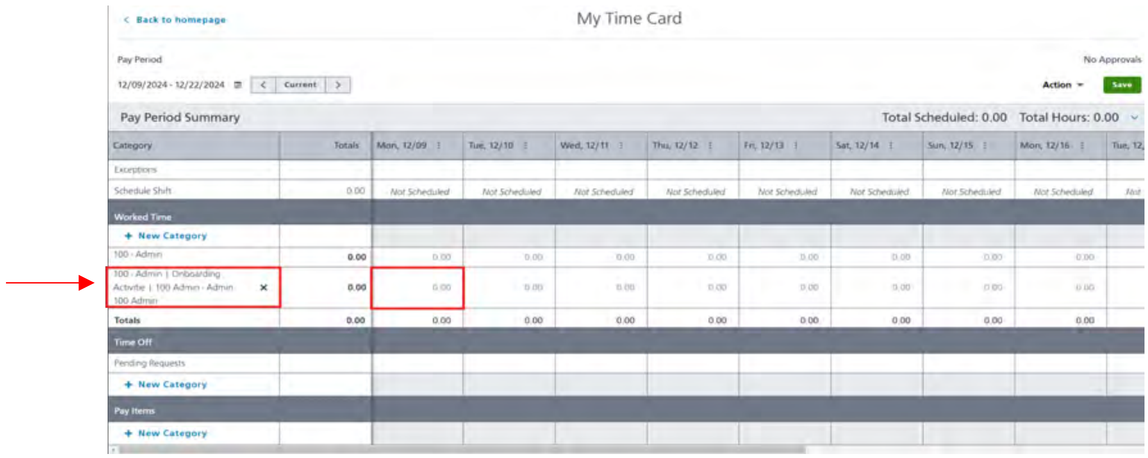
Available Options:

- Onboarding activities – such as Orientation with Human Resources, Program Specific Orientation.
- CPR Recertification
- Non-Clinician Open Access Shifts
- Relias Training
- Emerging Leaders activities
- Professional Development Day
- Electronic Disposal Day
- Community Related Activities
- Staff Training on-Island
- Staff Training off-Island
- Staff Appreciation Day

To add an activity click on **+ New Category** under **Worked Time**. A pop-up will come up.

Using the drop down arrow select the Department, and under the **Activity Type** select the activity, the click save.

The Activity will be added to your Time Card



Requesting Time Off

There are two options to request time off.

