

# Paycor Overview

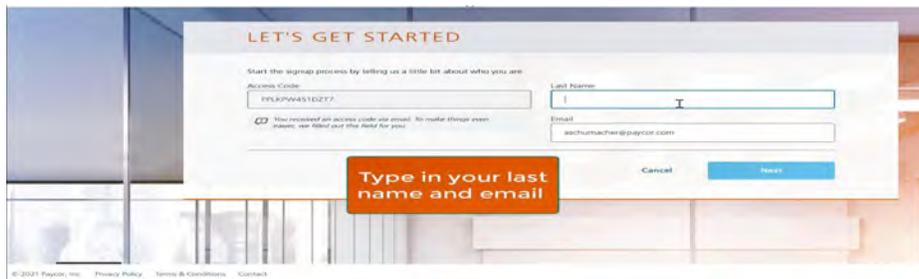
## Account Setup

**!** 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



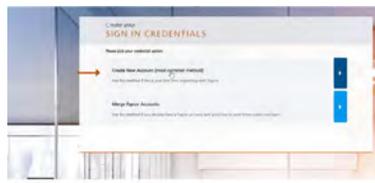
Enter the requested information then hit next



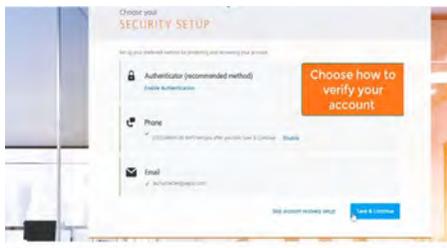
Verify your identity



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!

At the bottom of the screen is the navigation menu.

Tap the Menu icon to view a list of all categories in the mobile app.

Tap the Home icon to return to the main page.

Depending on your company's configuration, you can view your time card here.

Tap Pay & Taxes to access pay stubs and W2s.

Tap the Taxes category to view and download or print your W2.

Tap the Share icon in the upper-right to access print or email options.

On the Home screen, tap Time Off to view available time off balances or to request time off.

Tap Documents to view important documents, like the employee handbook.

Tasks & Notifications contains important information, such as reminders to sign documents.

To chat with a colleague, tap the Chat icon on the navigation menu.

If you have a schedule in Paycor, you can view it by tapping the Schedule icon on the navigation menu.

Paycor Engage allows you to view posts from your company.

## 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.

My Time Card

Pay Period: 01/06/2025 - 01/19/2025

Total Scheduled: 0.00 Total Hours: 0.00

Category	Totals	Mon, 01/06	Tue, 01/07	Wed, 01/08	Thu, 01/09	Fri, 01/10	Sat, 01/11	Sun, 01/12	Mon, 01/13	Tue, 01/14
Exceptions										
Schedule Shift	0.00	Not Scheduled								
Worked Time										
+ New Category										
100 - Admin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Time Off										
Pending Requests										
+ New Category										
Pay Items										
+ New Category										

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.

My Time Card

Pay Period: 01/06/2025 - 01/19/2025

Total Scheduled: 0.00 Total Hours: 0.00

Category	Totals	Mon, 01/12	Mon, 01/13	Tue, 01/14	Wed, 01/15	Thu, 01/16	Fri, 01/17
Exceptions							
Schedule Shift	0.00	Not Scheduled					
Worked Time							
+ New Category							
100 - Admin	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Time Off							
Pending Requests							
+ New Category							
Pay Items							
+ New Category							

Add Category

Department: 100 - Admin

Activity Type: Work

Cost Center: 210 Infant - ECP 210 Infant

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.

The screenshot shows the 'My Time Card' interface for the pay period 01/20/2025 - 02/02/2025. A red box highlights the 'Pay Period' field, with an arrow pointing to it labeled 'New Pay Period'. Another red box highlights a row in the 'Worked Time' section: '205 - Nutrition | Work | 205 Nutrition - ECP 205 Nutrition', with an arrow pointing to it labeled 'CC Remains'. The table below shows a grid of days from Sun, 01/26 to Sun, 02/02, with columns for 'Totals', '25', and various days. The 'Totals' row shows 0.00 for all categories.

### 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.

This screenshot shows the 'My Time Card' interface with an 'Add Category' pop-up box open. The pop-up box has three dropdown menus: 'Department' (selected: 515 - Outpatient), 'Cost Center' (selected: 515 Outpatient - Island Couns Ct 51...), and 'Select Pay Item Earning' (selected: AOPA M-F). The background shows the 'Pay Period Summary' table for the pay period 01/06/2025 - 01/19/2025. A red box highlights the '+ New Category' button in the 'Pay Items' section, with an arrow pointing to it.

