Welcome to Paychex Flex®

Congratulations on making the decision to join the Paychex family! We are looking forward to building our relationship and exceeding your expectations. During the implementation process, you and your employees will need to create Paychex Flex accounts. This document will provide you with some tools to make this as seamless as possible.

Administrators

As the plan administrator, you will be responsible for ensuring that employees receive the information needed to register their accounts in Paychex Flex. For employees to register, you will first need to ensure that they are added to Paychex Flex People.

If the employee is not already added, follow these steps:

- Log into Paychex Flex

- From your dashboard, select the people icon on the top right of your screen to open your people list

- At the top, select People List + Add

- Choose the appropriate employee type (Import, Send Account Invites and Refresh)

- ***Important*** Please ensure that "Send Paychex Flex account invite" is toggled ON, otherwise the employee will not receive the invitation to register

Send Paychex Flex account invite

Once you save this person's information, they'll automatically receive an invitation to create their account. Then, they can provide their info, view paystubs, and access Help Center. If you opt-out, you can invite them later instead.

- Enter the employee's information in the appropriate fields

  - ***Important*** the information that you enter for the employee must be exactly what the employee uses when they register

    - Example: If you enter Nicholas for a first name, and the employee registers with Nick — they will not be able to complete the registration

- Click Save and Continue

- Enter the remaining information

- Click Finished

- Once you click Finished the employee will receive an email invitation. They will use this email to create their account

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Pro Tips:

- We recommend having the employee register the day after they are added to Paychex Flex to allow for their information to fully update

- Paychex Flex accounts should not be shared — one person per account

- Employees need to register and setup their accounts themselves, please do not set this up for them. There are security questions asked of the employee during the registration process and should they need assistance, they will need to know the answer to these questions

Checkout Online Help Center for Additional Assistance

From whatever page you are on in Paychex Flex, you can select the online Help Center from your left-hand navigation bar for help with your everyday needs. Once you are in Help Center, you can search by typing your question in the search bar, or selecting one of the categories in the menu. You will also find a variety of articles and videos to assist.

[? Help Center]

Employees

Let's get started!

- We recommend that you use one of the following web browsers:
    - Chrome (preferred)
    - Firefox (secondary)

- You will need to have this information ready to complete your registration:
    - Name (First, Last, and Middle Initial)
    - Address
    - Phone Number
    - Social Security Number
    - Primary Email Address

Let's get you registered:

1. You should have received an email from *Paychex Flex (noreply@paychex.com)* **with a unique link:**

   a. From the email, click on complete account setup. Enter in any missing information on the about you page and click continue

   b. On the login details page, enter in the credentials that you would like to use and click continue

   c. On the security settings page, you will set up your security questions and answers along with how you would prefer to receive verification codes — If you need to reach out to Paychex for assistance, you will need to know the answer to the questions that you chose

       i. On occasion, you'll answer one of these questions when logging in. Pick four easy ones, then enter your answers

   Password Requirements:
   - 8-32 characters
   - no spaces
   - at least 1 uppercase and 1 lowercase letter
   - at least 1 number
   - cannot contain username
   - acceptable symbols are @ . (Period) - and _

   ?

   d. Click finish to complete your registration. You will now be able to log in with the username and password that you just created

e. From here, you will see a task to finish updating your personal information

   i. If your administrator would like you to complete other tasks (for example, setup direct deposit, W-4, etc.) you will see this task listed as well

f. Follow the prompts to enter in the remaining details and click save

g. Complete all tasks assigned and you are all set

2. Didn't get an email?

a. Check your spam folder

b. If you still do not have an email, you can go directly to http://www.paychexflex.com to register

c. Complete the information in steps 1-5 to create your account

d. Upon completion an email will be sent to the address you used to register, when you receive this email please click the link to activate your account

Need Assistance? We are here to help!

- First step is to ensure that the data you are entering matches ***exactly*** what your administrator added into the system for you
  - Example: If you enter Nick as your first name, and your administrator adds you as Nicholas – you will not be able to complete the registration
- If you have confirmed with your administrator that what you are entering is an exact match, and you are still experiencing issues, please engage your Paychex Flex Assistant by clicking on the questions icon at the bottom right of your screen **?**
- Choose ***Help with sign up***
- You will have a list of options to choose from, select the appropriate option for assistance

Forgot Username or Password?

- From the login-page, click on ***forgot username or password***
- Select username or password and the delivery method for us to send you appropriate verification information
  - To reset your username, we will need to send an email to the address on file
  - To reset your password, we can send a verification code to your phone or email a link
- Need additional help?
  - Please engage your Paychex Flex Assistant by clicking on the questions icon at the bottom right of your screen **?**
  - Choose ***Help with login/account***. You will have a list of options to choose from, select the appropriate option for assistance

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