1. From your homepage

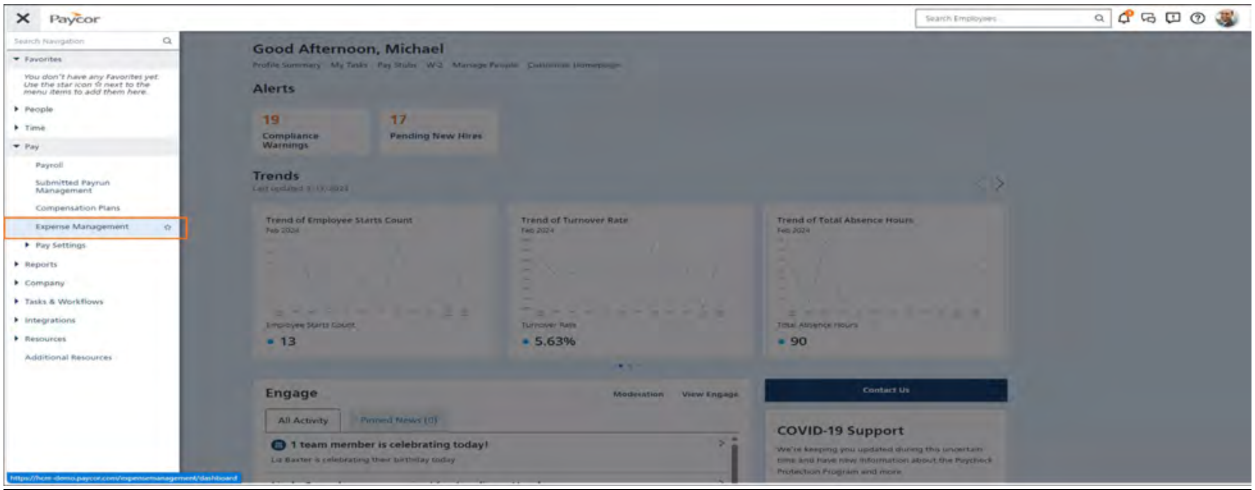
2. From your time card

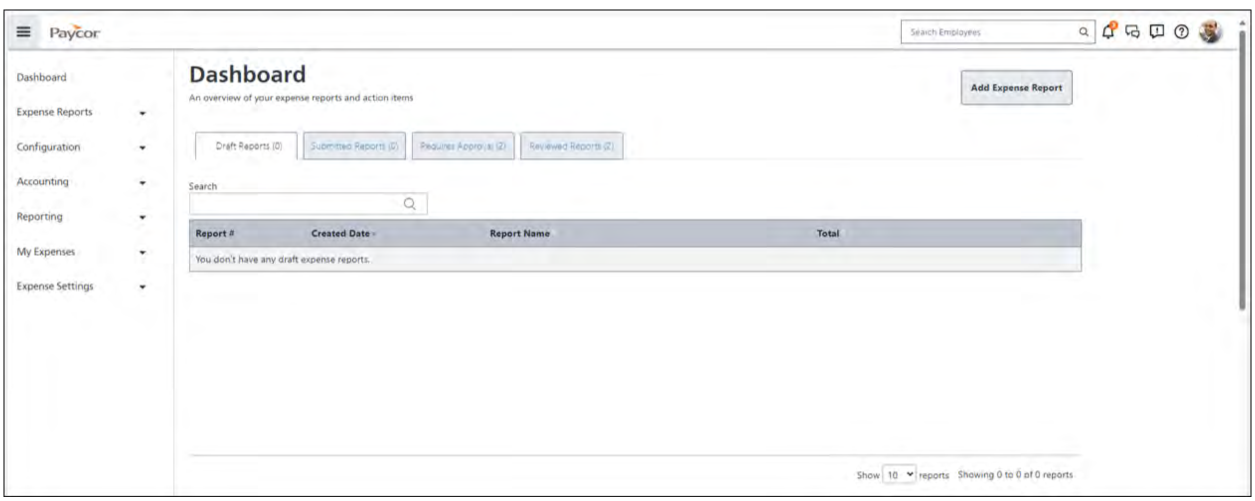
Either option will open the Time Off Request Form.

Please be sure to enter the type of time off from the drop down.

<u>Expense Reports: Expenses and Reimbursements</u>

Login to Paycor and go to Pay > Expense Management. The Expense Management dashboard appears.





To create a new expense report, you have these two options.

Either method you select displays the Expense Report screen.

Option 1:

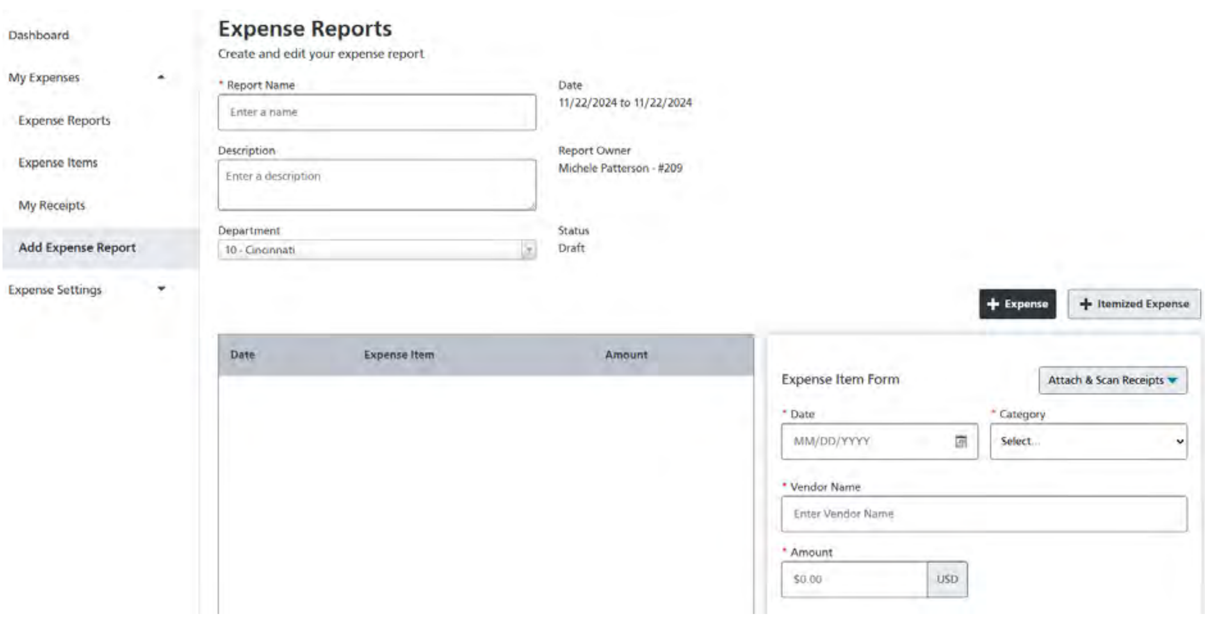
In the left menu, click My Expenses and then click Add Expense Report

Option 2: The Add Expense Report button:

The Expense Report screen appears ready to edit.