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

< Back to homepage My Time Card

Pay Period: 01/06/2025 - 01/19/2025 No Approvals

01/06/2025 - 01/19/2025 Action Save

Pay Period Summary		Total Scheduled: 0.00 Total Hours: 0.00									
Category	Totals	Sun, 01/12	Mon, 01/13	Tue, 01/14	Wed, 01/15	Thu, 01/16	Fri, 01/17	Sat, 01/18	Sun, 01/19		
Exceptions											
Schedule Shift	0.00	Scheduled	Not Scheduled	Not Scheduled	Not Scheduled	Not Scheduled	Not Scheduled	Not Scheduled	Not Scheduled	Not Scheduled	Not Scheduled
Worked Time											
+ New Category											
100 - Admin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Totals</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
Time Off											
Pending Requests											
+ New Category											
Pay Items											
+ New Category											
515 - Outpatient   515											
Outpatient - Island Couns Ct 515											
Outpatient	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

### 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, then click save.

The screenshot shows the 'My Time Card' interface. The 'Worked Time' section has a table with columns for 'Category', 'Totals', and days from 'Mon, 12/23' to 'Sat, 12/28'. A '+ New Category' button is highlighted in the table. To the right, the 'Add Category' pop-up is open, showing a 'Department' dropdown with '100 - Admin' selected and an 'Activity Type' dropdown with 'Onboarding Activities' selected. Red arrows point to these selections. A red arrow also points to the '+ New Category' button in the table.

The Activity will be added to your Time Card

My Time Card

Pay Period: 12/09/2024 - 12/22/2024 Current No Approvals Action Save

Pay Period Summary Total Scheduled: 0.00 Total Hours: 0.00

Category	Totals	Mon, 12/09	Tue, 12/10	Wed, 12/11	Thu, 12/12	Fri, 12/13	Sat, 12/14	Sun, 12/15	Mon, 12/16	Tue, 12/17
Exemptions										
Schedule Shift	0.00	Not Scheduled	Not							
<b>Worked Time</b>										
+ New Category										
100 - Admin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100 - Admin   Onboarding										
Active   100 Admin - Admin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100 Admin										
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Time Off</b>										
Pending Requests										
+ New Category										
<b>Pay Items</b>										
+ New Category										

## Requesting Time Off

There are two options to request time off.

1. From your homepage

Time Off Summary View Details

[Request Time Off](#)

AccumBenefit - PTO

**180 HRS**  
Available Balance

**0 HRS** Used to Date | **180 HRS** Accrued to Date

AccumBenefit - Vacation

2. From your time card

Time Card Summary

Michelle Patterson Print Timesheet Request Time Off No Approvals

Period Summary Total Hours: 32,000

Date	Time Entry	Department	Rate	Daily Salary
Sun, 12/22			\$0.0000	\$0.0000
Sun, 12/22				
Mon, 12/23	09:00 AM - 12:00 PM	IT - Information Systems	3.0000	3.0000
	01:00 PM - 06:00 PM	IT - Information Systems	3.0000	3.0000
			\$ 6.0000	\$ 6.0000
Tue, 12/24	09:00 AM - 12:00 PM	IT - Information Systems	3.0000	3.0000
	01:00 PM - 06:00 PM	IT - Information Systems	3.0000	3.0000
			\$ 6.0000	\$ 6.0000
Wed, 12/25	09:00 AM - 12:00 PM	IT - Information Systems	3.0000	3.0000
	01:00 PM - 06:00 PM	IT - Information Systems	3.0000	3.0000
			\$ 6.0000	\$ 6.0000
Thu, 12/26				
Fri, 12/27				
			\$ 6.0000	\$ 6.0000

Either option will open the Time Off Request Form.

Time Off Request

Time Off Type:

Start:  End:

Available Balance: 180 hrs | New Balance Preview: 180 hrs

Requested Days & Hours

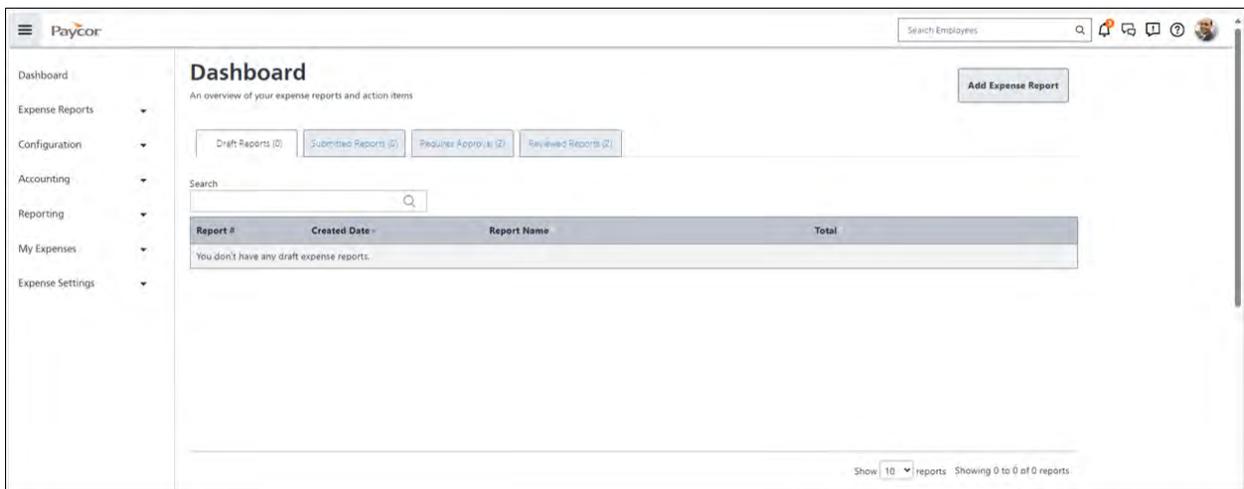
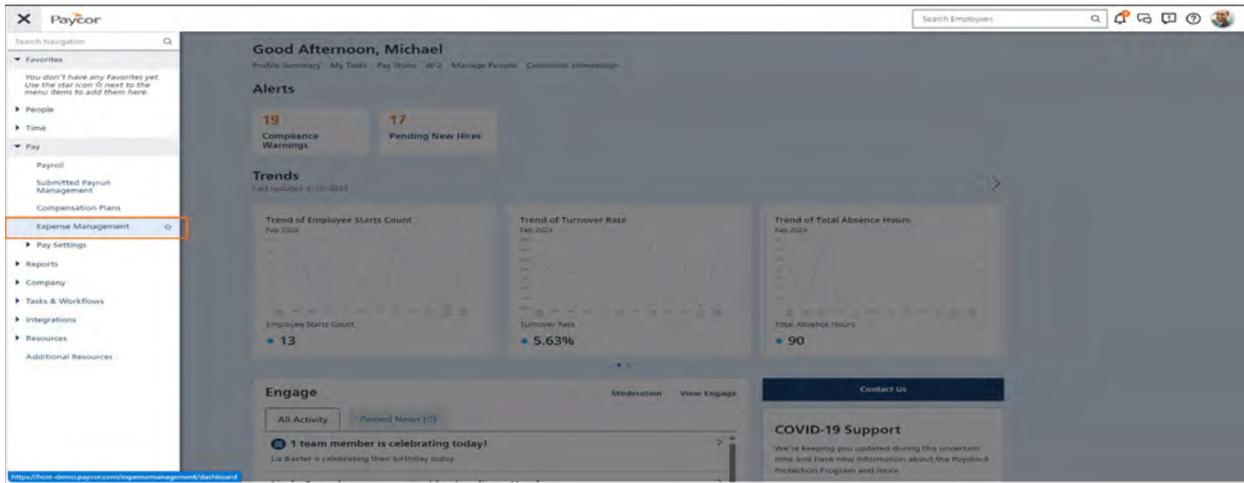
Day of Week	Schedule	Requested Time	Period Day Request Details	Requested Hours
*Select a day or range of days above.				
Total Requested Hours: 0				

Notes for Supervisor:

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

## Expense Reports: Expenses and Reimbursements

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

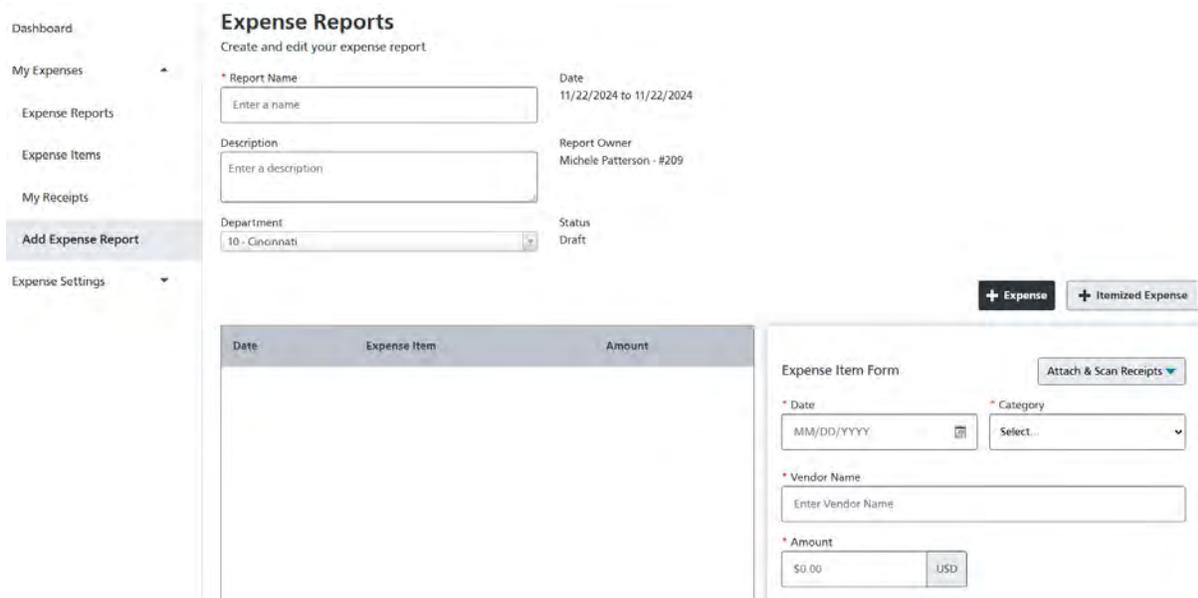
### Option 2: The Add Expense Report button:



The Expense Report screen appears ready to edit.

Complete these fields:

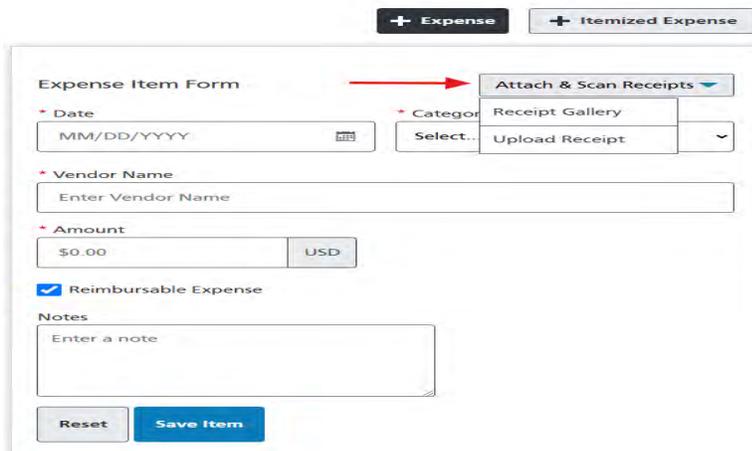
Report Name; Description; Department



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.

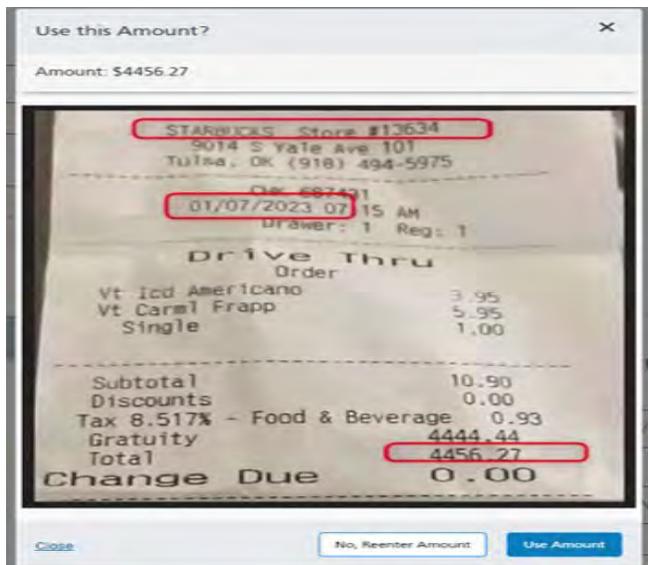
Example -On a recent business trip, you traveled by plane, stayed in a hotel, and purchased meals.

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.



The screenshot shows the 'Expense Item Form' interface. At the top, there are two buttons: '+ Expense' and '+ Itemized Expense'. Below them is the 'Expense Item Form' section. A red arrow points to the 'Attach & Scan Receipts' dropdown menu, which is currently open, showing options for 'Receipt Gallery' and 'Upload Receipt'. The form includes fields for Date (MM/DD/YYYY), Category (Select...), Vendor Name (Enter Vendor Name), Amount (\$0.00 USD), a checked 'Reimbursable Expense' checkbox, and a Notes field (Enter a note). At the bottom, there are 'Reset' and 'Save Item' buttons.