Complete these fields:

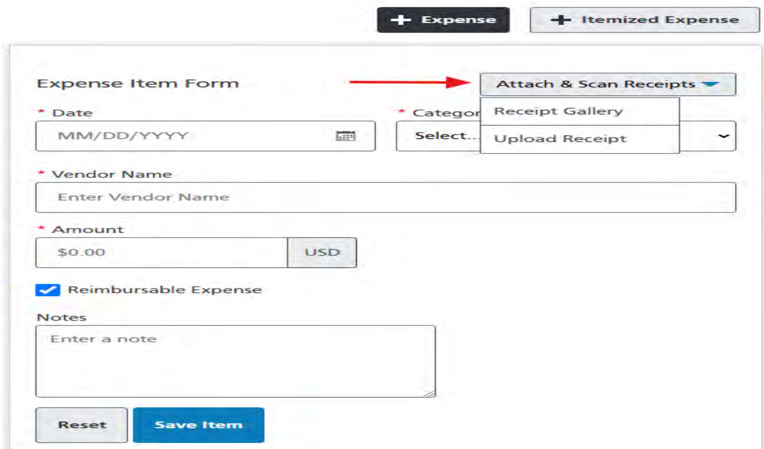
Report Name; Description; Department



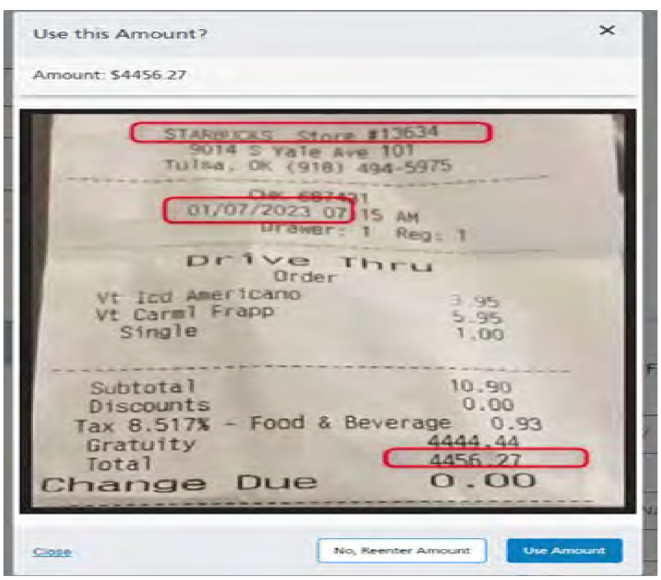
For your report, you will add one or more Expense Items. Your Expense Report might be made up of only a single Expense Item, or multiple Expense Items.

Example -On a recent business trip, you traveled by plane, stayed in a hotel, and purchased meals.

Click Attach Receipts to upload a receipt and autofill the date, amount, and vendor. Select an existing item from Receipt Gallery or add a new receipt via Upload Receipt.



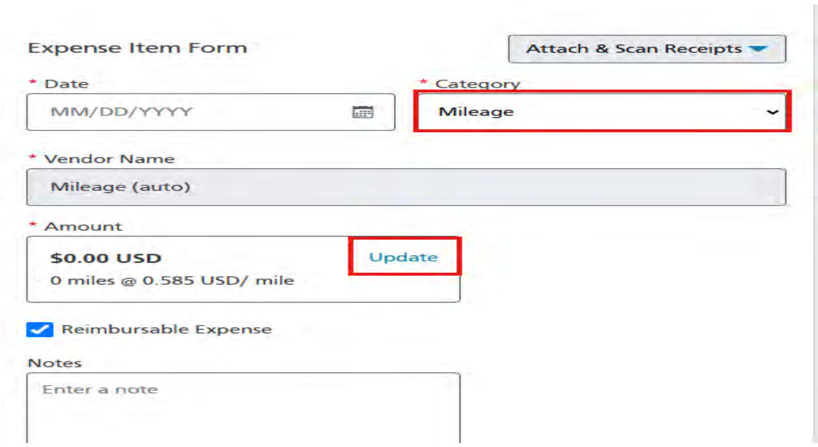
After selecting a receipt, verify the amount.



Review the Expense Item Form for corrections and completed missing fields.

Each is a separate Expense Item which makes up your total Expense Report.

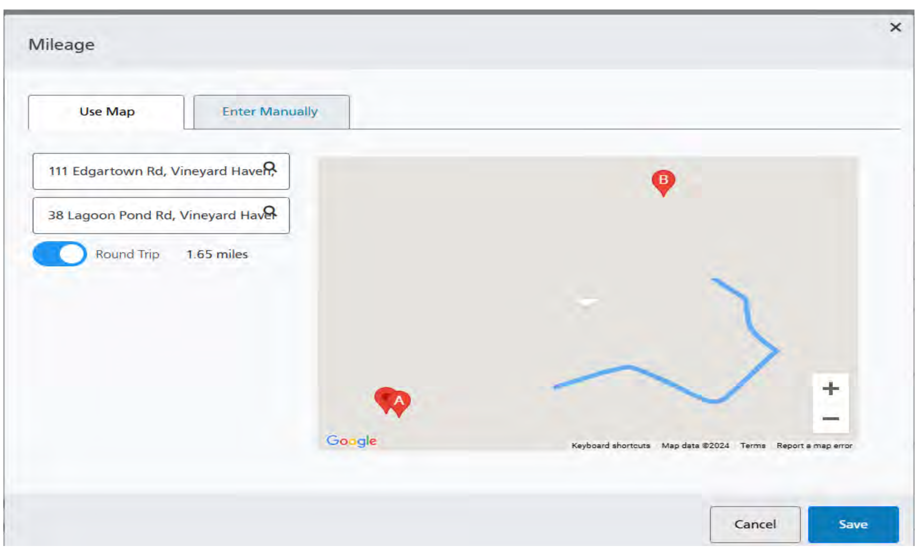
For each Expense Item, complete these fields: Date; Category; Vendor Name; Amount (in US Dollars); Notes: Enter any relevant notes.



When mileage is selected as the category the amount box will have an UPDATE link.

Clicking the update link will open a box and you can use the map to automatically calculate the distance and amount to be paid.

You also have the option to select roundtrip.

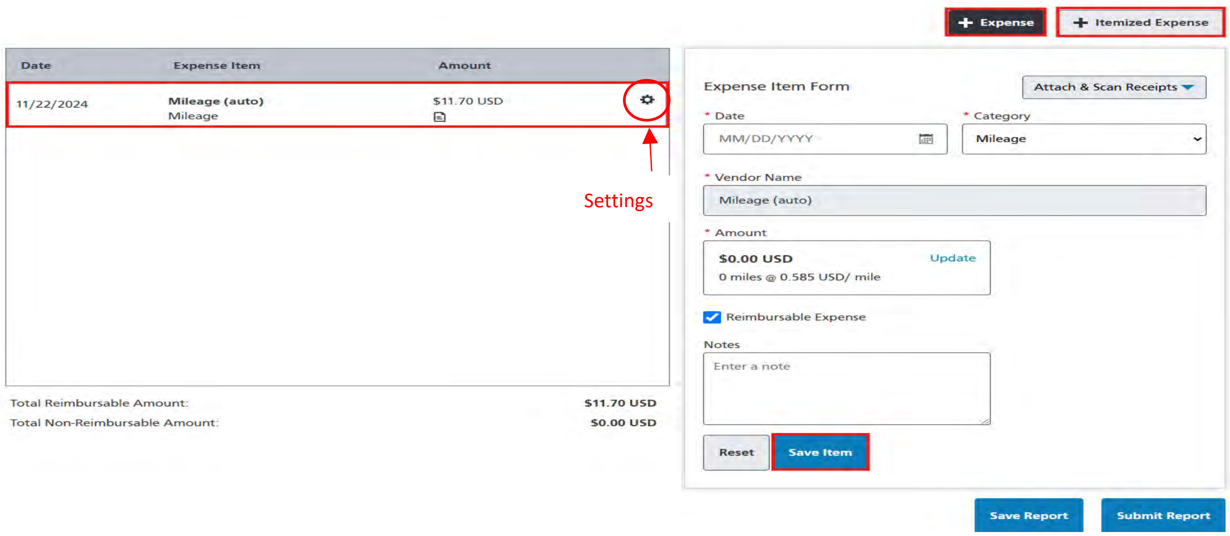


Click Save Item. The new Expense Item appears in the table on the left with these details:

Date; Expense Item; Vendor; Category; Amount.

To itemize an expense, click + Add Itemized Expense. Complete the fields and click Save Item.

The item appears in the table with the Itemized Expense label.



To add more Expense Items, on the left side click + Add Expense.
This clears out the Expense Item section on the right to add another item.
To edit an Expense Item you add in this report, on the right side click the row and the Expense Item section on the right updates with that information. Make your edits and click Update Item.

For any item in your un-submitted Expense Report, click the settings icon on the right to:
Itemize; Duplicate that item; Move the item in the report; Delete the item

When you finish adding Expense Items to the report, do one of these:
Click Save Report to save it in a draft form and work on it later.

The Expense Report will appear on your dashboard in the Draft Reports tab.
Click Submit Report to send it to the person designated to approve your expense reports.
When the notification popup appears, click Yes, Submit.

The Expense Report will appear on your dashboard in the Submitted Reports tab.
The approver will receive a notification and your Expense Report will appear in their Approval queue.