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.

Expense Item Form Attach & Scan Receipts

\* Date  \* Category

**Mileage**

\* Vendor Name

Mileage (auto)

\* Amount

**\$0.00 USD** Update

0 miles @ 0.585 USD/ mile

Reimbursable Expense

Notes

Enter a note

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.

Mileage

Use Map Enter Manually

111 Edgartown Rd, Vineyard Haven

38 Lagoon Pond Rd, Vineyard Haven

Round Trip 1.65 miles

Cancel Save

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

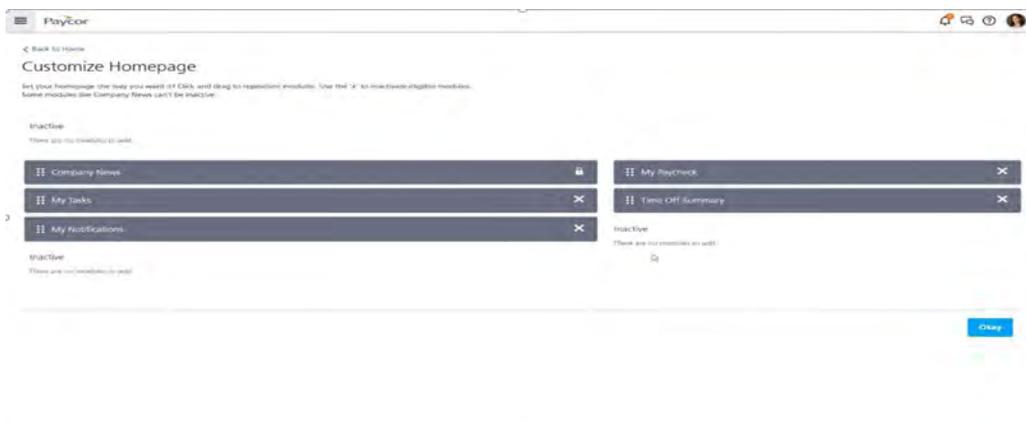
When you finish adding Expense Items to the report, do one of these:  
Click Save Report to save it in a draft form and work on it later.

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.

## Homepage

### Customizing your Employee Homepage



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

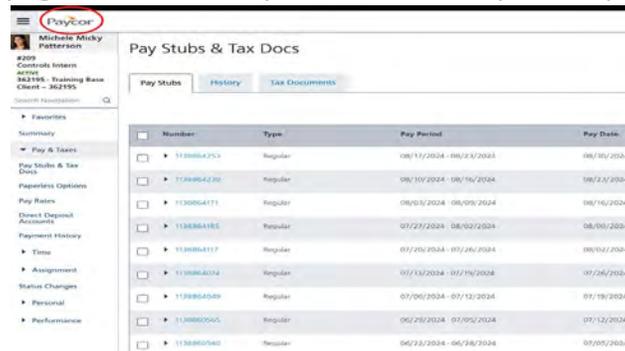


Your Profile Page will be displayed, with a menu on the left to review all information in your profile.

From this page you can Access:

Pay & Taxes	Time	Assignment	Personal	Performance
Pay Stubs & Tax Docs	Time Card	Assignment Info	Personal Info	Recognition
Paperless Options	Accrual Activity	Documents	Sync Personal Calendar	Talent Development
Pay Rates	Employee Security	Courses	I-9 Verification	
Direct Deposit Accounts	Labor Allocation	Custom Fields	Certifications	
Payment History	Labor Codes	Onboarding Checklist	Education	
		Status Changes	Skills	

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.