<u>**Homepage**</u>

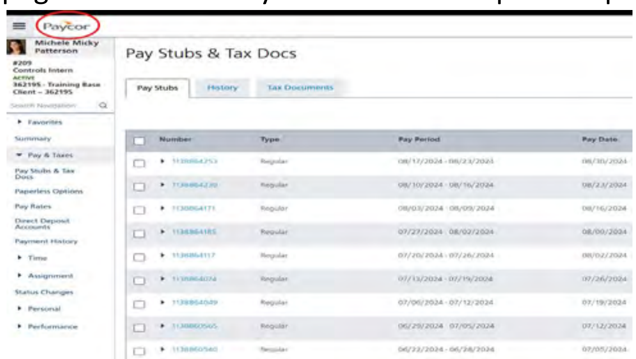
Customizing your Employee Homepage

Accessing your information click on the profile menu on the far right of your screen. Then click view profile.

Your Profile Page will be displayed, with a menu on the left to review all information in your profile.

From this page you can Access:

To return to your homepage click on the Paycor icon at the top of the page



Performance Reviews

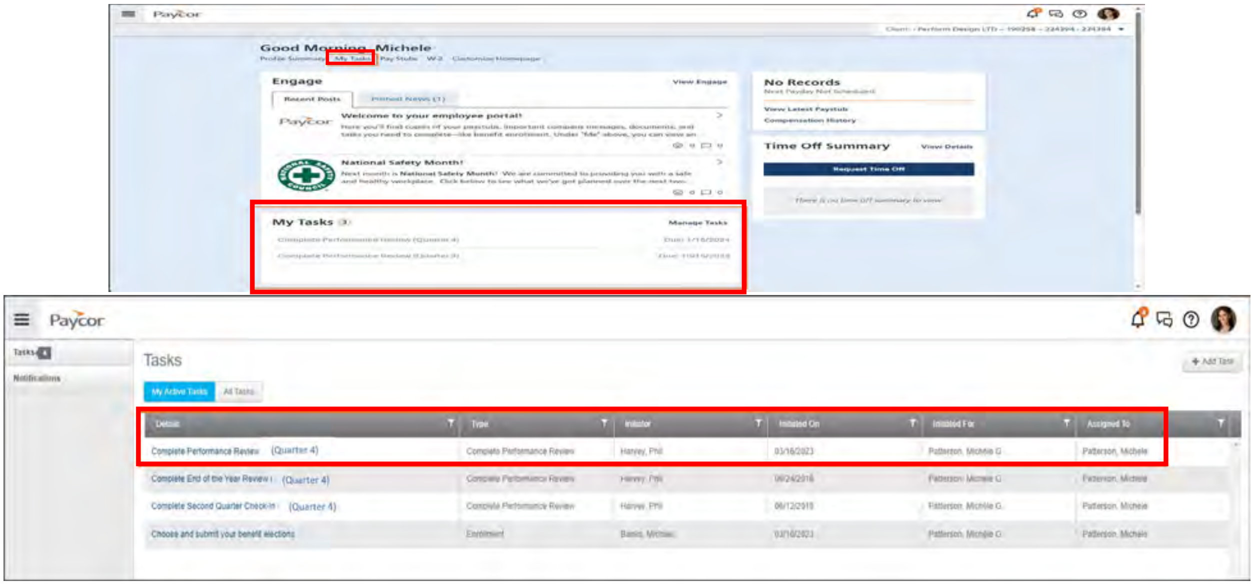
You might receive an email with a link to Access the review directly.
After you log in, you will see the awaiting review in the My Tasks section of your Employee Portal.

Steps to Access and Complete Performance Reviews

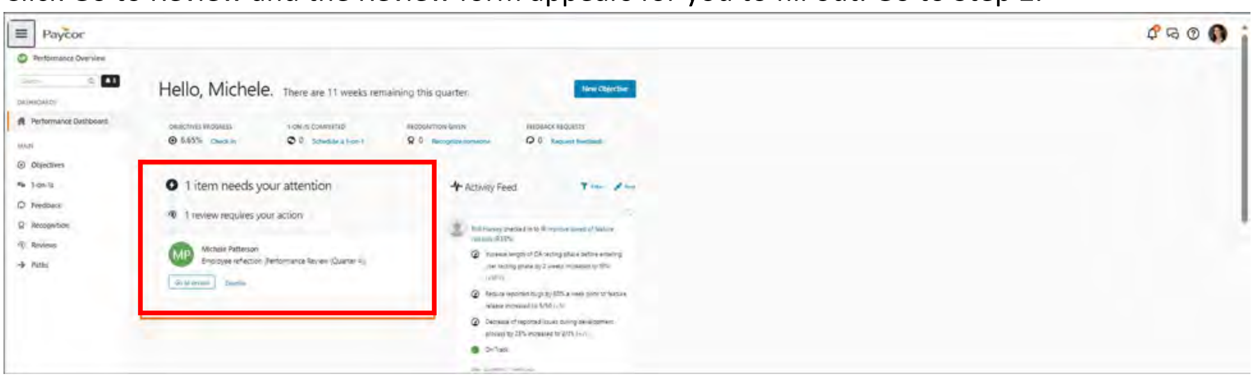
Review forms **auto-save**, so you can exit at any time and go back to finish the form and Submit review. There are two places you can access a performance review after you login:

Method 1. On your Employee portal:

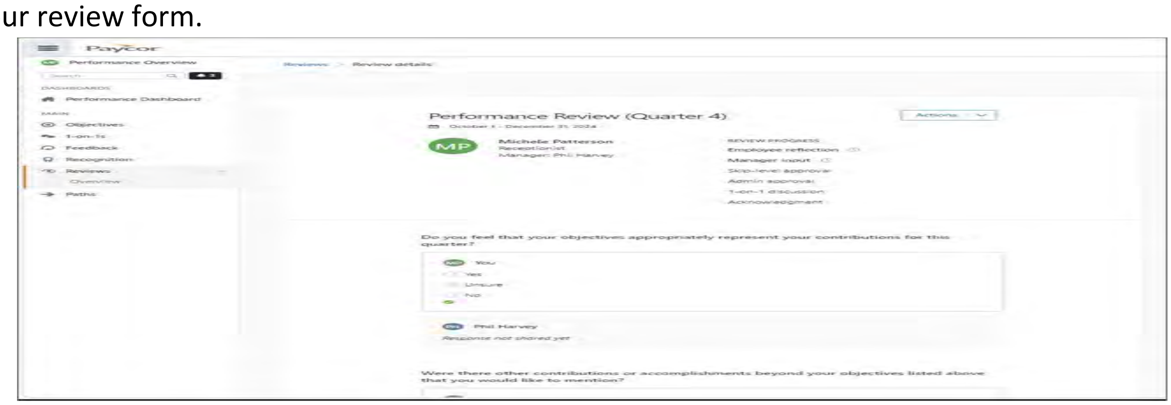
In the **My Task** section, click the review in the list.
You can also go to the top under your name, click My Tasks, and when the My Active Tasks tab appears, click the review in the list and proceed to **Step 2.**



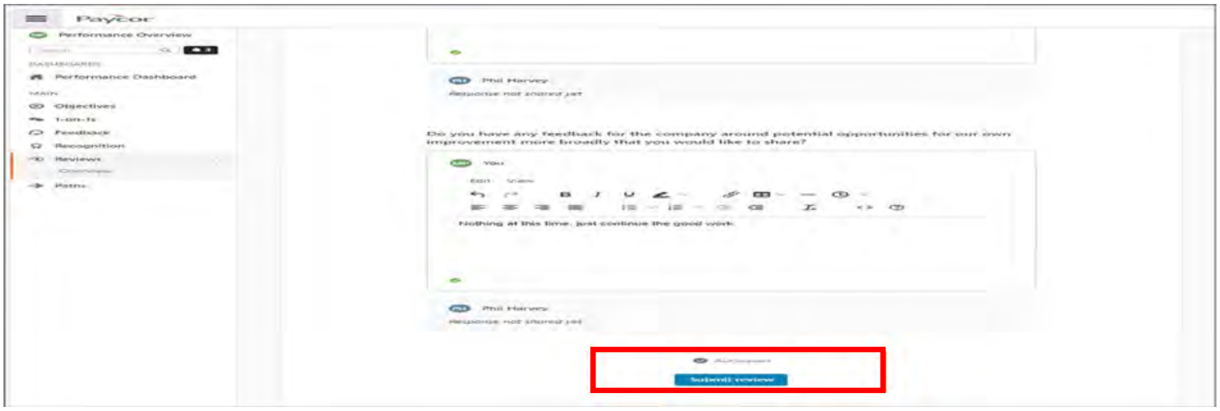
Method 2. From the left menu, click People > Performance:
On the Performance Dashboard that appears, there will be a 1 review requires your action notification about your review.
Click Go to Review and the Review form appears for you to fill out. Go to Step 2.



Note: Review forms depend on templates, and this sample form might not match the fields in your review form.



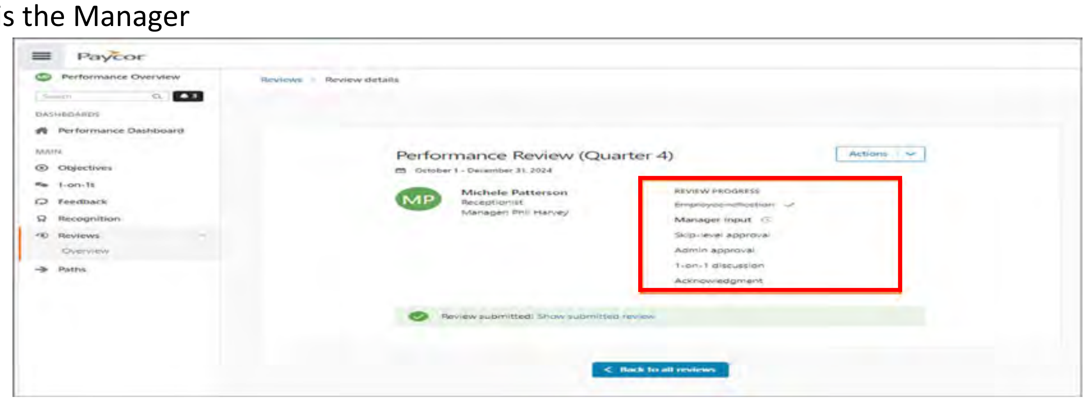
Complete each section in the form. In this example, the employee's manager is Phil Harvey who has not completed their portion and he is the next person to complete the review.
When you finish each section, click Submit review.



When the popup appears, click Submit. The review is automatically sent to the next reviewer in the process, most likely your manager.

After clicking Submit, a confirmation screen appears like the one shown here verifying the review was submitted. The review also disappears from your My Tasks list on your Employee portal.

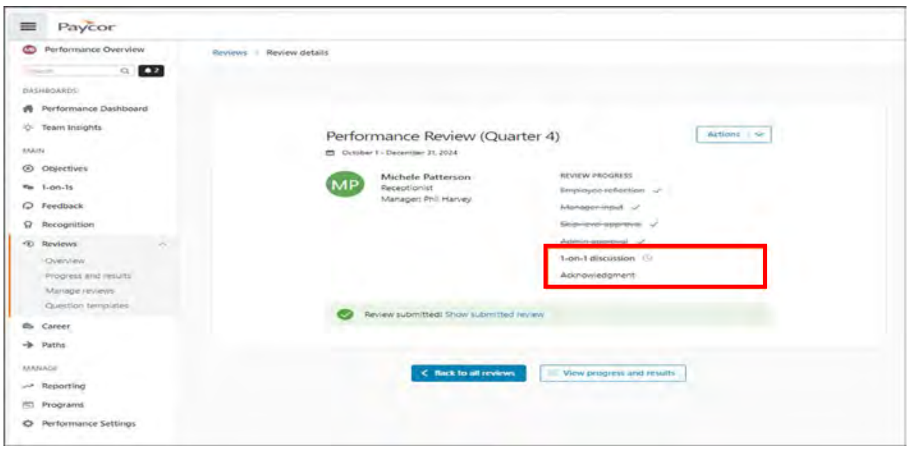
Look in the REVIEW PROGRESS section and in this sample, the next person to complete the form is the Manager



Final Steps: Meet with Your Manager and Acknowledge the Review.
After your manager and any other Review admin comments and approves your review, you will have a 1:1 meeting with your manager to talk about the review overall.

The final step after the 1:1 meeting is your acknowledgement: Your manager will send you an acknowledgement request.

You reply back and provide your acknowledgement on the review form and your review is complete.

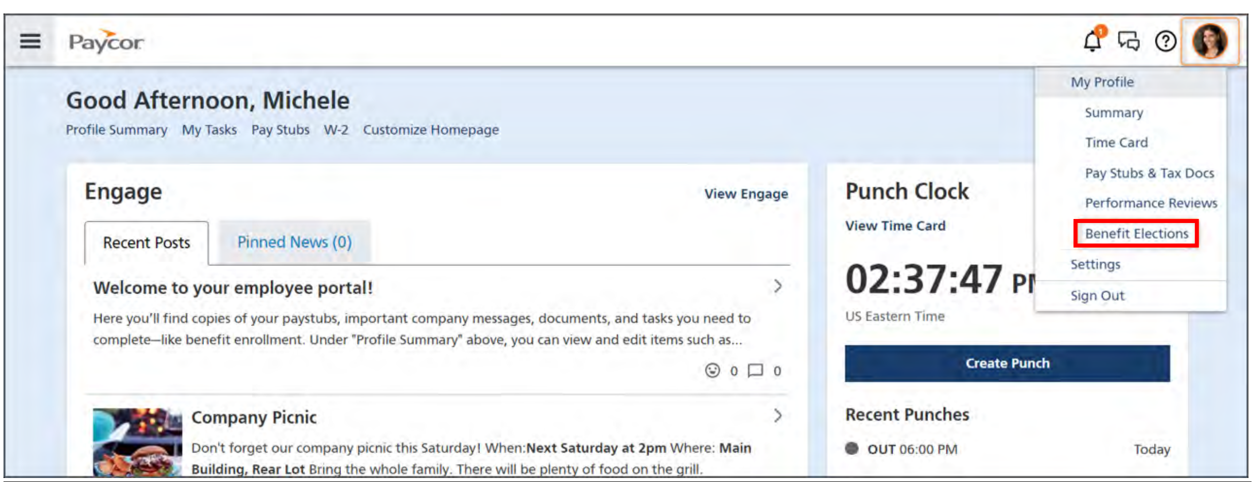


<u>Accessing My Benefits Online Portal</u>

Login to Paycor. In the upper right of all Paycor screens, click the circle Profile Menu.