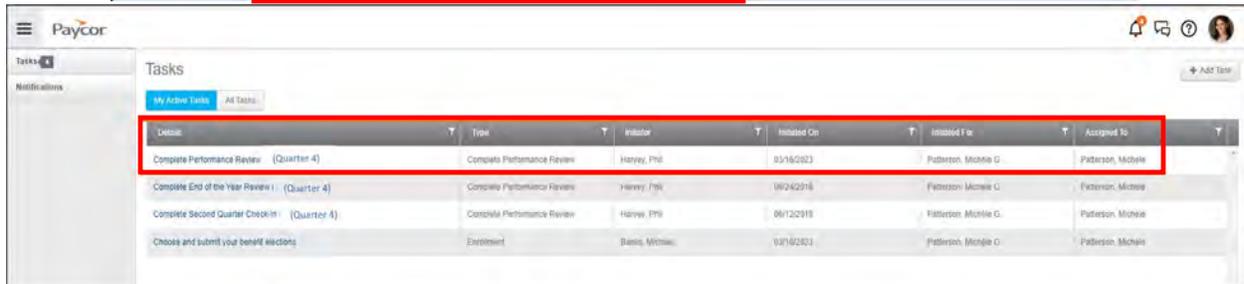
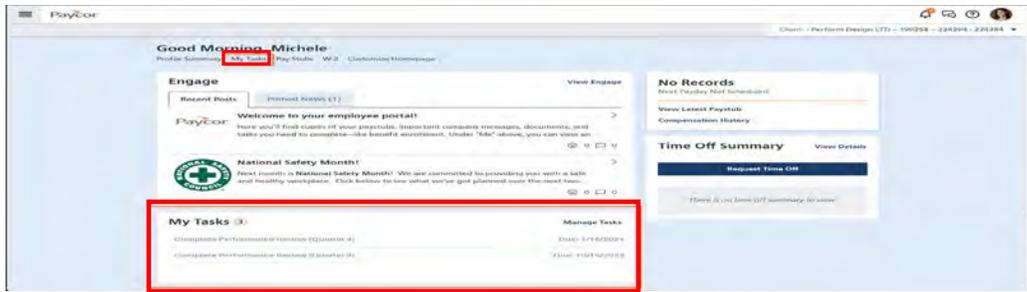
### Steps to Access and Complete Performance Reviews

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.

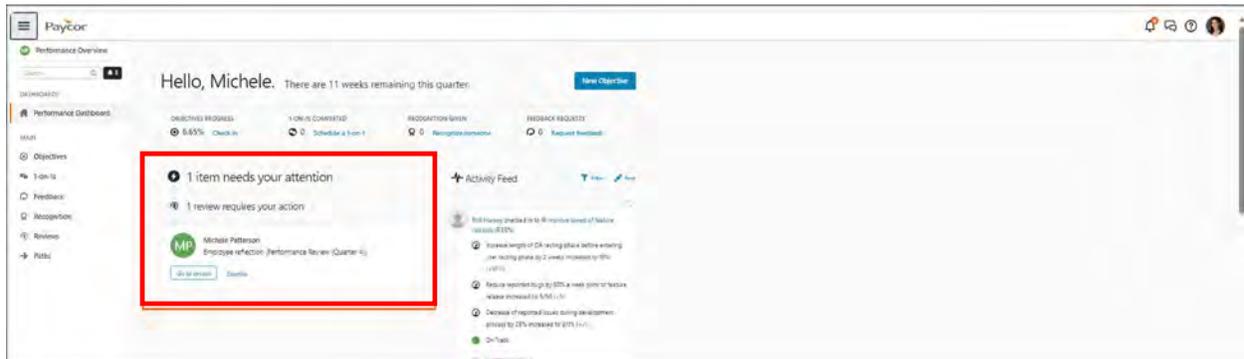
You can also go to the top under your name, click My Tasks, and when the My Active Tasks tab appears, click the review in the list and proceed to **Step 2**.



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 my Tasks review.

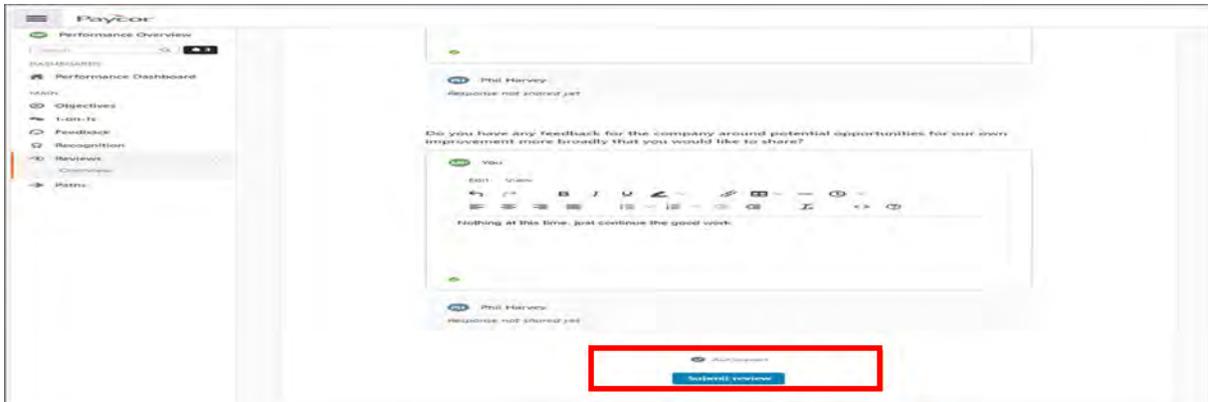
Click Go to Review and the Review form appears for you to fill out. Go to Step 2.



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.

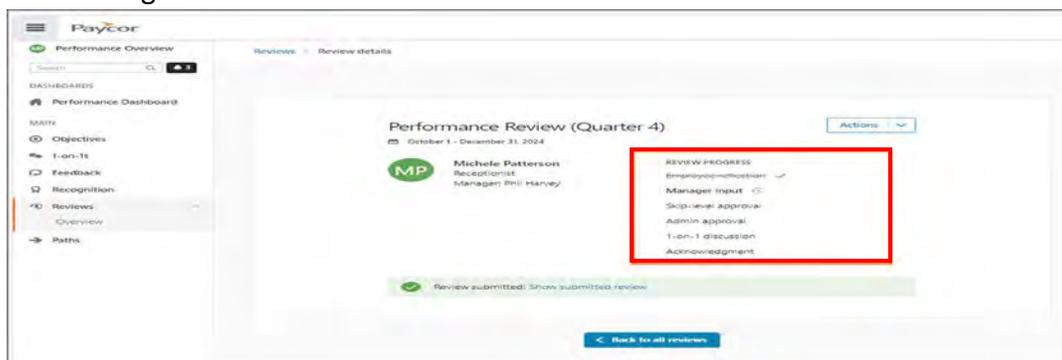


When the popup appears, click Submit. The review is automatically sent to the next reviewer in the process, most likely your manager.



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

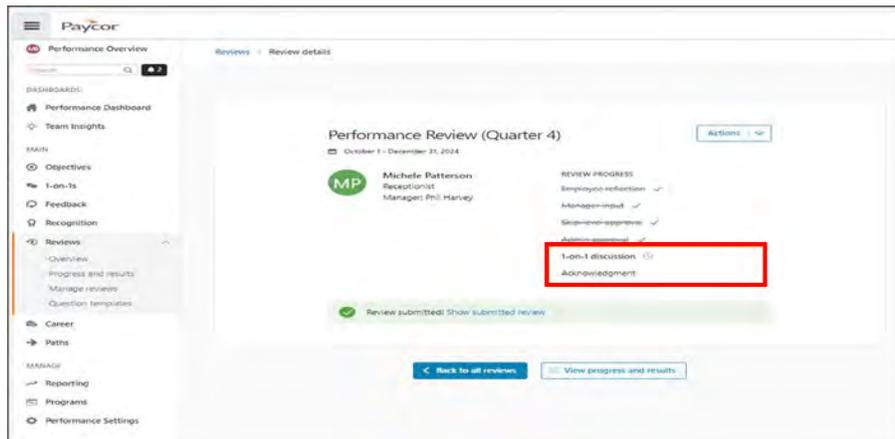


Final Steps: Meet with Your Manager and Acknowledge the Review.

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.

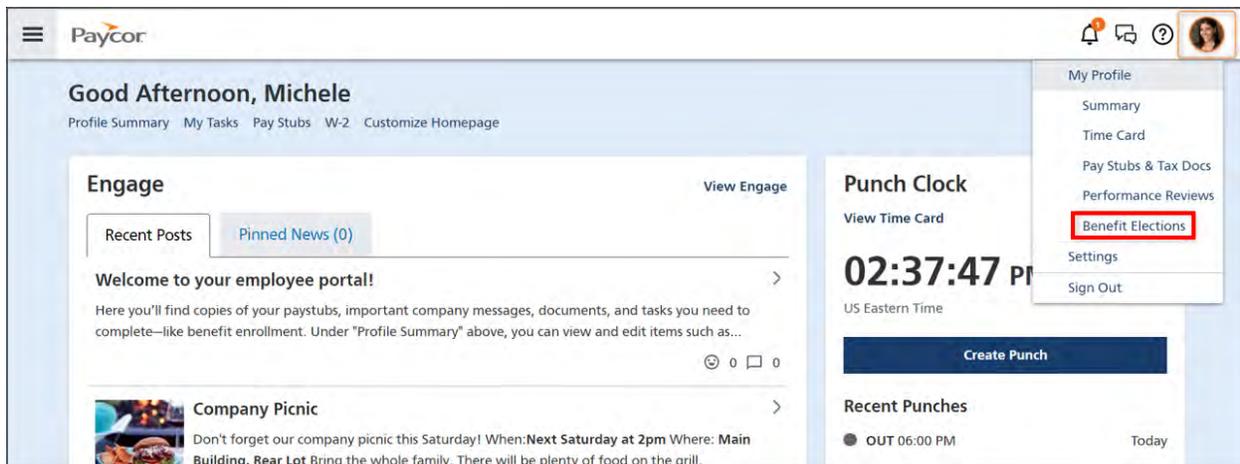


## Accessing My Benefits Online Portal

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:

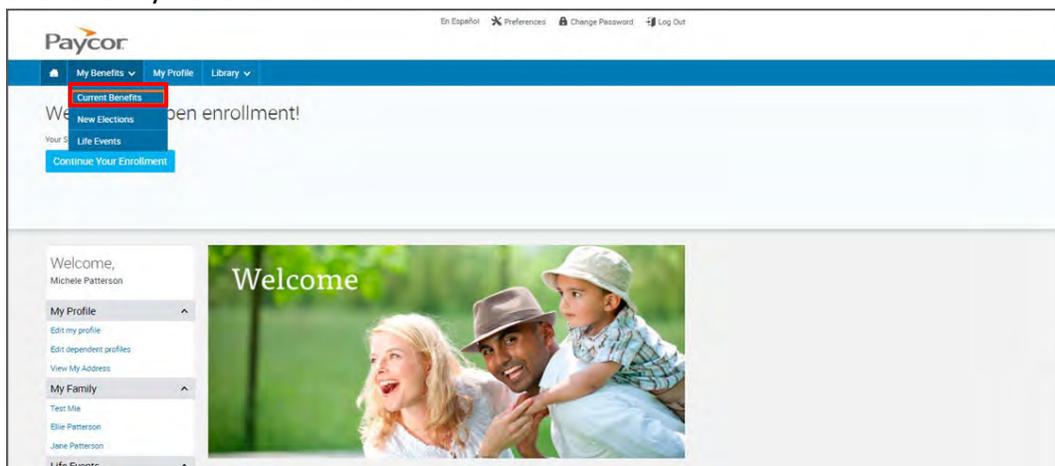
View your benefits; get information on the plans you're enrolled in; find carrier information; process a life event change that allows you to update your benefits, such as:

- 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.

### Viewing Current Benefits

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.

**Current Benefits, Confirmation Statement for Michele G. Patterson**

Below are your current elections. You may click on the plan name for more information about each plan.

**Your Benefits as of 7/14/2022** View your benefits as of another date: 7/14/2022

EMAIL  
PRINT

TOTAL COSTS PER PAY PERIOD	
Your Cost	\$0.00
Employer Cost	\$0.00

(+) Expand All (-) Collapse All  
 Include pending costs View cost: Per Pay Period

- Basic Employee Life Waived
- Supplemental Employee Life Waived
- Short Term Disability Waived
- Long Term Disability Waived
- Employee Assistance Waived

## Additional Training Resources

### Additional Training Resources

Paycor Search Employees

Good Afternoon, Michele  
Profile Summary My Tasks Pay Stubs W-2 Customize Homepage

**Engage** View Engage  
All Activity Pinned News (0)  
Company Picnic 8/26/19  
Don't forget our company picnic this Saturday! When: Next Saturday at 2pm Where: Main Building, Rear Lot Bring the whole family. There will be plenty of food on the grill.

**My Tasks (3)** Manage Tasks  
Manual - Performance Review Due: 11/23/2024  
Form Collection - Sign Sexual Harassment Training Completion Certificate Due: 11/24/2020  
Enrollment - Choose and submit your benefit elections Due: 11/30/2015

**My Notifications (0)**  
There are no notifications to view.

**Punch Clock**  
View Time Card  
12:21:40 PM  
US Eastern Time  
Create Punch

**Recent Punches**  
OUT 06:00 PM  
IN 01:00 PM  
OUT 12:00 PM  
IN 09:00 AM  
Report a Missed Punch

**1 day**  
Until Your Next Paycheck  
View Latest Paystub  
Compensation History

Get Help  
Knowledge Base  
Search our articles, guides, and videos  
Guided Knowledge  
In-App Resources

Paycor

Looking for the Paycor Support Center? [Click Here](#)

**How can we help you?**  
Search our articles, guides and videos to get the knowledge and support you need.

Start Typing your question...

Popular topics: How Do I Manage Access for Employees?, Paycor Mobile App, Employee Features

**Browse our Knowledge Base**

- Help for Administrators  
Browse Topic
- Help for Managers  
Browse Topic
- Help for Employees  
Browse Topic