Note: This menu shows the employee's photo if one has been uploaded.

Select Benefit Elections.



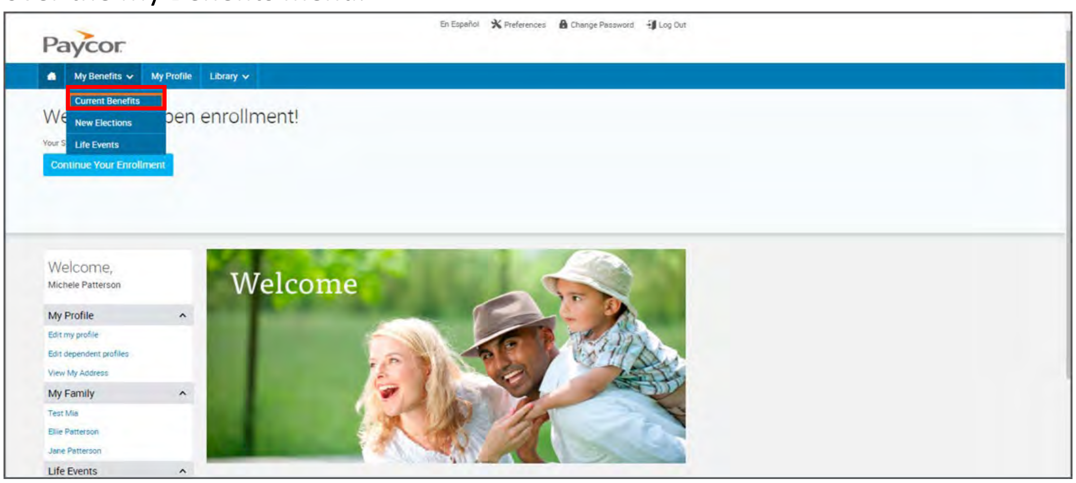
From the Benefits Home screen, you can:
View your benefits; get information on the plans you're enrolled in; find carrier information; process a life event change that allows you to update your benefits, such as:

- ➢ Marriage: add a spouse
- ➢ Birth/Adoption of a child: add a new child
- ➢ Divorce: remove a former spouse
- ➢ Loss of coverage through a spouse's plan: allows you to add benefits
- ➢ View demographic information on file. This includes name, address, phone numbers and email addresses.

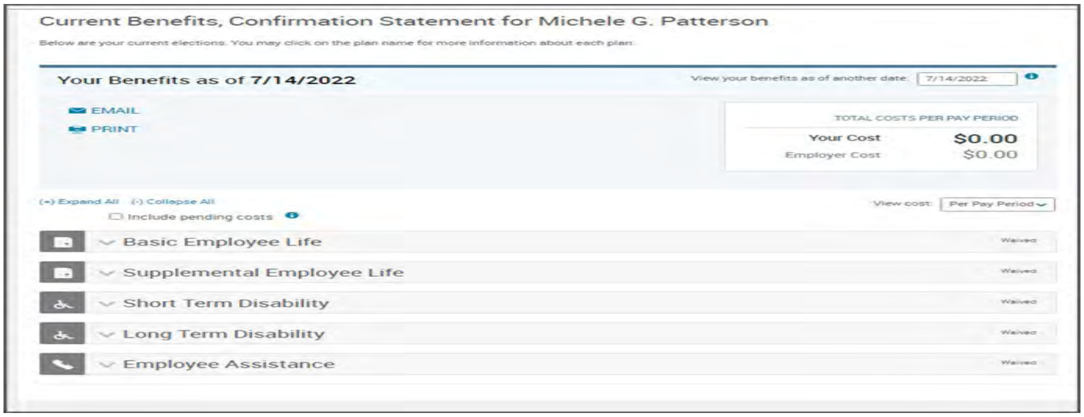
Notes: Demographic changes must be made in the Paycor system. Any data changes made there flow to the Benefits system overnight.

<u>Viewing Current Benefits</u>

You can view your current benefit information by selecting Current Benefits when hovering over the My Benefits menu.



This takes you to a summary confirmation screen that shows all benefits you are enrolled in, pending enrollments, as well as who is covered and the cost. The per pay costs reflected on the page depend on whether or not the "Include pending costs" is selected and if there are benefits in a pended state.



Additional Training Resources

Additional Training Resources